YOUR  
LOGO

**COMPANY NAME**

INVENTORY CYCLE COUNTING PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to implement your Inventory Cycle Counting program. We help organizations improve inventory accuracy, reduce shrinkage, and streamline warehouse operations through structured, data-driven cycle count initiatives.  
  
This proposal outlines our approach to designing and executing a cycle counting system for [Client Name].

# Project Objectives

The primary goals are:  
  
- Increase inventory accuracy without disrupting operations  
- Replace or reduce full physical inventory counts  
- Implement systematic cycle count scheduling based on item importance or movement  
- Identify and resolve root causes of inventory discrepancies

# Proposed Services

Our inventory cycle counting services include:  
  
- Inventory classification (ABC or velocity-based)  
- Cycle count scheduling and process design  
- Training for warehouse staff on count procedures  
- System integration support with ERP/WMS platforms  
- KPI dashboard setup and reconciliation guidance  
- Root cause analysis and continuous improvement plan

# Scope of Work

Scope includes:  
  
- Initial assessment and inventory segmentation  
- Cycle count process documentation and checklist creation  
- Pilot test planning and execution  
- Full deployment strategy with reporting templates and governance guidelines

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Assessment & Planning | Classify inventory and define count criteria | [Start Date] |
| Process Design | Create SOPs and count documentation | [Date] |
| Pilot & Training | Test cycle count and train warehouse staff | [Date] |
| Deployment & Reporting | Launch full schedule and performance metrics | [Completion Date] |

# Pricing

Estimated cost breakdown for cycle counting services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Assessment & Segmentation | Classify and group inventory items | [Amount] |
| Process Design | Develop count schedule and procedures | [Amount] |
| Training & Pilot | Staff enablement and initial count | [Amount] |
| Reporting & Monitoring | Dashboard and ongoing KPI tracking | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a supply chain and operations consulting firm with a focus on warehouse optimization, inventory management, and performance reporting.  
  
- Experience: [X] years improving inventory practices across retail, manufacturing, and logistics  
- Expertise: Cycle counting, ERP/WMS integration, inventory accuracy KPIs  
- Mission: To create operational reliability by aligning people, processes, and systems

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: Cycle counting implementation for a national distributor  
- Outcome: Inventory accuracy improved from 88% to 98% within 6 months  
  
Testimonial:  
“[Your Company Name] helped us put in place a simple, repeatable process that gave our team confidence in the numbers.” — [Client Contact]

# Terms and Conditions

Payment Terms: [X]% deposit, balance on final deliverables.  
Scope: Includes assessment, count process design, system support, and training.  
Client Responsibilities: Provide access to item master data, warehouse layout, and system permissions.  
Adjustments: Changes in facility count, item volume, or customization needs may affect pricing and delivery timeframes.

# Acceptance

To approve this Inventory Cycle Counting Proposal and begin services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_