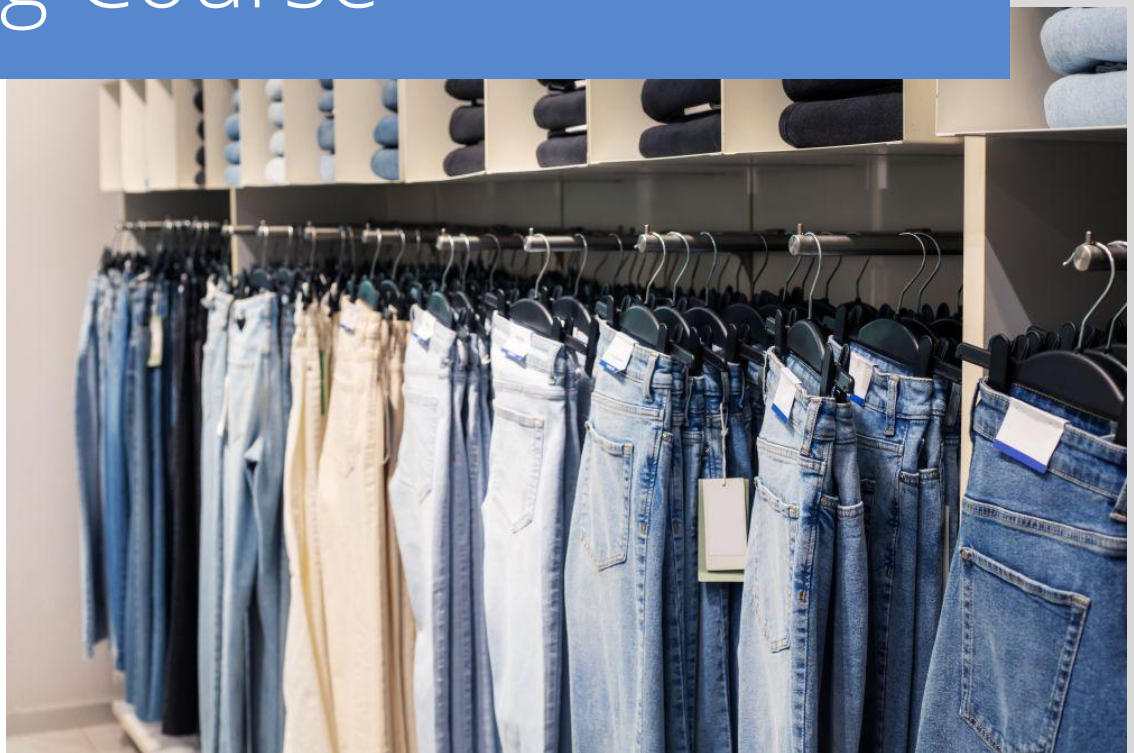




Merchandise Allocation E-learning Course



Martec International

Martec International is a leading provider of data, industry knowledge and insight on retailers, consumer goods companies and other suppliers to retail, especially technology companies.

Our customers include:

- Retailers
- Consumer Goods companies
- Technology suppliers to retailers and consumer goods companies
- Marketing services companies that promote services to retailers and consumer goods companies
- Other service providers, such as logistics companies.

We help clients increase their industry knowledge, develop their skills and grow sales. Companies from approximately 38 countries across 6 continents come to Martec for assistance and insight.

Target Audience

This program is designed for:

- Retail:
 - Senior Merchandisers, Merchandisers, Assistant Merchandisers, Allocators, and Supply Chain Managers
 - IT staff supporting merchandising systems
- Consumer Goods:
 - Category Management teams
 - Retailer account managers involved in inventory management
- Consultants, Systems Integrators, and Retail Software Providers:
 - Professionals engaged in inventory, allocation, and merchandising projects

Objectives of the Suite

The course provides a thorough grounding in allocation and replenishment principles and concepts. It is suitable for retailers operating in both category management and merchandise management environments. By the end of the program students will be able to do the following:

- Explain the theory, principles and practice of allocation and replenishment
- Describe best practice allocation and replenishment
- Have a good understanding of which allocation and replenishment methods are most effective in which situations.

