WAREHOUSE MEETING WORKING FORM

Meeting with Cathy - 22 July 2026

Meeting date:		**Time:**	
Present:	Derek and Cathy	**Next review:**	

Purpose: a practical discussion to confirm that warehouse work is running properly, identify anything causing delay or extra work, and agree any actions needed. This is not a formal ISO management review.

1. GENERAL POSITION AND WORKLOAD

The report shows a mature warehouse control environment with no overdue rolling tasks at report level. The main aim today is to confirm whether that picture matches day-to-day reality.

Is the warehouse currently working as it should?

■ Yes ■ Mostly ■ No

What is causing the most delay, repeated effort or frustration at present?

Is the workload manageable, including holiday cover and unexpected urgent jobs?

■ Yes ■ Needs attention

Is anything waiting for Derek, Steve, the office, sales or another department before it can move forward?

2. REPAIRS READY FOR QUOTE OR INVOICE

The report contains recurring activity for repairs ready for quotation and invoicing. Some items may remain shown as outstanding after paperwork has been passed to the office, so ownership of the next step needs to be clear.

Are any repairs waiting for a quotation, customer approval, paperwork check or invoice?

When paperwork is passed to the office, is it clear who owns the next action?

■ Yes ■ Sometimes ■ No

Are any jobs shown as outstanding even though the warehouse part is complete?

Are there recurring reasons why repair jobs are delayed or returned for more information?

3. SUPPLIER RETURNS, CREDITS AND REPLACEMENTS

The report identifies supplier-return management as a strong control area, but Teledyne return tasks have sometimes taken a long time and one recent review was shown as outstanding. The practical check is whether anything is physically waiting without a clear next action.

Are any Teledyne or other supplier returns waiting for an RMA, credit, replacement or decision?

Is anything sitting on a returns or quarantine shelf without a named owner and next action?

Are all supplier credits and replacements being followed through to completion?

■ Yes ■ Need checking

Is there anything we should chase today?

4. CALIBRATION EQUIPMENT

Calibration controls are reported as strong and the Calibration Index is current. Recent records mention equipment being with Cathy or away for calibration, including a frequency generator and pressure gauge.

What calibration equipment is currently with us, away, awaiting repair or awaiting return?

Is any missing or unavailable equipment affecting normal work?

■ No ■ Yes

Can everyone easily identify what may be used, what is away and what must not be used?

■ Yes ■ Needs improvement

Are all returned items labelled and recorded correctly?

■ Yes ■ Need checking

5. EXPIRY-DATED, QUARANTINED OR DAMAGED STOCK

Expiry-date checks are being completed regularly, with expired stock marked or quarantined. Confirm that there are no unresolved items and that older stock is being used first where appropriate.

Is there any expired, short-dated, damaged, rejected or quarantined stock awaiting a decision?

Are older batches being used before newer batches where appropriate?

- Yes
- Need checking

Have any products arrived with less remaining shelf life than expected?

- No
- Yes

Does any stock need relabelling, disposal, supplier return or management approval?

6. STOCK LEVELS AND SUPPLY

The report includes recurring supplier stock reviews and warehouse picking controls. The practical focus is shortages, excess stock, slow-moving stock and supplier lead times.

Which stock lines are getting uncomfortably low or may run out before replacement stock arrives?

Is there any excess, slow-moving or obsolete stock taking up useful space?

Are reserve quantities still suitable for customers who place larger or irregular orders?

Are any supplier lead times, back orders or shortages likely to affect customers?

7. GOODS IN, STORAGE AND STOCK STATUS

The warehouse review covers goods receipt, stock identification, storage, rejected and quarantined stock, and traceability. Check for practical backlogs or unclear stock status.

Is anything waiting to be booked in, inspected, decontaminated, labelled or put away?

Is any stock stored in the wrong location or difficult to find?

Are QA, quarantine, rejected and available stock areas clearly separated and understood?

■ Yes ■ Needs attention

Are there any space, shelving, access or housekeeping problems?

8. PICKING, PRIORITIES AND ORDER CHANGES

Picking controls are described as one of the strongest areas. Confirm that priorities remain clear and that late changes do not create avoidable repacking or mistakes.

Are picking priorities clear, including urgent jobs and orders waiting for stock?

■ Yes ■ Sometimes ■ No

Are orders being changed after picking in a way that causes repeated work or confusion?

Are any stock locations, picking lists or system notes unclear or inaccurate?

What change would make picking faster or less error-prone?

9. DISPATCH AND COMMUNICATION WITH THE OFFICE

The report covers dispatch and product-control activities. Recent operational work has included changed carriage instructions, delivery addresses and order notes, so the handover from office to warehouse should be checked.

Are delivery addresses, carriage methods, Incoterms and customer notes clear when an order reaches the warehouse?

Are late changes causing repacking, duplicated work or risk of sending the wrong paperwork?

Are there recurring order-entry mistakes the office or sales team should correct?

Are any completed orders waiting unnecessarily for information, approval or collection?

10. EQUIPMENT, SYSTEMS, HOUSEKEEPING AND SAFETY

The report indicates that operational controls are in regular use. This section confirms whether the physical warehouse and supporting systems are actually suitable today.

Are pallet trucks, ladders, printers, scanners, label printers and other equipment working properly?

Are packaging materials and labels available in the quantities needed?

■ Yes ■ Need ordering

Are floors, fire routes, storage areas and workspaces clear and safe?

■ Yes ■ Needs action

Are there any manual-handling, damaged shelving, leak, trip, cylinder-storage or other safety concerns?

Are any Intrastats pages, reports or system steps causing problems?

11. COVER, TRAINING AND DEPENDENCIES

The report's main wider concern is dependency on Derek across many processes. This is not an ISO exercise today, but it is useful to identify anything that only one person knows how to do.

Which warehouse tasks currently depend on only one person knowing what to do?

Is there anything you need more training, access, authority or written guidance for?

Could normal warehouse work continue if Derek or another key person were unavailable for a week?

■ Yes ■ Partly ■ No

What should be cross-trained or documented first?

12. IMPROVEMENTS AND OPEN DISCUSSION

The report concludes that warehouse systems are genuinely used in practice, with recurring physical checks, shelf reviews, priority checks, returns management and calibration monitoring. Use this final section to capture improvements that matter operationally.

What is the one change that would make the warehouse work more smoothly?

Is there anything you keep having to work around instead of the system working properly?

Has anything previously raised still not been resolved?

Is there anything else we need to discuss today?

ACTIONS AGREED

Action	Owner	Target date	Completed

OVERALL POSITION AT END OF MEETING

■ Everything working satisfactorily ■ Minor actions agreed ■ Significant follow-up needed

Derek: ______________________ **Cathy:** ______________________

Date: ______________________ **Date:** ______________________