

Effective Inventory Management, Inc.

# **The Effective Inventory Management Workshop October 20-21, 2026**

**Crowne Plaza Indianapolis Airport  
2501 S. High School Rd.  
Indianapolis, IN 46241  
317-244-6861(front desk)**

*Finally, a Seminar that Identifies and Addresses Your Specific Inventory Issues  
because it Utilizes Your Organization's Own Data and Information*



Looking ahead to October 2026, we do not know where we will be in our recovery or in our dealing with evolving supply chain issues and inflation. Perhaps we will have challenges that we cannot imagine now. Jon and Matt will be updating the Workshop to address where the business world is in 2026, and discuss ways of dealing with challenges such as evolving supply chain disruptions, tariffs, inflation, and rising interest rates by adjusting forecast models and other replenishment parameters, etc.

**Registration includes:**

- A comprehensive two-day workshop where we will explore the concepts and strategies of inventory control and management. Multiple examples and case studies will be presented to show how organizations implanted best practices and maximized the productivity and profitability of their investment in inventory.
- You can confidentially use data from your own organization in forecasting and analysis spreadsheets developed by *EIM* to conduct “what-if” scenarios to illustrate the concepts and principles presented. Prior to the seminar, you will send us your data (according to the template we will provide). The data will be examined, ranked, and prepared for your use in the workshop. If you choose not to use your own data, a sample data base will be provided.
- A copy of *Achieving Effective Inventory Management*, 7<sup>th</sup> ed.
- A copy of all the Power Point slides used in the workshop bound in a 3-to-a-page syllabus so you can follow along and take notes.
- The spreadsheets used in the seminar (along with detailed instructions) so you can perform this same analysis on your own inventory data.
- a half hour web session with Jon to help you individualize and implement your plan to achieve effective inventory management in your company.
- Continental breakfast and hot lunch both days
- Wireless, high-speed internet access in the meeting room
- Complimentary transportation to and from the Crowne Plaza and Indianapolis Airport

**Learning Objectives:**

Best of all, as we proceed through the session, you will develop step-by-step instructions necessary to develop and maintain an effective inventory management program for your company as you achieve the following learning objectives:

- Measure the productivity and profitability of your investment in inventory.
- Identify products that are not contributing to your overall inventory-related goals and might be candidates for liquidation.
- Identify and analyze possible unusual sales or usage.
- Recognize the specific components necessary to develop a meaningful forecast of future demand for each stocked product. During this segment, we will look at several popular methods of forecasting to determine the “best” method for your inventory.
- Measure and improve forecast accuracy.
- State how promotions, environmental factors and special products can be incorporated into a forecast.
- Decide whether it is better to buy from a vendor, transfer from a central warehouse or assemble a product in house.

- State the effect that longer and shorter lead times have on your total inventory investment and the service you provide your customers.
- Decide on the “right” amount of safety stock or reserve inventory for each item to balance customer service and profitability as well as several methods for determining this quantity.
- Determine how often you should issue replenishment orders for each source of supply (especially when vendors offer different terms for different sized orders, or you have to decide between several vendors)
- Identify the best replenishment parameters and reorder quantity for each stocked item.
- Determine optimal inventory for each product (expressed as an average monetary amount and number of days’ supply) compared to your current inventory.
- Identify how much excess inventory your suppliers are forcing you to carry.
- Determine when it is in your best interest to take advantage of special discounts, payment terms or other incentives.
- State how changing your business objectives will affect inventory performance.
- Implement a simple way to determine what product or vendor lines need the most attention from a buyer.
- Implement the best “total performance” measurements for your investment in inventory.

**Because we are dealing with your data and “live” software, we will perform a lot of “what if” analyses and you will discover how making small adjustments to your current practices can result in big improvements.** Best of all you will discover your organization’s unique potential because you can confidentially perform all analysis with your own data!

As we proceed through the course, you will develop a list of action items to complete in the upcoming several months. During the last segment of the course, *we will organize these action items into a comprehensive plan to achieve effective inventory management.*

*Jon and Matt will be updating the Workshop as we move from the March 2026 Workshop to October 2026, to address where the business world is in October. They will discuss ways of dealing with challenges such as supply chain disruptions, adjusting forecast models and other replenishment parameters.*

**To achieve maximum benefit from the course, all participants should bring a laptop equipped with Excel® software. Participants, who wish to confidentially use their own company data, should submit their data to *EIM* by **October 6, 2025**, before the workshop. A template for the data we will use in the seminar will be emailed upon registration. Your data will be checked for validation, ranked, and loaded onto our *EIM* Spreadsheets or your custom *EIM* spreadsheets. You will receive the ranked files 2 days before the workshop begins via a secure Dropbox in email. For those participants who cannot obtain the necessary data from their organizations, a sample data base will be supplied.**

