Accredited Africa Training Institute for Capacity Development
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COURSE BROCHURE

Manage Financial Performance of Merchandise Range

Services / Wholesale and Retail

Unit Standard 252270 · NQF Level 5 · 15 Credits · 12 Days

COURSE OVERVIEW

This course equips learners with the skills to effectively manage the financial performance of a merchandise range. Participants will learn to analyze financial data, interpret key performance indicators, and make strategic decisions to optimize profitability and inventory turnover.

Category	Services
Subfield	Wholesale and Retail
Unit Standard	252270
Accreditation	SAQA Accredited · NQF Level 5 · 15 Credits
Duration	12 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS — verifiable online

LEARNING OUTCOMES

- Analyze financial reports to assess the performance of a merchandise range.
- Apply key performance indicators (KPIs) such as gross margin, sell-through rate, and stock turn to evaluate profitability.
- Evaluate pricing strategies and their impact on financial performance.
- Implement corrective actions to improve underperforming merchandise ranges.
- Demonstrate the use of financial tools to forecast sales and manage inventory levels.
- Interpret variance analysis to identify trends and recommend improvements.

WHO SHOULD ATTEND

- This course is designed for retail managers, merchandise planners, buyers, and financial analysts responsible for overseeing the financial health of product ranges within retail or wholesale environments.

COURSE OUTLINE

Day 1: Introduction to Merchandise Range Management

- Definition and scope of merchandise range management
- Retail environment and competitive landscape
- Key financial terms: revenue, cost of goods sold, gross margin
- Stakeholders: buyers, merchandisers, finance, suppliers
- Overview of the merchandise planning cycle

Day 2: Financial Statements and Key Performance Indicators

- Income statement and balance sheet basics for retail
- KPIs: gross margin return on investment (GMROI), sell-through rate
- Markdown percentage and its effect on profitability
- Stock turn and weeks of supply
- Case study: KPI analysis of a sample range

Day 3: Demand Forecasting and Sales Planning

- Forecasting techniques: moving averages, exponential smoothing
- Qualitative inputs: market trends, buyer insights
- Sales planning process and timelines
- Seasonality indices and promotional calendars
- Forecasting exercise with real data

Day 4: Budgeting and Financial Planning for Merchandise Ranges

- Components of a merchandise budget
- OTB calculation and management
- Budget allocation: by category, by store, by channel
- Variance analysis: actual vs. budget
- Budgeting software and tools overview

Day 5: Inventory Management and Stock Optimisation

- Inventory costing methods: FIFO, weighted average
- Stock turnover ratio and days inventory outstanding
- ABC analysis for prioritising SKUs
- Safety stock and reorder point calculations
- Case study: inventory optimisation for a fashion range

Day 6: Pricing Strategies and Markdown Management

- Pricing models: cost-plus, value-based, competitive
- Price elasticity and demand curves
- Markdown timing and depth strategies
- Impact of markdowns on gross margin and sell-through
- Markdown optimisation software demonstration

Day 7: Supplier Negotiation and Cost Management

- Negotiation tactics for price, terms, and rebates
- Total cost of ownership: freight, duties, warehousing
- Supplier scorecards and performance metrics
- Cost reduction strategies: consolidation, direct sourcing

- Role-play negotiation exercise

Day 8: Financial Analysis of Range Performance

- Contribution margin and DPP calculations
- Profitability by channel and customer segment
- Break-even analysis for new lines
- Product lifecycle analysis and financial implications
- Reporting dashboards and visualisation

Day 9: Risk Management and Compliance in Merchandise Finance

- Types of financial risk: credit, market, operational
- Shrinkage prevention and inventory audits
- IFRS implications for inventory valuation
- Hedging strategies for currency fluctuations
- Business continuity planning

Day 10: Technology and Systems for Financial Management

- Overview of retail ERP systems (SAP, Oracle, Microsoft Dynamics
- Business intelligence tools for merchandise analytics
- POS data and its role in financial reporting
- Automation of OTB and budgeting
- Vendor selection criteria

Day 11: Strategic Range Review and Optimisation

- Range review frameworks: BCG matrix, product life cycle
- SKU rationalisation and its financial impact
- New product introduction financial assessment
- Balancing breadth vs. depth in range
- Case study: range optimisation for a retailer

Day 12: Integration, Assessment, and Action Plan

- Final project presentations and peer feedback
- Action planning: applying learning to workplace
- Assessment preparation: case studies and calculations
- Review of key formulas and concepts
- Course evaluation and certification

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **15 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 43,000.00	**R 43,000.00**
1	In-House	R 56,000.00	**R 56,000.00**
1	On-Campus (Pretoria)	R 64,600.00	**R 64,600.00**

UPCOMING SESSIONS

Start	End	Method	Venue
06 Aug 2026	21 Aug 2026	On-Campus	Mauritius
07 Aug 2026	24 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	25 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	26 Aug 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	27 Aug 2026	On-Campus	Durban, South Africa
12 Aug 2026	27 Aug 2026	On-Campus	Mauritius
13 Aug 2026	28 Aug 2026	On-Campus	Cape Town, South Africa
14 Aug 2026	31 Aug 2026	On-Campus	Dubai, UAE

Contact us if no suitable date is listed — on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit **www.aaticd.co.za**, open the page for this course (Unit Standard 252270) and click **Get A Quote / Apply**. Select your training method and number of delegates — your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to **apply@aaticd.co.za** — our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically — the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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