

RETAIL · AREA AND DISTRICT MANAGERS

Retail store visit checklist

Use this on every store visit, so every store is checked on the same points and every problem leaves with an owner and a due date.

STORE / LOCATION	DATE	VISITED BY
STORE MANAGER ON DUTY	TIME IN / OUT	

Mark each item Pass, Fail or N/A. For every Fail, write the issue in the table at the end with an owner, a due date and a photo reference if it helps.

1 Before you walk in

#	ITEM	PASS	FAIL	N/A	NOTES
1	Open issues from the last visit are listed, so you can check each one on the floor.	☐	☐	☐	
2	Sales against target and traffic for the last four weeks have been reviewed.	☐	☐	☐	
3	This week's promotions, campaigns and deliveries are known.	☐	☐	☐	

2 Exterior and entrance

#	ITEM	PASS	FAIL	N/A	NOTES
4	Entrance, windows and exterior signs are clean, lit and undamaged.	☐	☐	☐	
5	The window display matches the current campaign brief.	☐	☐	☐	
6	Doors, mats and the approach to the store are safe and clear.	☐	☐	☐	

3 Sales floor

#	ITEM	PASS	FAIL	N/A	NOTES
7	Floors are clean and dry; no boxes or cages are left in aisles.	☐	☐	☐	
8	Shelves and fixtures are stocked, faced and dust-free.	☐	☐	☐	
9	Displays match the planogram or visual merchandising guide.	☐	☐	☐	
10	Promoted and featured products are in stock and easy to find.	☐	☐	☐	
11	Price labels match the system price on five sampled items. Write the items you checked in the notes.	☐	☐	☐	
12	Promotional signs are correct and expired signs are removed.	☐	☐	☐	
13	Fitting rooms and restrooms (if any) are clean and stocked.	☐	☐	☐	
14	The checkout area is tidy and the queue is within the store's limit. Write the limit, for example no more than three customers waiting.	☐	☐	☐	

4 Stockroom and receiving

#	ITEM	PASS	FAIL	N/A	NOTES
15	Stock is organized, labeled and off the floor.	☐	☐	☐	
16	Today's delivery has been checked and put away.	☐	☐	☐	
17	Aisles and exits in the back area are clear.	☐	☐	☐	
18	Cleaning products are stored safely and away from merchandise.	☐	☐	☐	

5 Team and customer service

#	ITEM	PASS	FAIL	N/A	NOTES
19	The team follows the dress code and wears name badges where used.	☐	☐	☐	
20	Customers are greeted and helped within the store's standard. Stand on the floor for ten minutes and watch.	☐	☐	☐	
21	There are enough people on the floor for the time of day.	☐	☐	☐	
22	The manager and two team members can explain this week's priorities.	☐	☐	☐	
23	Coaching or training needs have been noted for follow-up.	☐	☐	☐	

6 Safety and maintenance

#	ITEM	PASS	FAIL	N/A	NOTES
24	Fire exits are clear; extinguishers and the first-aid kit are accessible and in date. Check the dates on the tags.	☐	☐	☐	
25	Cables, ladders and trolleys are stored safely; no trip hazards.	☐	☐	☐	
26	Lighting, heating or cooling, and equipment work; faults have been reported.	☐	☐	☐	
27	Cameras and the alarm (if fitted) are working.	☐	☐	☐	

7 Wrap-up with the store manager

#	ITEM	PASS	FAIL	N/A	NOTES
28	What went well is named and shared with the team.	☐	☐	☐	
29	The top three priorities for the next visit are agreed.	☐	☐	☐	
30	Every Fail has an owner and a due date.	☐	☐	☐	
31	The next visit date is set.	☐	☐	☐	
32	Overall: how close is the store to your standard today? 1 = far from it, 5 = fully there.	☐	☐	☐	
33	Notes				

Issues to fix

#	ISSUE (WHAT AND WHERE)	OWNER	DUE DATE	PHOTO REF.	DONE
1					
2					
3					
4					
5					
6					
7					
8					

COMPLETED BY (NAME AND SIGNATURE)

REVIEWED BY (MANAGER)

DATE

Free to use inside your company. To share publicly, link to getbitreport.com/resources/templates/
A starting point, not legal advice. Adapt it to your stores, your procedures and the rules where you operate.