

RETAIL CHECKLIST TEMPLATE

Customer Service Audit Checklist

Use this comprehensive checklist to review frontline service, response times, accuracy, ownership, complaints, follow-up, and corrective actions across every retail location.

LOCATION

DATE

REVIEWER

JOURNEY / SHIFT
Service touchpoint / shift

1. Audit setup and customer service standards

1

Select the audit type, location, department, service touchpoints, and channels included in the review.

AUDIT SCOPE

SELECT

 | Choose option

Execution tip:

 Select only the locations, departments, touchpoints, and channels included in this run so results remain comparable.

2

Confirm the auditor is at the correct location and capture the audit start geo-location and timestamp.

CRITICAL

GEO-LOCATION + TIMESTAMP

LOCATION

 | Geo-verified

STARTED

 | Timestamp

Execution tip:

 Use geo-fencing and the automatic start timestamp. Escalate submissions started outside the approved location or window.

3

Verify the latest customer service standards, response-time targets, policies, scripts, and escalation rules are available.

CRITICAL

REFERENCE UPLOAD

Attach standards

Current version

Local rules

Execution tip:

 Attach the current service standards, response-time targets, policies, scripts, and escalation matrix before the audit starts.

4

Define the customer scenario, service request, expected outcome, and employee roles being evaluated.

SCENARIO FIELDS

CUSTOMER

 | Segment / scenario

CHANNEL

 | In-store / digital

Execution tip:

 Define the customer request, expected outcome, channel, and employee roles before observation.

5

Review recent complaints, repeat service failures, low-scoring touchpoints, and open customer service actions before starting.

OPEN ACTION REVIEW

Area	Observed	Impact	Owner	Due

Execution tip:

 Show recent complaints and open service actions inside the checklist so repeat failures receive higher priority.

6

Confirm the observation window, customer sample, employee coverage, and required evidence for this audit.

WINDOW + SAMPLE SIZE

WINDOW

 | Start / end

SAMPLE

 | Customers / staff

Execution tip:

 Set the audit window, customer sample, employee coverage, and minimum evidence requirement.

Taqtics | Digitize checklists, evidence, corrective actions, escalation, and approvals.

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2. First contact, greeting, and staff readiness

7 Confirm enough customer-facing employees are present, visible, and positioned for the expected demand.

STAFF COUNT

Add live photo

COMMENT | Add observation

 Execution tip: Compare visible service capacity with expected traffic and record understaffing by touchpoint.

8 Check employees are ready for service with correct uniform, name identification, equipment, and system access.

CRITICAL

READINESS INSPECTION

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Check uniform, name identification, tools, devices, and system access before peak service begins.

9 Measure the time taken for a customer to be acknowledged after entering or joining a service queue.

CRITICAL

TIMER + TARGET

OBSERVATION | Enter factual notes

 Execution tip: Start timing when the customer enters or joins the queue and stop at the first meaningful acknowledgement.

10 Assess whether the greeting is polite, confident, natural, and appropriate to the brand.

GREETING SCORE

Add live photo

COMMENT | Add observation

 Execution tip: Score the greeting against specific behaviours such as timing, tone, confidence, and brand language.

11 Observe eye contact, tone, body language, attentiveness, and willingness to help.

BEHAVIOUR SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Record observable eye contact, body language, attentiveness, and willingness to help.

12 Verify waiting customers are acknowledged and informed when immediate assistance is not possible.

CRITICAL

TIMER + COMMENT

START | Timestamp

SECONDS | Enter time

Within target

Outside target

 Execution tip: Require a comment when waiting customers are not acknowledged within the target time.

3. Customer needs discovery and assistance

- 13 Check whether the employee asks relevant questions before offering a product, service, or resolution.

BEHAVIOUR SCORE

COUNT | | Enter number

TARGET | | Enter target

 **Execution tip:** Observe whether questions are relevant to the customer request and asked before a recommendation is made.

