

RETAIL CHECKLIST TEMPLATE

Customer Experience Audit Checklist

Use this comprehensive checklist to review the complete customer journey, capture objective evidence, identify service gaps, and assign accountable corrective actions across every retail location.

LOCATION

DATE

REVIEWER

JOURNEY / SHIFT

1. Checklist setup and customer experience standards

1

Select the checklist type, location, department, customer journey stages, and service channels included in the review.

CHECKLIST SCOPE

SELECT

Choose option



Execution tip: Select only the locations, departments, channels, and customer journey stages included in this run so scores remain comparable and owners know the exact scope.

2

Confirm the reviewer is at the correct location and capture the checklist start geo-location and timestamp.

CRITICAL

GEO-LOCATION + TIMESTAMP

LOCATION

Geo-verified

STARTED

Timestamp



Execution tip: Activate geo-fencing and record the automatic start timestamp. Escalate attempts made outside the approved location or checklist window.

3

Verify the latest customer experience standards, service behaviours, target times, policies, and escalation rules are attached.

CRITICAL

REFERENCE UPLOAD

Attach standards

☐

Current version

☐

Local rules



Execution tip: Attach the current service standards, target times, policies, and escalation matrix so reviewers use one approved reference.

4

Define the customer segment, visit scenario, service need, and expected journey being evaluated.

SCENARIO FIELDS

CUSTOMER

Segment / scenario

CHANNEL

In-store / digital



Execution tip: Define the customer segment, need, channel, and scenario before observation. Different journeys may require different target behaviours and response times.

5

Review recent complaints, feedback themes, low-scoring touchpoints, and open customer experience actions before starting.

OPEN ACTION REVIEW

Area	Observed	Impact	Owner	Due



Execution tip: Show previous complaints and open actions inside the checklist. Repeated customer experience gaps should receive higher priority and earlier escalation.

6

Confirm the observation window, sample size, employee coverage, and required evidence for this checklist run.

WINDOW + SAMPLE SIZE

WINDOW

Start / end

SAMPLE

Customers / staff



Execution tip: Set the start and end window, sample size, and employee coverage. Require a reason when the minimum sample cannot be completed.

2. Exterior, entrance, and first impression

- 7 Assess the approach, parking, storefront, exterior signage, windows, and immediate surroundings from a customer perspective.

LIVE PHOTO + OBSERVATION

Add live photo

COMMENT | Add observation

 **Execution tip:** Capture the full customer approach and storefront context. Avoid identifiable customer images unless policy and local law permit them.

- 8 Verify entrance doors, ramps, access routes, security gates, and opening mechanisms are safe, clear, and accessible.

CRITICAL

SCORED INSPECTION

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Treat blocked, unsafe, or inaccessible entry as critical. Create an immediate action with owner, due time, containment, and escalation.

- 9 Check opening hours, contact information, customer notices, and service availability are current and easy to read.

TEXT VERIFICATION

OBSERVATION | Enter factual notes

 **Execution tip:** Compare notices with approved information. Require comments for outdated hours, policies, or customer contact details.

- 10 Confirm the entrance, mats, baskets, trolleys, counters, and first customer touchpoints are clean and organized.

PHOTO + COMMENT

Add live photo

COMMENT | Add observation

 **Execution tip:** Use live photos for visible cleanliness or organization gaps. Assign immediate correction before peak traffic where possible.

- 11 Record the first impression created by lighting, music, temperature, scent, noise, and visible staff activity.

ENVIRONMENT SCORE

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Score each environmental element separately so one strong factor does not hide poor lighting, temperature, noise, scent, or staff visibility.

- 12 Measure the time taken for a customer entering the location to be acknowledged or greeted.

CRITICAL

TIMER + TARGET

START | Timestamp

SECONDS | Enter time

Within target

Outside target

 **Execution tip:** Start the timer when the customer enters the service zone. Set a target by format and escalate repeated misses to staffing and operations owners.

3. Staff availability, greeting, and ownership

- 13 Confirm enough customer-facing employees are visible and positioned to support the expected traffic level.

STAFF COUNT

COUNT | | Enter number

TARGET | | Enter target

 **Execution tip:** Record visible employees and required coverage by zone. Compare the count with roster and traffic expectations.

- 14 Assess whether the greeting is timely, natural, polite, confident, and appropriate to the brand.

CRITICAL

SCORED SINGLE ANSWER

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Define the approved greeting behaviour and target time. Require a comment for partial or failed responses and coach the exact behaviour observed.

