RETAIL CHECKLIST TEMPLATE

Daily Store Operations Checklist

Use this comprehensive checklist to control shift setup, opening readiness, people, customer service, merchandising, stock, cash, safety, tasks, issues, handover, and management sign-off across every retail location.

LOCATION	DATE	REVIEWER	JOURNEY / SHIFT
			Shift / operating period

1. Daily setup, priorities, and shift handover

1 Confirm the store, date, shift, operating hours, duty manager, and checklist owner.
CRITICAL | SHIFT SETUP FIELDS

SELECT | Choose option
OWNER | Enter

Execution tip: Record store, date, shift, planned operating hours, duty manager, and checklist owner before tasks begin.

2 Review the previous shift handover, unresolved critical issues, overdue tasks, and open customer commitments.
CRITICAL | HANDOVER ACTION REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Open all unresolved critical issues and customer commitments before accepting responsibility for the shift.

3 Confirm the day's sales targets, traffic forecast, deliveries, promotions, events, and known operational risks.
DAILY CONTEXT NOTES

OBSERVATION | Enter factual notes

Execution tip: Record traffic, deliveries, promotions, events, and risks so the shift plan reflects actual operating conditions.

4 Assign opening, peak-hour, replenishment, service, cash, safety, and closing responsibilities to named employees.
CRITICAL | RESPONSIBILITY MATRIX

Area	Observed	Impact	Owner	Due

Execution tip: Assign every major daily control to a named employee and confirm backup ownership.

5 Verify current SOPs, emergency contacts, escalation routes, and support-team details are accessible.
SOP AND CONTACT CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Keep current procedures and escalation contacts accessible at the point of work.

6 Record any staffing, system, facility, weather, delivery, or security condition that may affect normal operations.
OPERATING CONSTRAINT NOTES

OBSERVATION | Enter factual notes

Execution tip: Record unusual conditions factually and create actions where they affect safety, service, or compliance.

2. Opening readiness and customer areas

7 Confirm the storefront, entrance, doors, shutters, windows, exterior signs, and opening-hour notices are ready.
EXTERIOR READINESS SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Inspect the full customer approach before opening and record any presentation or access gap.

8 Check customer routes, accessibility points, parking approaches, ramps, mats, and entrances are clear and safe.
CRITICAL | SAFETY AND ACCESSIBILITY CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Remove or isolate obstructions immediately and retain evidence of the condition and control.

9 Verify the sales floor, counters, fitting rooms, consultation areas, and customer facilities are clean and presentable.
CRITICAL | CUSTOMER AREA READINESS SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Walk all customer-facing zones and confirm cleaning, setup, and service readiness before trading.

10 Confirm lighting, HVAC, music, scent, digital screens, and other customer-experience systems are operating correctly.
SYSTEMS AND ENVIRONMENT TEST

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Test key customer-experience systems instead of relying only on visual confirmation.

11 Check baskets, trolleys, testers, kiosks, queue barriers, seating, and customer-use equipment are available and usable.
CUSTOMER EQUIPMENT COUNT

EXPECTED | Enter
OBSERVED | Enter
VARIANCE | Auto

Execution tip: Record missing, damaged, unclean, or unusable customer equipment and assign replacement or repair.

12 Capture approved opening evidence for the entrance and priority customer-facing zones.
LIVE OPENING PHOTOS

EVIDENCE | Add live photo
COMMENT | Add observation

Execution tip: Capture wide, policy-approved images after setup is complete and before customers enter.

3. Team deployment, attendance, and briefing

13 Compare scheduled employees with those present, late, absent, reassigned, or working remotely.

CRITICAL | ROSTER COMPARISON

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Compare planned, present, late, absent, and redeployed employees by role and shift requirement.

14 Confirm required roles, key holders, cash handlers, supervisors, specialists, and first-aiders are available.

CRITICAL | CRITICAL ROLE CONFIRMATION

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Do not begin high-risk activities without authorized key holders, cash handlers, supervisors, or first-aiders.

15 Check uniforms, grooming, name badges, PPE, and role-specific appearance standards.

GROOMING AND PPE SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Apply the same visible standard by role and record every material exception.

16 Conduct the shift briefing covering targets, campaigns, service standards, safety risks, tasks, and assignments.

BRIEFING CONFIRMATION

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Ask employees about priorities and risks instead of relying only on a completed briefing record.

17 Confirm employees understand active promotions, priority products, returns, complaints, and escalation procedures.

KNOWLEDGE CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Use short scenario questions to confirm understanding of promotions, service, and escalation procedures.