- 14 Assess whether the employee listens without interruption and confirms understanding of the customer request.

LISTENING SCORE

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Capture whether the employee allows the customer to finish and confirms understanding.

- 15 Verify the employee guides the customer to the correct product, counter, department, or service point.

OBSERVATION + COMMENT

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Check that the employee physically guides or clearly directs the customer to the correct service point.

- 16 Check whether the employee identifies important needs such as budget, urgency, preference, size, or intended use.

NEEDS CAPTURE

Compliant

Partially compliant

Non-compliant

Create action

 **Execution tip:** Record the needs identified and compare them with the final recommendation or resolution.

- 17 Confirm suitable alternatives, substitutions, ordering options, or next steps are offered when the first choice is unavailable.

ALTERNATIVE OFFERED

START | | Timestamp

SECONDS | | Enter time

Within target

Outside target

 **Execution tip:** Require an alternative, ordering option, or next step when the first choice is unavailable.

- 18 Observe whether the employee follows up after initial assistance instead of leaving the interaction incomplete.

FOLLOW-UP SCORE

OBSERVATION | | Enter factual notes

 **Execution tip:** Observe whether the employee checks back after initial assistance and completes the interaction.

4. Product, service, and policy knowledge

19 Verify the employee explains key features, benefits, limitations, and suitability accurately.

CRITICAL

KNOWLEDGE TEST

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Use a standard scenario and compare the answer with approved product or service information.

20 Check stock availability, service availability, lead times, delivery, installation, or appointment information is correct.

INFORMATION CHECK

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Verify availability, lead times, delivery, installation, and appointment information against the system.

21 Assess whether recommendations match the customer request rather than employee convenience or sales pressure.

RECOMMENDATION SCORE

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Compare the recommendation with the stated need, budget, urgency, and intended use.

22 Confirm product or service comparisons are factual, clear, and easy to understand.

COMPARISON NOTES

Pass

Fail

RESULT

Record details



Execution tip: Record the options compared and whether differences were explained factually and clearly.

23 Verify promotions, loyalty benefits, warranties, returns, exchanges, refunds, and after-sales support are explained correctly.

CRITICAL

POLICY KNOWLEDGE TEST

OBSERVATION

Enter factual notes



Execution tip: Test promotions, loyalty, warranty, return, refund, and after-sales knowledge using an approved scenario.

24 Check whether the employee confidently seeks help or verifies information when unsure instead of guessing.

ESCALATION BEHAVIOUR

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Employees should verify uncertain information or seek help rather than provide an unsupported answer.

5. Service speed, queue, and handoff

25 Record queue length and total waiting time before service begins.

CRITICAL

QUEUE TIMER

Pass

Fail

RESULT

Record details



Execution tip: Record queue length and wait time at a consistent point in the customer journey.

26 Confirm enough service points, counters, tills, or specialists are open for the observed demand.

SERVICE POINT COUNT

OBSERVATION

Enter factual notes



Execution tip: Compare open counters or specialists with the observed demand and record the reason for closures.

27 Measure the time taken to complete the service request or transaction.

SERVICE DURATION TIMER

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Measure from service start to completion and separate customer delay from internal processing delay.

28 Check customers receive clear updates when service is delayed or requires additional processing.

DELAY COMMUNICATION CHECK

OBSERVATION

Enter factual notes



Execution tip: Record whether the customer receives a clear reason, expected time, and next update when delayed.

29 Verify handoffs between employees or departments include the customer need, progress, and next owner.

CRITICAL

HANDOFF RECORD

Pass

Fail

RESULT

Record details



Execution tip: Require the first employee to brief the next owner and confirm the customer understands the handoff.

30 Confirm customers are not asked to repeat information unnecessarily during transfers or escalations.

CRITICAL

REPEAT INFORMATION CHECK

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Count unnecessary repetitions and identify where customer context is lost between teams or systems.