- 15 Observe employee eye contact, body language, tone, attentiveness, and willingness to engage.

BEHAVIOUR SCORE

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Use observable cues such as eye contact, open posture, attention, and tone. Avoid vague personality judgments.

- 16 Check whether employees offer assistance without forcing an interaction or leaving customers unsupported.

SCORED SINGLE ANSWER

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Check whether help is offered at the right moment. Record both customers left unsupported and overly intrusive selling.

- 17 Verify waiting customers are acknowledged, informed, and managed appropriately when employees are busy.

CRITICAL

TIMER + COMMENT

START | | Timestamp

SECONDS | | Enter time

Within target

Outside target

 **Execution tip:** Time acknowledgement and update intervals when customers wait. Escalate unmanaged queues or customers waiting without information.

- 18 Confirm customer requests are owned through completion or handed over clearly to the correct employee.

OBSERVATION + OWNER

OBSERVATION | | Enter factual notes

 **Execution tip:** Record who owned the request, who received the handoff, and whether the customer had to repeat information.

4. Needs discovery and customer assistance

19 Check whether employees ask relevant questions before recommending a product, service, or solution.

BEHAVIOUR SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Define the minimum discovery questions expected for each customer journey. Score the behaviour, not whether the customer purchased.

20 Assess whether employees listen, confirm understanding, and respond to the customer's stated need.

SCORED SINGLE ANSWER

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Require factual notes showing how the employee confirmed understanding and adjusted the response.

21 Verify employees guide customers to the required area or product instead of only pointing from a distance.

OBSERVATION + COMMENT

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Observe whether the employee escorts, demonstrates, or actively helps. Use comments when self-service is the approved model.

22 Check whether employees can help locate the correct product, size, variant, service, or information promptly.

PRODUCT SEARCH TEST

Pass

Fail

RESULT | Record details

 Execution tip: Test a realistic product, size, variant, or service request. Record time, result, and any system or stock blocker.

23 Confirm suitable alternatives, substitutions, delivery options, or next steps are offered when an item or service is unavailable.

ALTERNATIVE OFFERED

OBSERVATION | Enter factual notes

 Execution tip: Capture the alternative, substitution, order option, or next step offered and whether it genuinely matched the need.

24 Observe whether employees follow up after the customer browses, tries a product, or receives initial assistance.

FOLLOW-UP SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Set the point when follow-up should occur after browsing or trial. Avoid repeated interruption and measure whether assistance remains available.

5. Product knowledge and recommendations

25 Verify employees explain key product or service features, benefits, limitations, and suitability accurately.

CRITICAL

KNOWLEDGE TEST

Pass

Fail

RESULT

Record details



Execution tip: Use scenario-based knowledge tests with approved answer guidance. Incorrect safety, suitability, policy, or financial information should be critical.

26 Check whether stock availability, order options, delivery times, installation, and service terms are communicated correctly.

INFORMATION CHECK

OBSERVATION

Enter factual notes



Execution tip: Record the exact availability, delivery, installation, and service information provided, then compare it with the approved source.

27 Assess whether the recommendation matches the customer's need, budget, preferences, and intended use.

RECOMMENDATION SCORE

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Score fit against need, budget, preference, and intended use. Require comments when recommendations appear generic or unsuitable.

28 Confirm comparisons between products or services are clear, factual, and easy for the customer to understand.

COMPARISON NOTES

OBSERVATION

Enter factual notes



Execution tip: Ask for a comparison and record whether differences are explained factually, clearly, and without unsupported claims.

29 Verify promotions, loyalty benefits, warranties, returns, exchanges, and after-sales support are explained accurately.

CRITICAL

POLICY KNOWLEDGE TEST

Pass

Fail

RESULT

Record details



Execution tip: Test the policies most likely to affect purchase confidence. Escalate incorrect promises that may create complaints or financial loss.

30 Check whether complementary products or services are suggested naturally without creating inappropriate sales pressure.

SALES BEHAVIOUR SCORE

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Observe whether additional suggestions are relevant and optional. Record pressure, misleading urgency, or unsuitable upselling.

6. Store environment, accessibility, and convenience

31 Assess cleanliness and presentation across floors, counters, shelves, seating, fitting rooms, and customer-use areas.

LIVE PHOTO + COMMENT

Add live photo

COMMENT | Add observation

 Execution tip: Capture live evidence of material housekeeping or presentation gaps and route them to the correct store or facilities owner.

32 Verify department signs, wayfinding, product information, and service instructions help customers navigate independently.

