

**SUPERVISE STOCK COUNTS**

**LEARNER WORKBOOK**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**U/S 118043**



|  |  |
| --- | --- |
| **LEARNER NAME AND SURNAME:** |  |
| **LEARNER ID NUMBER:** |  |
| **EMPLOYER NAME:** |  |
| **DATE OF SUBMISSION TO FACILITATOR:** |  |
| **FACILITATOR EVALUATION OUTCOME (RM/RNYM)** |  |
| **ASSESSOR ACKNOWLEDGE**  **RECEIPT: Signature:** |  |



**1**

# CONTENTS

Learner Workbook Instructions …………………………Pg.3

Formative assessment record sheet: supervise stock counts …………………………Pg.4

Learner workbook checklist …………………………Pg.5

Declaration of authenticity of evidence …………………………Pg.6

Activity 1 …………………………Pg.7

Activity 2 …………………………Pg.10

Activity 3 …………………………Pg.11

Group activity 1 …………………………Pg.12

Group activity 2 …………………………Pg.13

Activity 4 ………………………....Pg.14

Activity 5 …………………………Pg.15

Knowledge test…………………………Pg.16

**2**

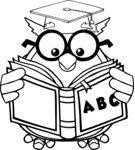
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| **LEARNER WORKBOOK INSTRUCTIONS** |
| **118043: Supervise Stock Counts Performance** |

1. This **LEARNER WORKBOOK** contains the:

## Formative Activities



ACTIVITY 1



Formative **Knowledge Questionnaire** – theory questions

**GENERAL NOTES:**

1. You must submit the Learner Workbook to the Assessor on the dates agreed upon in your assessment plan

1. You need to complete the **Authenticity page** in each Learner Workbook

1. Should the Assessor indicate that you need to make corrections to your activities to meet the requirements, you need to arrange a re-submission date with the Assessor

1. You MUST complete ALL the ACTIVITIES successfully to be deemed COMPETENT for the unit standards.

1. You will not be allowed to proceed to the SUMMATIVE ASSESSMENT unless ALL your FORMATIVE TASKS meet requirements.

1. Your Facilitator and Assessor will give you TWO opportunities to submit a task

1. All signatures must be retrieved where requested – retrieve this on a daily basis from the workplace

1. **Activities must be completed in the Learner Workbook** and NOT in the Learner Guide.

**3**

## FORMATIVE ASSESSMENT RECORDSHEET: SUPERVISE STOCK COUNTS

**Facilitator will record your results for the indicated tasks in the table below.**

Please insert a mark and a % for tests and if the task is a role play or evidence submission, please indicate RM (Requirements Met) or RNYM (Requirements Not Yet Met)

Name of Learning Programme or Unit Standards: 118043: SUPERVISE STOCK COUNTS

|  |  |  |
| --- | --- | --- |
| **LEARNER NAME AND SURNAME** | **KNOWLEDGE**  **TEST …./40** |  |
|  |  |  |
| ***Mark in %*** |  | |

|  |  |
| --- | --- |
| **FACILITATOR NAME AND SURNAME:** |  |
| **FACILITATOR SIGNATURE:** |  |
| **FACILITATOR COMMENT:** |  |
| **ASSESSOR NAME AND SURNAME:** |  |
| **ASSESSOR SIGNATURE:** |  |
| **ASSESSOR COMMENT** |  |
| **ASSESSOR SIGN OFF DATE:** |  |

|  |  |  |  |  |  |
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| **LEARNER WORKBOOK CHECKLIST**  **Supervise stock counts: 118043** | | | | | |
| **Item** | **INDICATOR** | **LEARNER CHECK (****)** | **FACILITATOR CHECK: (****)** | **REQUIREMENTS**  **MET (YES OR NO. If NO, please indicate action)** | **EVIDENCE REQUIREMENTS** |
| 1 | LWBK Act 1 |  |  |  | Completed question |
| 2 | LWBK Act 2 |  |  |  | Completed memorandum |
|  | LWBK Act 3 |  |  |  | Completed table |
| 3 | LWBK Act 4 |  |  |  | Completed table |
|  | Group Act 1 |  |  |  | Completed questions |
| 4 | Group Act 2 |  |  |  | Completed questions |
|  | LWBK Act 5 |  |  |  | Completed questions and table |
|  | LWBK Act 6 |  |  |  | Completed questions and table |
|  | Please sign at the bottom of each checked column: |  |  |  |  |

## DECLARATION OF AUTHENTICITY OF EVIDENCE GATHERED FOR THE SUPERVISE STOCK COUNTS PORTFOLIO OF EVIDENCE

LEARNER NAME AND SURNAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

STORE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

UNIT STANDARDS: 118043

SUPERIOR NAME AND SURNAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DECLARATION:

I hereby declare that the PORTFOLIO Instrument with regard to the above mentioned Unit standards was compiled by me, the undersigned, and that an assessor explained the procedure to me prior to the instrument being given.

I declare that the Portfolio was done fairly and that I compiled and completed the documents without / with minimal assistance.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LEARNER

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ASSESSOR



**ACTIVITY 1**

ACKNOWLEDGEMENT (Signature) **POE TASK 1 (SO1 AC 1, AC 2, AC 3 AC 4)**

* 1. Why is it important for your organisation to have stock counts? Give at least 2 reasons.

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* 1. Obtain a copy of your organisations policy and procedures with regards to stock count Highlight: (a) the main areas in this policy and (b) the areas that affect your job the most in terms of stock take activities in your store.