6. Professionalism, empathy, and conduct

31

Assess whether employees remain respectful, calm, and professional throughout the interaction.

PROFESSIONALISM SCORE

Add live photo

COMMENT | Add observation

 Execution tip: Score only observable conduct such as tone, language, patience, and control under pressure.

32

Check employees use clear language and avoid jargon, blame, arguments, or dismissive responses.

COMMUNICATION CHECK

Pass

Fail

RESULT | Record details

 Execution tip: Record examples of clear language or behaviour that creates confusion, blame, or conflict.

33

Verify employee conversations, mobile phone use, and personal activity do not interfere with customer service.

CONDUCT OBSERVATION

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Capture distractions that interrupt service, including personal conversations or mobile phone use.

34

Observe whether employees protect customer privacy when discussing personal, payment, or complaint information.

CRITICAL

PRIVACY CHECK

Add live photo

COMMENT | Add observation

 Execution tip: Verify personal, complaint, and payment information cannot be overheard or viewed by unauthorized people.

35

Confirm customers requiring additional assistance are supported patiently and respectfully.

ACCESSIBILITY SUPPORT SCORE

Pass

Fail

RESULT | Record details

 Execution tip: Assess patience, clarity, and practical assistance for customers requiring additional support.

36

Record any discriminatory, unsafe, inappropriate, or brand-damaging behaviour for immediate escalation.

CRITICAL

CRITICAL INCIDENT LOG

Area	Observed	Impact	Owner	Due

 Execution tip: Escalate discriminatory, unsafe, abusive, or brand-damaging behaviour immediately with factual evidence.

7. Checkout, payment, and transaction support

37 Confirm the cashier or service employee acknowledges the customer at the transaction point.

SERVICE BEHAVIOUR SCORE

START | | Timestamp

SECONDS | | Enter time

Within target

Outside target

 Execution tip: Observe acknowledgement, explanation, and professionalism at the transaction point.

38 Verify items, services, quantities, prices, promotions, discounts, taxes, loyalty benefits, and totals are processed correctly.

CRITICAL

TRANSACTION TEST

COUNT | | Enter number

TARGET | | Enter target

 Execution tip: Use a sample transaction to verify products, services, prices, promotions, discounts, tax, and loyalty.

39 Check payment options, terminal operation, cash handling, and payment confirmation are explained clearly.

CRITICAL

PAYMENT TEST

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Test available payment methods and confirm the employee explains errors or alternatives clearly.

40 Assess whether the employee resolves barcode, price, payment, or system errors without unnecessary delay.

ISSUE RESOLUTION TIMER

Pass

Fail

RESULT | | Record details

 Execution tip: Measure the time and ownership required to resolve barcode, price, payment, or system errors.

41 Confirm the receipt, invoice, warranty document, collection note, or service record is accurate and provided.

CRITICAL

DOCUMENT CHECK

Pass

Fail

RESULT | | Record details

 Execution tip: Verify the customer receives the correct receipt, invoice, warranty, collection, or service record.

42 Verify the employee closes the interaction with a clear summary, farewell, and any required next step.

CLOSURE SCORE

Compliant

Partially compliant

Non-compliant

Create action

 Execution tip: Confirm the employee summarizes the outcome, explains next steps, and closes professionally.

8. Complaints, returns, and service recovery

43 Verify the complaint, return, exchange, refund, and warranty policy is current and accessible to employees.

CRITICAL

POLICY REFERENCE

Attach standards



Current version



Local rules



Execution tip: Attach or link the current complaint, return, exchange, refund, and warranty policy.

44 Assess whether the employee listens fully, acknowledges the concern, and responds with empathy.

CRITICAL

EMPATHY SCORE

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Observe whether the employee listens fully, acknowledges the concern, and responds without defensiveness.