Course Overview

- This module provides a comprehensive introduction to the key principles and concepts of allocation and its role in effective inventory management. The course explores the purpose of both allocation and replenishment, how they work together, and when each approach should be used. It also examines the details of different allocation algorithms, common allocation strategies, and how to manage more complex allocation scenarios.
- The program includes a variety of interest generating features and exercises. The student sees his or her own test scores immediately and can review explanations for the correct answers, as appropriate.
- Companies who buy a group of licences will be given access to the reporting facilities in the Learning Management System. This enables management to track which students have started and completed the training and their test scores.

There are three pricing options:

- Professional is suited to new joiners who will complete the complete training suite in a limited time. An induction licence is valid for 3 months. It also includes access to the complete Retail and Consumer Goods Industry Knowledge for a 12 month licence.
- Performance Enhancer is valid for 12 months. This allows those who need to re-visit the classes periodically to refresh their knowledge to do so whenever necessary. It also includes access to the complete Retail and Consumer Goods Industry Knowledge for a 12 month licence.

You can get a full explanation of the benefits and what is included in each option as explained in our [class pricing options](#) web page.

All a student needs to run the program is access to a PC and a web browser. The program is hosted on Martec International's Learning Management System and is available round the clock.

Companies may also purchase a corporate licence which provides unlimited access within the company's own organization. Prices are available on request.

CPE Credits

If you are a CPA licensed in the United States you may be eligible for Continuing Professional Education Credit for this course which is 2.2 CPE Credits.



Program Contents

Introduction to Allocation

- Allocation vs. Replenishment
- Allocation and Replenishment across the product lifecycle
- Allocation applications

Allocation Algorithms - New Products

- Planning initial allocations for new products
- Initial allocation quantity
- Initial allocation - Merchandise Management
- Initial allocation - Category Management
 - Optimizing initial allocation and reserve stock
- Pack size implications on allocation strategy
 - Import and distribution packaging
 - Solid packs vs. ratio packs
 - Aligning ratio packs with demand
 - Operational aspects
 - Rounding rules

Allocation Algorithms - In Season

- Allocations reflecting inventory
- Adapting participation metrics to sales trends
- Promotions
- Rounding rules
- Last year's sales
- Unit sales
- Weeks of supply (WOS)
- Replenishment base model

Merchandise Allocation v4.5

RESOURCES ASK AN EXPERT CONTACT START OF COURSE EXIT CERTIFICATE

Initial Allocation Quantity

1. The Quantity required to support sales until replenishment is available

EXAMPLE

Cycle Time	4 weeks
Average Demand	25 items/week
Expected Sales (4 x 25)	100 units
Safety Stock	2 weeks (50 units)
Weeks Cover (4 + 2)	6 weeks
Calculation	25 x 6
Quantity Required	150

MIN = Average Demand(Day/Week) × Cycle Time (+ Safety Stock)

1. Calculate Cycle Time
2. Forecast Expected Demand over the Cycle Time
3. Add a Safety Stock
4. Multiply Rate of Sale by Total Weeks Cover

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RESOURCES ASK AN EXPERT CONTACT START OF COURSE EXIT CERTIFICATE

Unit Sales

Store	Sales Contribution % This Year	Unit Sales Year To Date	Unit Sales Last Year Year To Date	Sales 4 Weeks Ago	Sales 3 Weeks Ago	Sales 2 Weeks Ago	Sales Last Week	Trend Last 4 Weeks vs LY	Weeks of Supply
1	40%	592	473	26	31	36	44	+9%	6.2
2	25%	370	416	12	18	21	19	-10%	11.7
3	20%	296	332	13	9	16	18	-10%	15.0
4	15%	222	166	8	11	10	15	-6%	19.0
All	100%	1480	1387	59	69	83	96	-1.5%	13.0