* 1. Design a checklist that you can use to ensure that you have all the necessary stationary

and Equipment available for your store’s stock counts. You should list at least 5 items.

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| STATIONARY /EQUIPMENT ITEM | YES | NO |
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* 1. How does your store identify what stock needs to be counted at that particular stage (quarter, day or month etc.)?

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5.1 What indicators according to your organisations policy do you need to consider in preparation for a stock count?

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5.2 Indicate against each preparation indicator how the manager verifies that it has been done. For e.g. do a check on the store’s stock system, check written documentation, draw a report of the system etc.

Record the answers to the above questions in the following table:

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| --- | --- |
| STOCK COUNT PREPARATION INDICATOR | VERIFICATION METHOD |
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1. Explain what type of Stock Count system your store implements. Refer to the Operational types that were discussed in the Learner Guide: Perpetual, Periodic or combination of both types.

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1. Complete a flowchart to indicate the procedures for your store’s stock count system / procedure. It must speak to your organisations policies and procedures on stock count.

If your store does not have a documented system, draft the flowchart, in accordance to with what you actually do in the store before and during a stock count. E.g. flowchart:

Stock count procedures

Correct count of

stock

Incorrect Stock

count

Teams count

stock

Stock Count

Preparation

## (SO 2 AC2, 3)



**ACTIVITY**

**2**

**Evidence requirement:**

1. Retrieve from your own store evidence that stock count training has occurred in the last 612 months.
2. Write a summary to explain:
   1. how training needs for stock takes are identified in your store
   2. how staff is allocated in your store for a stock count – insert a copy of any evidence of staff allocation to stock count duties

**Stock take Checklists**

Before the stock take, develop a comprehensive checklist that identifies who will be responsible for what tasks. Nominate someone responsible to follow the procedures in your checklist. See if the procedure works successfully. If it does, use it in future stock takes.

## ACTIVITY 3 POE TASK 4 (SO3 AC 1, AC 2)

1. *Compile a checklist* in order to ensure that team members involved in the stock count are complying with the store’s stock count procedures. This checklist must also determine accuracy of stock counts. Compliance Indicators must be according to your store’s stock take procedure manual.

Therefore some of the indicators must relate to accuracy such as:

*All required stock is counted, stock counted within the timeframe given, counts were recorded according to procedure etc.*

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| **Procedure/Compliance Indicator** | **Complying** | **Non compliance** | **Action Plan for Non-Compliance** |
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| Team Member name and Surname | Signature |  |  |
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| Learner: |  |  |  |
| Coach/ Manager: |  |  |  |

 **Group Activity 1**

## (SO3 AC3)

In a group discuss the following points:

1. What actions are often taken by the supervisor with regards to stock count queries?

1. What exceptions do supervisors often have to make with regards to variations at a stock count?

The group needs to assign 1 learner to scribe. The notes need to be written on the flip chart and then transferred to each learner’s Learner Workbook.

1. Use the key notes(flip chart notes) that have been gathered during the discussion to write a short paragraph to answer both the questions that were discussed. **This point you have to do as an individual as it will be assessed as part of your Portfolio.**

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## Group Activity 2 (SO4 AC1)

In a group discuss:

1. What post (after) stock count duties take place at your store?

The group needs to assign 1 learner to scribe. The notes need to be written on the flip chart.

1. Use the key notes (flip chart notes) that have been gathered during the discussion to write a short paragraph to answer the question that was discussed. This point needs to be done by you as an individual fro your Portfolio.

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## (SO4 AC 1, AC 2, AC 3)



**ACTIVI**

**TY**

**4**

1. Using your store’s policies and procedures, identify what your stores procedures are for post (after) stock count administration.

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1. Compile a checklist that can be implemented in your store in order to verify that post stock count procedures have been implemented. Indicators must be in line with your store’s stock count procedure manual.

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| **Post stock count procedures** | **Completed** | **Not completed** | **Action Plan** |
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| Coach/ Manager’s Name and Surname: |  | Date: | Signature: |
| Learner Signature: |  |  |  |

## (SO 4 AC 3)



**ACTIVITY**

**5**

1. Retrieve the Report of a recent stock count **at your store**. Analyse the report and identify the shortcomings for:

a. the preparation of the count

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b. the count process

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# KNOWLEDGE TEST

**TOTAL: 45**

1. What is a stock count?

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1. Name 5 pieces of stationery and/or equipment that is usually needed for a stock count (5)

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1. Why is it important to time a stock count correctly? (3)

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1. Complete the diagram of the duties for stock count. (10)

DUTIES OF

A STOCK

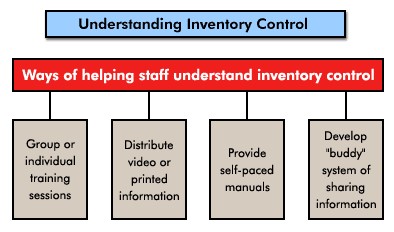
COUNT

1. Why is it important to train staff for stock counts? (3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Name 4 ways of helping staff understand inventory control? (4)



1. Name six tasks of a supervisor during a stock count. (6)

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1. What information about a product does a typical stock take record include? (3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Name 4 potential risks or things that can go wrong in a stock count. (4)

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1. List the 3 post stock count administration requirements (3)

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1. List two compliance indicators that staff must adhere to during a stock take (2)

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## Total: \_\_\_\_\_\_\_\_\_ / 45

**Facilitator comment/remediation required:**

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Learner Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Facilitator Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

## *PARTICIPANTS*