45 Confirm the employee takes ownership and avoids unnecessary transfers, blame, or defensive language.

CRITICAL

OWNERSHIP SCORE

Compliant

Partially compliant

Non-compliant

Create action



Execution tip: Record transfers and identify whether the employee remains accountable until a clear owner accepts the case.

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

RESOLUTION NOTES

OBSERVATION | Enter factual notes



Execution tip: Document the options offered, customer choice, approval level, and any unresolved expectation.

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

CRITICAL

ESCALATION TIMER

START | Timestamp

SECONDS | Enter time

Within target

Outside target



Execution tip: Measure from escalation request to manager or specialist engagement and final decision.

48 Verify the case reference, customer contact, promised follow-up, owner, and deadline are recorded accurately.

CRITICAL

FOLLOW-UP RECORD

Area	Observed	Impact	Owner	Due



Execution tip: Require case reference, customer contact, owner, due time, and proof that the promised follow-up occurred.

9. Omnichannel and follow-up service

49

Verify customer service information is consistent across store, website, app, call centre, email, and social channels.

CHANNEL CONSISTENCY TEST

Pass

Fail

RESULT | Record details

🔍

Execution tip: Compare service information across store, website, app, call centre, email, and social channels.

50

Check click-and-collect, pickup, reservation, appointment, delivery, or service requests are prepared before the customer arrives.

CRITICAL

WORKFLOW TEST

Pass

Fail

RESULT | Record details

🔍

Execution tip: Test a pickup, reservation, appointment, delivery, or service request from confirmation to customer arrival.

51

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

COMMUNICATION RECORD

OBSERVATION | Enter factual notes

🔍

Execution tip: Verify status updates are accurate, timely, and consistent with system records.

52

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

CRITICAL

HANDOFF RECORD

Area	Observed	Impact	Owner	Due

🔍

Execution tip: Record the responsible owner, expected time, customer communication, and acceptance by the next team.

53

Verify customer details, preferences, consent, and communication records are handled accurately and securely.

CRITICAL

PRIVACY AND CONSENT CHECK

Pass

Fail

RESULT | Record details

🔍

Execution tip: Verify customer details, preferences, consent, and service records are handled securely and accurately.

54

Check promised callbacks, updates, refunds, replacements, or follow-up actions are completed within the agreed time.

FOLLOW-UP CONFIRMATION

OBSERVATION | Enter factual notes

🔍

Execution tip: Check callback, refund, replacement, update, or follow-up completion against the promised time.

10. Findings, coaching, actions, and sign-off

55 Score customer service by touchpoint 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 touchpoint scores visible and apply score caps for unresolved critical service failures.

56 Record strong service behaviours that should be recognized, coached, and repeated across locations.

POSITIVE PRACTICE SUMMARY

OBSERVATION | Enter factual notes

 **Execution tip:** Record specific service behaviours and conditions worth recognizing and repeating across locations.

57 Log high-impact service gaps with evidence, customer impact, severity, owner, due time, and required closure proof.

CRITICAL

PRIORITY ACTION SUMMARY

Area	Observed	Impact	Owner	Due

 **Execution tip:** Include service touchpoint, evidence, customer impact, owner, due time, and closure proof for every material gap.

58 Confirm every critical service failure is contained, corrected, 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.

59 Obtain store manager acknowledgement of findings, coaching needs, action owners, due dates, and open risks.

CRITICAL

MANAGER SIGNATURE + TIMESTAMP

NAME | Enter

SIGNATURE | Sign

SUBMITTED | Timestamp

 **Execution tip:** The manager should review factual findings, coaching needs, 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 approval.

RUN THIS CHECKLIST IN TAQTICS

Turn every customer service gap into accountable improvement

Schedule service audits by store and touchpoint, enforce geo-fencing and time windows, capture response times and live evidence, assign coaching and corrective actions, escalate critical failures, and compare service performance across locations.

Geo-verification

Response times

Live evidence

Coaching actions

Service dashboards

Try the Customer Service Audit Checklist in Taqtics