

Worksheet: Inventory Management Planning

This worksheet is included in Chapter 6, “Creating an Artwork Inventory” of [Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide, 2022](#).

The following planning templates will walk you through the steps of planning out your needs for an inventory management system. Your plan may evolve as your studio needs progress. However, establishing a well-documented plan will allow you to quickly pivot and adjust any moving parts as needed.

1. Establish Your Inventory Management System Criteria

What is most important for you and your studio? Use the template below to establish your wish list.

Suggested Database Selection Criteria May Include:		Your Criteria:
<ul style="list-style-type: none"> » Training and support available » Skill set of staff » Number of simultaneous users » Inventory artwork capacity/limitations » Online vs. browser-based software » Compatibility with your computer's operating system » Customizable, to what extent 	<ul style="list-style-type: none"> » Art world–experienced founders » Operating history » Compelling mission » Data migration services » Positive reviews from peer artists » Provides tables for the following categories of information: artworks, exhibition history, contacts 	

2. Evaluate Your Top Three Systems

Google search “art inventory software for artists” to retrieve the most current inventory management database software recommended for artists. Using the criteria you identified above, select your top three systems and engage in the free trial to see if the system will meet your needs. Record the trial login information and systems below along with any concerns and questions you may have. Use your notes to engage with the vendor sales representatives before you decide on a product.

Your Top Three Systems	Trial Login Information	Notes
1.		
2.		
3.		

3. Identify Your Budget

A full view of your start-up and ongoing expenses as well as the time and resources required to implement and manage your inventory system will allow you to make an informed decision when choosing your inventory management software.

	Software & Hardware		Labor
	Initial fees	Ongoing fees	# assistant/consultant(s) + hours per week/rate
Inventory Management System (paper-based, Microsoft product, or database)	\$		X X = people hours rate
Developer (if custom built)	\$		X X = people hours rate
Data Migration	\$		X X = people hours rate
Training	\$		X X = people hours rate
External Hard Drive or Server	\$		X X = people hours rate
Cloud Storage Space	\$		X X = people hours rate
Laptop, Computer(s)	\$		X X = people hours rate
Total Costs	\$	\$	

4. Put It All Together: Draft Your Inventory Management Plan

Once you have identified what inventory management system you will be working with, think about how you will integrate inventory management practices into your studio routines.

Inventory Management Plan		
<p>How often will you update your inventory?</p>	<input type="checkbox"/> Every time I create a new body of work <input type="checkbox"/> Every exhibition cycle	<input type="checkbox"/> Once every three months <input type="checkbox"/> Other <hr/>
<p>Who will update the records?</p>	<input type="checkbox"/> Me <input type="checkbox"/> Assistant/associate (how many)	<input type="checkbox"/> Family member(s) <input type="checkbox"/> Other
<p>Project estimated budget <i>(refer to budget template on previous page)</i></p>	<p>Equipment & Supplies: Initial fees: _____ Ongoing fees: _____</p>	<p>Labor: [# of staff/consultant(s)] x [hours per week] x [estimated rate]:</p>

5. Assess

Adjust your workflow as needed, commit to following through with your inventory management goals, and revisit your plan as often as needed so that it is serving you.

Your Inventory Management System Should Be Able to Address the Questions Listed Below. Put Your System to the Test and Adjust as Needed.

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| <ul style="list-style-type: none"> » Do you have consistent information relating to your artworks in your inventory management system? (title, date, medium, dimensions) » Can you produce a report with the locations of all the artworks in your collection? » Do you know what artworks are currently on loan, consignment, exhibition? » Can you produce a checklist of works for each of your exhibitions? | <ul style="list-style-type: none"> » Are there artworks for which you don't have good photographic images/documentation? » Did you backup your database to a spreadsheet (CSV or Excel file)? » Have you made a copy of the database file and stored it on more than one device, in more than one location? |
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