Operational checklist

Inventory & Transition Readiness Checklist

A practical starting point for planning an accountable inventory or property handover.

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Before the count

- Define the inventory population, locations, accountable records, cutoff date, and responsible personnel.
- Reconcile recent receipts, issues, transfers, and approved dispositions before generating count lists.
- Check asset identifiers, custody records, location data, and access arrangements.
- Establish independent recount rules and a process for documenting exceptions.

During execution

- Record asset identity, location, condition, and custody using the customer-approved method.
- Control movements during the count or maintain a transaction log for reconciliation.
- Separate not-found items, unexpected items, incorrect locations, and record discrepancies.
- Retain supporting evidence and route exceptions to the designated decision owner.

Reconciliation and acceptance

- Validate count results against the accountable system and supporting documentation.
- Document authorized adjustments, transfers, reinstatements, and disposition actions.
- Record unresolved exceptions, owners, due dates, and the escalation path.
- Obtain the required review and acceptance before closing the inventory or handover.

Continuity after handover

- Provide the accepted reconciliation package, exception log, and operating procedures.
- Confirm ongoing cycle-count responsibilities and reporting cadence.
- This checklist is a planning aid. Customer policy, contract terms, and applicable property procedures govern execution.