18 Assign customer zones, service points, break coverage, replenishment areas, and backup responsibilities.

CRITICAL | DEPLOYMENT PLAN

SELECT | Choose option

OWNER | Enter

Execution tip: Record the assigned zone, task, break coverage, and backup owner for each critical position.

4. Customer service and sales execution

19 Observe whether customers are acknowledged, greeted, and offered assistance within the target time.

GREETING TIMER + SCORE

COUNT | Enter — TIME | Minutes — COMMENT | Add note

Execution tip: Observe normal customer flow and record acknowledgement time, demand, staffing, and context.

20 Check employees use effective needs discovery, product knowledge, recommendations, and service ownership.

SERVICE BEHAVIOUR SCORE

Compliant — Partially compliant — Non-compliant — Create action

Execution tip: Assess observable discovery, knowledge, recommendation, accuracy, and ownership.

21 Confirm customers receive accurate information about availability, price, promotions, delivery, warranty, and returns.

CRITICAL — INFORMATION ACCURACY TEST

Compliant — Partially compliant — Non-compliant — Create action

Execution tip: Compare the employee response with current system and policy information.

22 Monitor queue length, service time, open counters, and communication during delays.

CRITICAL — QUEUE COUNT + TIMER

COUNT | Enter — TIME | Minutes — COMMENT | Add note

Execution tip: Record queue length, open counters, wait time, and communication during delays.

23 Verify complaints, returns, exchanges, and service-recovery cases are handled with empathy and policy compliance.

CRITICAL — SERVICE RECOVERY REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Review a real or approved scenario for empathy, policy, ownership, resolution, and follow-up.

24 Review customer feedback, unresolved commitments, callbacks, and follow-up actions due during the shift.

CRITICAL — CUSTOMER COMMITMENT REGISTER

Area	Observed	Impact	Owner	Due

Execution tip: Record every callback, update, refund, replacement, or follow-up with owner and due time.

5. Merchandising, pricing, and promotions

25 Verify windows, entrance displays, focal points, planograms, and priority zones match current guidance.
PLANOGRAM AND DISPLAY SCORE

SELECT | Choose option
OWNER | Enter

Execution tip: Use the current approved guide and capture evidence only for material execution differences.

26 Check products are correctly placed, faced, clean, organized, and easy for customers to browse.
PRODUCT PRESENTATION CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Sample several priority categories for placement, facing, cleanliness, organization, and browseability.

27 Confirm shelf labels, product tickets, promotional messages, and offer conditions are current and readable.
CRITICAL | LABEL AND OFFER CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Match product, label, price, promotion wording, and validity dates.

28 Test sampled shelf or display prices against POS prices and the approved price file.
CRITICAL | SHELF-TO-POS PRICE TEST

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Use a defined sample and record displayed price, transaction price, and customer impact.

29 Verify active discounts, bundles, coupons, loyalty offers, and campaign mechanics execute correctly.
CRITICAL | PROMOTION TRANSACTION TEST

Finding	Priority	Owner	Due	Evidence

Execution tip: Test current offers, exclusions, coupons, and loyalty mechanics at checkout.

30 Record missing signage, incorrect placement, empty displays, price errors, and owners for correction.
MERCHANDISING ACTION GRID

Area	Observed	Impact	Owner	Due

Execution tip: Record zone, issue, customer impact, owner, deadline, and required evidence.

6. Inventory, replenishment, and stockroom

31 Confirm priority, fast-moving, promotional, and essential SKUs are available on the sales floor.
CRITICAL | PRIORITY AVAILABILITY CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Check agreed hero and essential SKUs on the floor and verify backroom stock before marking unavailable.

32 Review out-of-stocks and confirm backroom quantity, replenishment owner, and expected completion time.
OUT-OF-STOCK ACTION RECORD

Area	Observed	Impact	Owner	Due

Execution tip: Capture item, shelf gap, backroom quantity, owner, and expected replenishment time.

33 Check replenishment is completed safely without blocked aisles, unattended stock, or customer disruption.
CRITICAL | REPLENISHMENT SAFETY SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Prevent blocked aisles, unattended cartons, unstable stock, and customer disruption.

34 Verify stockroom access, bin labels, stacking, segregation, housekeeping, and emergency routes are controlled.
CRITICAL | STOCKROOM CONTROL SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Inspect access, labels, segregation, stacking, housekeeping, and emergency routes.

35 Review receiving, transfers, returns, damages, expiry, quarantine, and non-sellable stock for correct status.
CRITICAL | INVENTORY STATUS REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Keep sellable, damaged, expired, returned, quarantined, and non-sellable stock clearly separated.