WAYFINDING TEST

Pass

Fail

RESULT | Record details

 Execution tip: Test navigation using a realistic destination. Record unclear, missing, conflicting, or inaccessible signs.

33 Confirm aisles, entrances, service counters, ramps, and accessibility routes remain clear and usable.

CRITICAL

ACCESSIBILITY SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Treat blocked accessible routes and unusable service points as critical. Require immediate containment and manager escalation.

34 Check fitting rooms, consultation areas, collection points, waiting zones, and washrooms are available and customer-ready where applicable.

AREA EVIDENCE

Add live photo

COMMENT | Add observation

 Execution tip: Photograph the area without customers where possible. Check privacy, cleanliness, availability, and readiness together.

35 Verify baskets, trolleys, testers, kiosks, digital screens, call buttons, and other customer-use equipment work correctly.

EQUIPMENT FUNCTION TEST

Pass

Fail

RESULT | Record details

 Execution tip: Test customer-use equipment rather than only looking at it. Record device ID, error, time, owner, and workaround.

36 Record any maintenance, housekeeping, safety, comfort, or accessibility issue that negatively affects the customer journey.

CRITICAL

ISSUE LOG

Area	Observed	Impact	Owner	Due

 Execution tip: Log the exact location, impact, owner, due time, and required closure proof for every facility or convenience issue.

7. Queue, checkout, payment, and farewell

37 Record queue length and the time taken before checkout or final service begins.

CRITICAL

QUEUE TIMER

START | Timestamp

SECONDS | Enter time

Within target

Outside target

 Execution tip: Measure queue length and wait time at the same point for every check. Trigger alerts when the agreed threshold is exceeded.

38 Confirm enough tills, counters, or service points are open for the observed customer demand.

TILL / COUNTER COUNT

COUNT | Enter number

TARGET | Enter target

 Execution tip: Record open service points, available employees, and observed demand. Use the data to separate staffing gaps from process delays.

39 Assess whether the cashier or service employee acknowledges the customer and maintains professional communication.

SERVICE BEHAVIOUR SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Score acknowledgement, clarity, care, and attention at checkout. Do not rely only on transaction speed.

40 Verify products, prices, promotions, discounts, taxes, loyalty benefits, and totals are processed correctly.

CRITICAL

TRANSACTION TEST

Pass

Fail

RESULT | Record details

 Execution tip: Run an approved test transaction and compare scanned prices, promotions, discounts, tax, loyalty, and totals with the expected result.

41 Check payment options, terminal functionality, cash handling, and payment confirmation are clear and reliable.

CRITICAL

PAYMENT TEST

Pass

Fail

RESULT | Record details

 Execution tip: Test required payment methods and record terminal, network, cash, or confirmation failures. Escalate any issue preventing customer payment.

42 Confirm the receipt, packaging, farewell, invitation to return, and final impression meet the approved service standard.

FAREWELL SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Verify receipt accuracy, packaging, closing words, and final assistance. The last interaction should have its own score.

8. Returns, complaints, and service recovery

43

Verify the returns, exchange, refund, complaint, and warranty policy is current and accessible to customers and employees.

CRITICAL

POLICY REFERENCE

Attach standards

Current version

Local rules

Execution tip:

Attach the current returns, refund, warranty, and complaint policy. Do not allow outdated local interpretations to become the standard.

44

Assess whether employees listen without interruption, show empathy, and acknowledge the customer's concern.

CRITICAL

EMPATHY SCORE

Compliant

Partially compliant

Non-compliant

Create action

Execution tip:

Score observable listening and empathy behaviours. Require factual notes instead of judging attitude broadly.

45

Confirm the employee takes ownership and avoids unnecessary transfers, repetition, or blame.

CRITICAL

OWNERSHIP SCORE

Compliant

Partially compliant

Non-compliant

Create action

Execution tip:

Record every transfer and repeat explanation. Excessive handoffs should create a process action, not only employee coaching.

46

Check whether available resolution options are explained clearly and within the employee's approved authority.

RESOLUTION NOTES

OBSERVATION

Enter factual notes

Execution tip:

Capture the options offered, authority level, customer expectation, and final agreed next step.

47

Measure escalation time and waiting time when manager or specialist support is required.

CRITICAL

ESCALATION TIMER

START

Timestamp

SECONDS

Enter time

Within target

Outside target

Execution tip:

Start the timer when escalation is requested and stop it when the responsible person engages. Set automatic alerts for excessive delay.

48

Verify promised follow-up, customer details, case reference, owner, and resolution deadline are captured accurately.