## **Who Will Teach the Course?**

Matt Schreibfeder has recently been named President and CEO of Effective Inventory Management, Inc., a firm dedicated to helping manufacturers, distributors, and retailers get the most out of their investment in stock inventory. Matt came to *EIM* after extensive experience as a project analyst at Exxon Mobil. Before that Matt served as a nuclear submarine officer in the U.S. Navy. Matt earned a Bachelor's degree in Mechanical Engineering from Virginia Military Institute and a Master's degree in Engineering Management from Old Dominion University. A featured speaker at conventions and seminars, Matt has been instrumental in enhancing the functionality of our *EIM* spreadsheets and in developing new inventory forecasting and analysis models. Matt excels in developing customized inventory planning and analysis models for *EIM* clients. He is also co-author, with Jon, of the recently published *Achieving Effective Inventory Management – 7<sup>th</sup> Edition*.

Jon Schreibfeder is the founder of Effective Inventory Management, Inc. (*EIM*) in April of 1996. Over the past 45 years, Jon has helped over 3,000 firms improve their productivity and profitability through better inventory management. He is the author of numerous articles and a series of books on effective inventory management including, with Matt, the recently published *Achieving Effective Inventory Management – 7<sup>th</sup> Edition* and the National Association of Wholesale Distributor's *Guess Right - Best Practices in Demand Forecasting for Distributors*. A featured speaker at seminars and conventions throughout North America and around the globe, Jon has been awarded the title "Subject Matter Expert" in inventory management by the American Productivity and Quality Center. STAFDA has endorsed Jon as their Inventory Consultant since 2006. Jon is a faculty member of the University of Innovative Distribution and is also on the Board of Advisors of Inspiring Better Business, a mission organization dedicated to training, encouraging and advising people who want to become entrepreneurs in developing countries. Jon remains active helping *EIM* clients achieve effective inventory management.

## **Quotes from recent *EIM* seminar attendees:**

*(Names, companies and phone numbers provided on request. Call EIM at (972) 304 3325 or email [info@effectiveinventory.com](mailto:info@effectiveinventory.com))*

"This course gave me ideas I can implement immediately and gain immediate results."

"The best seminar I have ever attended!"

"The instructor displayed a sound proficiency in the subject matter and was able to teach it effectively."

"Your upbeat teaching style kept our whole class on their toes. Definitely recommend this seminar to any company looking to get a handle on their inventory"

# Agenda

## Effective Inventory Management Workshop

### October 20-21, 2026

**Place:** Crowne Plaza Indianapolis Airport  
2501 S. High School Rd.  
Indianapolis, IN 46241  
317-244-6861

**Time:** Tues. Oct. 20: 8:30am – 4:30pm (check-in and continental breakfast start at 7:30AM; lunch 12 – 1PM; breaks: 10 – 10:20 AM, 2:15 – 2:30 PM, and 3:30-3:40PM)  
Wed. Oct. 21: 8:00am – 3:30pm (continental breakfast starts at 7:30AM; lunch 11:30– 12:30 PM; breaks 9:15 – 9:30, 10:30 – 10:45 AM and 1:45 – 2:00 PM)

Total instruction: 720 minutes = 14 hours for attendance

**Dress:** Business casual; bring sweater/jacket for your comfort

Jon and Matt will be updating the Workshop as we move into October 2026, to address where the business world is at this point. We will discuss ways of dealing with challenges such as supply chain disruptions, adjusting forecast models and other replenishment parameters caused by the evolving supply chain issues, inflation, rising interest rates, etc.

- **#1 – What Should You Stock?**
  - Goal of effective inventory management
  - Responsibilities of different departments in achieving effective inventory management
  - Different types of inventory:
    - Resale
    - Production
    - Maintenance, repairs and operations (MRO)
  - Determining what products to stock in each warehouse or store
  - Ranking products by activity, cost of goods sold and profitability
  - Resale Inventory – Ensuring that all inventory is profitable or leads to other profitable sales
  - MRO Inventory – Determining the “critical nature” of each item

- **#2 – Best Practice Forecasting #1**
  - The difference between dependent and independent demand
  - Forecasting new stock items
  - Determining how to stock products with sporadic usage activity
  - Defining the six elements of an accurate forecast
  - Understanding the difference between sales, shipments and usage
  - Verifying that usage is correctly recorded
  - Identifying and correcting for unusual usage activity
  - How events and other factors can affect a forecast
  
- **#3 – Best Practice Forecasting #2**
  - Common forecasting methods and where each should be utilized
  - Measuring the accuracy of your forecast
  - Collaborative information from customers and sales people (CPFR)
  - Building a cooperative environment throughout your supply chain
  - Different types of seasonality and trends
  - The appropriate forecast horizon
  - The effect of inaccurate forecasts on the entire supply chain
  
