



VALIDATION OF RETAIL VALUE OF ITEMS IN STORE

Case Study: Retail Inventory – Advisory, Lending and Investment Company

An advisory, lending and investment company needed a solution to **audit a stock count to validate the retail value** of items in stores and warehouse

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An advisory, lending and investment company work with business owners, investors, and operators to help them move forward through change. With services in valuations, dispositions, operations and investments the company provide rapid solutions and reliable outcomes for clients at all points in the business life-cycle. Whether to fuel growth or facilitate strategic consolidation, working across industries and around the world to put assets to their highest and best use.



REQUIREMENT

An advisory, lending and investment company needed a **stock count to validate the retail value** of items in stores and warehouse, so required RGIS to provide the following:

- **Validate** the retail cost of stock both in stores and in the warehouse
- All backroom stock, shop floor stock including mannequin and window display merchandise to be checked
- **Accuracy verification** of third party counting
- **Record** any errors
- To be completed during normal working hours with **no disruption to business**



SOLUTION

An advisory, lending and investment company partnered with RGIS to complete the **stock retail value validation project**, and provided the following:

- **Recorded the retail value** of the item counted and number of units/pairs counted
- **Recorded the variance** to the expected amount and asked for reasons to why there is a variance, recorded the reasons
- **Verified a minimum of 10%** of all areas in stores and warehouse
- Additional **random checks** in stores and warehouse for accuracy
- Communicated every 30-45 minutes with the Store Manager or Inventory Lead as to progress, verification accuracy, percentage of completeness and value variance
- Noted whether the areas were counted as either:
 - Auto Quantity (AQ) – all items scanned individually
 - Multi-Quantity (MQ) – one item of a group scanned and a quantity entered
- **Inventory Assessment Forms** using objective scoring and constructive commentary



RESULTS

An advisory, lending and investment company found by outsourcing the **stock retail value validation project** to RGIS, the following results were achieved:

- Stock count was **completed with retail value**
- The customer had an **understanding of the total retail stock value**, with **accurate reporting** in each store and within the warehouse
- **All variances of value were recorded** with reason why

By partnering with RGIS, the advisory, lending and investment company had an accurate **total value for the stock** of the retailer with an **explanation for all variances**



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Stock Count



Experienced Team



Random Checks



Accurate Reporting



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