Store 1 for this year is 40% of the sales contribution

Last year Store 1 was 34%
Store unit sales divided by Total Sales
473 ÷ 1387

This year to date, Store 1 has sold +25% in unit sales

This years Unit sales - Last years unit sales ÷ last years unit sales
(592 - 473) ÷ 473

The total increase across all stores was only +6.7%

This years total sales - Last years total sales ÷ last years unit sales
(1480 - 1387) ÷ 1387

This may indicate Store 1 has the potential to sell even more than it has this year to date

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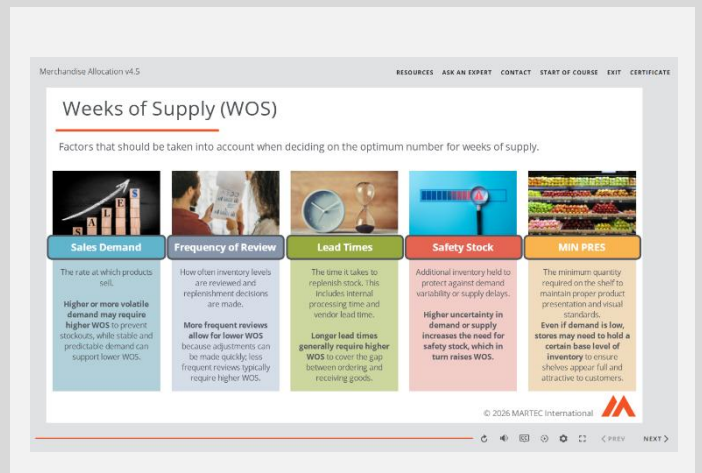
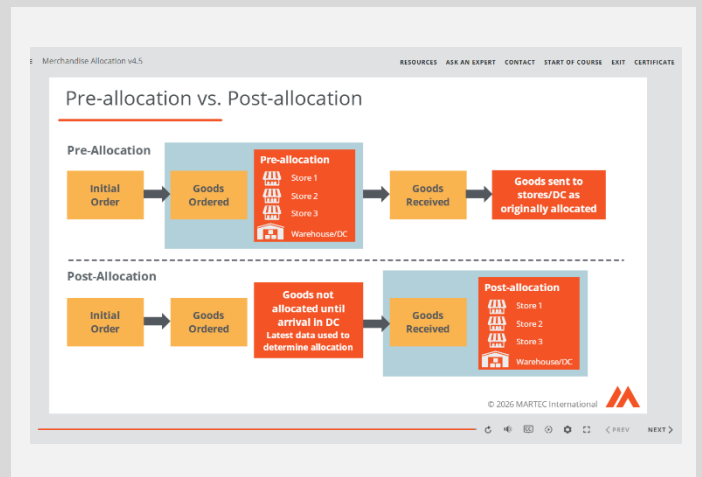


Program Contents

Allocation Strategies

- Common strategies for order allocation
- Pre-allocation vs. post-allocation
- Combining Pre- and Post-Allocation for Optimal Order Management
- Style vs. collection
- Proportional Allocation
- Seasonal vs. Basic
- Calculating Weeks of Supply (WOS)
- Weeks of Supply - Retailer's Lead Time
- Weeks of Supply - Vendor's Lead Time
- Weeks of Supply - Safety Stock

Mastery test



Testing

At the end of each module there is a mastery test. If the learner completes this test with a pass mark of 70% or more and also completes our short class survey, they will be issued with a certificate.

Delivery Options

This program can be delivered in two ways:

- Individuals or companies can order the program for one or more people via the Martec International web site at www.martec-international.com.
- If a company wants to train batches of students, the e-learning program can be studied to a group time schedule and live web-based instructor-led sessions can be provided to allow for interaction with a subject matter expert. There is an extra charge for this for smaller size groups.

Further information and pricing can be provided on request.

More Information

You can learn more about Martec at the following locations:

<https://www.martec-international.com>

Our YouTube channel at <https://www.youtube.com/channel/UCy9AbJlSWOIOJitqjqWZsDA>.

If you have an enquiry you would like to make of Martec, you can use the Enquire Further button on <https://www.martec-international.com/contact-us> or call +44 1823 333469.