- **#4 – Determining When to Replenish Stock (Achieving Your Customer Service Goals)**
  - Calculating accurate replenishment parameters
  - Minimum/Maximum quantities
  - Order points, reorder points and line points
  - The difference between average lead times and anticipated lead times
  - Different methods for calculating safety stock quantities
  - Using safety stock to balance customer service with your investment in stock inventory
  - Order up to and flow point replenishment
  
- **#5 – Determining How Much To Order (Maximizing Profitability or Minimizing Costs)**
  - Economic order quantities
  - Purchasing when presented with price breaks
  - Evaluating rebate offers
  - Buying before a price increase
  - How space, money and product life limits affect purchasing decisions
  - Determining your ideal inventory investment and potential turnover
  
- **#6 – Implementing an Effective Replenishment Operation**
  - Setting up a multi-location supply network (assemble, transfer or buy)
  - Distribution requirements planning (buying into the future, importing and container maximization)

- Materials requirements planning (acquiring raw materials and components just in time to complete an assembly or project)
- Best practice purchasing policies and procedures
- #7 – **Benchmark metrics – Analyzing your progress**
  - Fill rate, customer service level and stockouts
  - Vendor analysis
  - What inventory turnover really tells you
  - Turn/earn index and gross margin return on investment
  - Excess stock and dead inventory
- #8 – **Utilizing all the tools and techniques presented in the seminar, developing a plan for your organization to achieve effective inventory management**

**Refund Policy: Full** refund up to 30 days prior to seminar. 50% refund granted if cancellation notice received 14-30 days prior to seminar. No refund within 14 days of the seminar date. Substitutions are allowed at any time, but please notify us at 972-304-3325.  
Please direct any complaints to Megan at (tel) 972-304-3325.

**Seminar administered by Effective Inventory Management, Inc.  
(tel) 972-304-3325**

**This course awards 14 hours for attendance**

**CONTINUED ON NEXT PAGE**

**\*\*Room Block Reservations at:  
Crowne Plaza Indianapolis Airport\*\***

**Reservations must be made on or before September 19, 2026**, to receive the group rate of **\$134/night**. Reservations must be made by the individual by calling 1-800-2-CROWNE. Please identify yourself as being with the Effective Inventory Management (*EIM*) Workshop Group Code: EFH at the time the reservation is made. You are responsible for your sleeping room charges and any additional personal charges.

Check-in is after 4:00PM. Check-out is by 12:00PM

**Register today!** You can register online at [www.EffectiveInventory.com](http://www.EffectiveInventory.com) at the [EIM Store page](#), or you can print out the registration form found on the next page and either scan it and email it to [megans@effectiveinventory.com](mailto:megans@effectiveinventory.com) or print out and mail the completed registration form to...

Effective Inventory Management, Inc.  
13398 Tegler Dr.  
Ste. 120 #115  
Noblesville, IN 46060-4969

**Registration Form On Next Page**

## REGISTRATION FORM

### The Effective Inventory Management Workshop

*The EIM Workshop*

October 20-21, 2026

Crowne Plaza Indianapolis Airport

Indianapolis, IN 46241

Name: \_\_\_\_\_ Job title \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Email: \_\_\_\_\_

**Registration fee: \$950 per person**

**Early-bird Special:** Register by **October 6<sup>th</sup>** for **\$875** per person!

**Includes:** \*2-day seminar with course syllabus

\*Your data ranked and prepared for your use in the workshop

\*Continental breakfast, hot lunch, and refreshments both days

\*a copy of *Achieving Effective Inventory Management, 6th ed.*

\*a set of *EIM Version 5 Spreadsheets* to help you effectively analyze your inventory investment

\*Wireless, high-speed internet access in the meeting room

\*Syllabus which includes the PowerPoint slides used in the Workshop

\*a half hour web session with Jon or Matt to help you individualize and implement your plan to achieve effective inventory management in your company.

### Payment Information

**Check enclosed (payable to Effective Inventory Management, Inc.)**

The fee is due prior to the program.

**Purchase Order:** \_\_\_\_\_

**Mail to:**

Effective Inventory Mgmt., Inc.

MasterCard/VISA/AmEx

13398 Tegler Dr., Ste. 120 #115

Card # \_\_\_\_\_ Noblesville, IN 46060

**CALL 972-304-3325**

Exp. Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ CSC: \_\_\_\_\_

Email [megans@effectiveinventory.com](mailto:megans@effectiveinventory.com)

Cardholder's Name: \_\_\_\_\_

Card Billing Address: \_\_\_\_\_

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