CRITICAL

FOLLOW-UP RECORD

Area	Observed	Impact	Owner	Due

Execution tip:

Record customer reference, owner, deadline, contact channel, and proof of completion. Escalate overdue promises automatically.

9. Omnichannel and post-purchase experience

49

Verify website, app, call centre, social, and in-store information are consistent for hours, prices, stock, promotions, and policies.

CHANNEL CONSISTENCY TEST

Pass

Fail

RESULT | Record details

 **Execution tip:** Compare current information across the selected channels. Create one action owner for conflicting prices, hours, stock, promotions, or policies.

50

Check click-and-collect, order pickup, reservation, appointment, or collection workflows are prepared and easy for customers.

CRITICAL

WORKFLOW TEST

Pass

Fail

RESULT | Record details

 **Execution tip:** Complete the full collection or appointment workflow with an approved test order. Record readiness, wait time, identity checks, and handoff quality.

51

Confirm order status, delays, substitutions, cancellations, and pickup instructions are communicated accurately and on time.

COMMUNICATION RECORD

OBSERVATION | Enter factual notes

 **Execution tip:** Capture the message, timestamp, channel, and actual order status. Escalate incorrect or late communication that affects the customer.

52

Assess delivery, installation, repair, warranty, and after-sales handoffs for clear ownership and customer communication.

CRITICAL

HANDOFF RECORD

Area	Observed	Impact	Owner	Due

 **Execution tip:** Record each handoff owner and promised timeline. Do not allow after-sales responsibility to disappear between teams.

53

Verify loyalty enrolment, customer profiles, preferences, consent, and personal information are handled correctly and respectfully.

CRITICAL

PRIVACY AND CONSENT CHECK

Pass

Fail

RESULT | Record details

 **Execution tip:** Test consent, access, correction, and privacy steps using approved scenarios. Never capture unnecessary personal customer data in checklist evidence.

54

Check whether customers receive an appropriate feedback option, follow-up message, support contact, or next-step confirmation.

FOLLOW-UP CONFIRMATION

OBSERVATION | Enter factual notes

 **Execution tip:** Record whether the customer received the correct feedback option, support contact, reference, or next-step confirmation.

10. Overall experience, actions, and sign-off

- 55** Score the customer experience by journey stage and calculate the overall result without hiding critical failures. CRITICAL WEIGHTED SECTION SCORE

FIRST IMPRESSION | 1 to 5

SERVICE | 1 to 5

CHECKOUT | 1 to 5

 **Execution tip:** Keep journey-stage scores visible and apply score caps for unresolved critical failures so strong areas cannot hide serious customer harm.

- 56** Record the strongest customer experience moments and the behaviours that should be repeated across locations. POSITIVE PRACTICE SUMMARY

OBSERVATION | Enter factual notes

 **Execution tip:** Record specific behaviours and conditions worth repeating. Positive evidence helps training teams scale what works.

- 57** Log the highest-impact customer experience gaps with evidence, severity, owner, due time, and required closure proof. CRITICAL PRIORITY ACTION SUMMARY

Area	Observed	Impact	Owner	Due

 **Execution tip:** Summarize only material gaps. Include journey stage, evidence, customer impact, owner, due time, and required closure proof.

- 58** Confirm every critical customer experience failure is corrected, contained, or formally escalated before submission. CRITICAL CRITICAL CLOSURE CHECK

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Do not allow silent closure. Require containment, owner, manager acknowledgement, evidence, and escalation for open critical failures.

- 59** Obtain store manager acknowledgement of findings, action owners, due dates, open risks, and immediate containment. CRITICAL MANAGER SIGNATURE + TIMESTAMP

NAME | Enter

SIGNATURE | Sign

SUBMITTED | Timestamp

 **Execution tip:** The manager should review factual findings, evidence, owners, due dates, and open risks before signing.

- 60** Complete reviewer approval with final score, critical status, open actions, and submission timestamp. CRITICAL REVIEWER SIGNATURE + TIMESTAMP

NAME | Enter

SIGNATURE | Sign

SUBMITTED | Timestamp

 **Execution tip:** Require independent review of scoring, critical status, action quality, and evidence before final approval.

RUN THIS CHECKLIST IN TAQTICS

Turn every customer experience gap into accountable action

Schedule checks by store and journey stage, enforce geo-fencing and time windows, capture target times and live evidence, assign actions, escalate critical failures, and compare customer experience across locations.

Geo-verification

Target times

Live evidence

Corrective actions

Experience dashboards

Try the Customer Experience Audit Checklist in Taqtics