RETAIL · SHIFT HANDOVER

Retail shift handover checklist

Review the store. Flag open work. Confirm who takes the next action.

> For each area, record the action reference, “no open issue”, “not checked” or “not applicable”. Urgent issues follow your immediate response procedure.

1 Shift details

HANDOVER REFERENCE
For example HO-022

STORE / DEPARTMENT
Name, number and area

DATE
Month / day / year

TIME ZONE
Use the same zone for all times

OUTGOING LEAD
Name and role

INCOMING LEAD
Name and role

OUTGOING SHIFT
Start and end times

INCOMING SHIFT
Start and end times

2 Check the store and record exceptions

CUSTOMER COMMITMENTS
Collections, callbacks and service issues; action reference or no open issue

STAFFING AND COVER
Area ownership, missing cover and agreed next steps

STOCK AND DELIVERIES
Unfinished receiving, replenishment or discrepancies; record reference

DISPLAYS AND PROMOTIONS
Changes incomplete or awaiting review; task reference

EQUIPMENT AND STORE CONDITION
Unavailable equipment, restrictions or repair updates; ticket reference

CASH, KEYS AND SECURITY
Confirm transfers under store procedure; keep sensitive details elsewhere

3 First priorities for the incoming lead

REVIEW FIRST
What needs attention first, and where to find the current record

RETAIL · SHIFT HANDOVER · CONTINUED

Open actions and acceptance

Keep current details in the original record. Use this page to confirm the next steps.

HANDOVER REFERENCE
Same value on both pages

1 Open action 1

CURRENT POSITION AND NEXT ACTION
Include location and task, order or ticket reference

NEXT ACTION OWNER
Name; distinguish store follow-up from specialist work

DUE / NEXT UPDATE
Date and time; state whether completion or update

2 Open action 2

CURRENT POSITION AND NEXT ACTION
Include location and task, order or ticket reference

NEXT ACTION OWNER
Name; distinguish store follow-up from specialist work

DUE / NEXT UPDATE
Date and time; state whether completion or update

3 Open action 3

CURRENT POSITION AND NEXT ACTION
Include location and task, order or ticket reference

NEXT ACTION OWNER
Name; distinguish store follow-up from specialist work

DUE / NEXT UPDATE
Date and time; state whether completion or update

4 Incoming lead confirmation

REVIEWED AND ACCEPTED BY
Incoming lead; confirms next steps, not task completion

DATE AND TIME
Use the time zone on page one

UNRESOLVED QUESTIONS / ESCALATION
Question, named contact and agreed follow-up time; or none

Use another action page with the same reference if needed. Acceptance does not close the tasks.

Free to use inside your company. To share publicly, link to getbitreport.com/blog/retail-shift-handover-checklist/