

RETAIL · AFTER EVERY VISIT

Store visit report template

One place to write up a store visit: what you saw, what needs fixing and who will fix it by when. Send it to the store manager while the visit is still fresh.

STORE / LOCATION	VISIT DATE	VISITED BY
VISIT TYPE	MET WITH	TIME IN / OUT

Fill in the ratings and notes while the visit is fresh. List every issue with an owner and a due date, then send the report to the store manager.

1 Store snapshot

#	ITEM	RATING (CIRCLE ONE)	NOTES
1	Store presentation and visual merchandising Rate 1 to 5: 1 = well below standard, 5 = at or above standard.	(1) (2) (3) (4) (5)	
2	Stock availability	(1) (2) (3) (4) (5)	
3	Pricing and promotion accuracy	(1) (2) (3) (4) (5)	
4	Cleanliness and safety	(1) (2) (3) (4) (5)	
5	Customer service and team	(1) (2) (3) (4) (5)	
6	Brand and campaign execution	(1) (2) (3) (4) (5)	
7	Overall	(1) (2) (3) (4) (5)	

2 Numbers for context

#	ITEM	ANSWER
8	Sales against target, last four weeks Value and percentage.	
9	Traffic and conversion, if tracked	
10	Staffing this week: planned hours and actual hours	

3 What went well

#	ITEM	ANSWER
11	Two or three things that went well Name the person or team where you can.	

4 Follow-up on the last visit

#	ITEM	ANSWER
12	Issue from the last visit and its status Done, partly done or not done.	
13	Issue from the last visit and its status Done, partly done or not done.	
14	Issue from the last visit and its status Done, partly done or not done.	

5 Coaching and support

#	ITEM	ANSWER
15	Coaching given during the visit Who and what.	
16	Support the store needs from the regional team or head office	

6 Next visit

#	ITEM	ANSWER
17	Top three priorities for the next visit	
18	Next visit date	

Issues to fix

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

VISITED BY (SIGNATURE)

STORE MANAGER (SIGNATURE)

DATE

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A starting point, not legal advice. Adapt it to your stores, your procedures and the rules where you operate.