36 Compare sampled physical quantities with system balances and investigate material variances.
CRITICAL | SYSTEM-TO-PHYSICAL SAMPLE

Area	Observed	Impact	Owner	Due

Execution tip: Define the sample before counting and investigate material variance rather than adjusting silently.

7. POS, cash, and transaction controls

37 Confirm each active POS terminal, scanner, printer, payment device, and required integration is operating.

CRITICAL | POS EQUIPMENT TEST

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Test every required device and create a support ticket for any fault affecting trade.

38 Verify tills are assigned to authorized employees and secured whenever unattended.

CRITICAL | TILL ASSIGNMENT CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Confirm one accountable operator per active till and secure access when unattended.

39 Check opening floats, cash counts, safe custody, till records, and supervisor approvals are complete.

CRITICAL | OPENING CASH CONTROL

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Verify count, float, safe custody, record, and supervisor approval before transactions begin.

40 Sample voids, refunds, discounts, overrides, no-sale transactions, and manual entries for authorization and evidence.

CRITICAL | EXCEPTION TRANSACTION SAMPLE

Area	Observed	Impact	Owner	Due

Execution tip: Sample higher-risk transactions by operator, reason, authorization, and evidence.

41 Confirm card, cash, QR, gift card, loyalty, refund, and receipt workflows operate correctly.

CRITICAL | PAYMENT WORKFLOW TEST

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Test required payment, loyalty, refund, and receipt flows using approved scenarios.

42 Review over or short results, cash pickups, deposits, banking, and unresolved transaction exceptions.

CRITICAL | CASH AND TRANSACTION REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Record variance, cause, owner, investigation status, deposit reference, and next action.

8. Safety, security, facilities, and housekeeping

43 Check emergency exits, extinguishers, alarms, signs, first-aid supplies, and evacuation routes are accessible. CRITICAL | EMERGENCY EQUIPMENT CHECK

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Verify access, status, signage, and readiness rather than confirming presence only.

44 Inspect floors, aisles, stairs, storage, spills, trip hazards, and unsafe conditions for immediate action. CRITICAL | HAZARD WALK + ACTION

Finding	Priority	Owner	Due	Evidence

Execution tip: Contain immediate hazards before continuing and attach evidence of the condition and control.

45 Confirm CCTV, intrusion alarms, panic devices, EAS gates, locks, keys, and access controls are operational. CRITICAL | SECURITY SYSTEM TEST

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Test agreed devices and record fault, impact, interim control, ticket, owner, and due time.

46 Review visitors, contractors, restricted areas, high-value stock, and after-hours access controls. CRITICAL | ACCESS CONTROL REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Sample keys, cards, visitors, contractors, and restricted-area logs for authorization and return.

47 Inspect washrooms, waste areas, pest controls, HVAC, lighting, utilities, and housekeeping standards. FACILITY AND HOUSEKEEPING SCORE

Compliant | Partially compliant | Non-compliant | Create action

Execution tip: Separate cosmetic issues from failures that affect customers, employees, products, or trading.

48 Record equipment faults, damaged assets, maintenance needs, downtime, interim controls, and ticket ownership. MAINTENANCE ACTION GRID

Area	Observed	Impact	Owner	Due

Execution tip: Record asset, fault, location, downtime, temporary control, ticket, owner, and deadline.

9. Tasks, issues, records, and compliance

49 Review all scheduled daily tasks and confirm completed, overdue, missed, and reassigned items.

CRITICAL · TASK COMPLETION DASHBOARD

Area	Observed	Impact	Owner	Due

Execution tip: Review completed, overdue, missed, reassigned, and blocked tasks by shift and owner.

50 Check opening, cleaning, temperature, safety, cash, stock, and compliance records are complete and supported by evidence.

DAILY RECORD SAMPLE

Area	Observed	Impact	Owner	Due

Execution tip: Check timeliness, evidence, accuracy, missed entries, and supervisor review across required records.

51 Verify required licences, permits, certificates, SOPs, policies, and statutory notices are current and accessible.

CRITICAL · DOCUMENT AND LICENCE CHECK

Compliant · Partially compliant · Non-compliant · Create action

Execution tip: Verify version, validity, display, accessibility, and local applicability.

52 Review open incidents, maintenance tickets, customer complaints, delivery discrepancies, and operational exceptions.

CRITICAL · OPEN ISSUE REVIEW

Area	Observed	Impact	Owner	Due

Execution tip: Prioritize incidents and tickets by safety, customer, compliance, stock, cash, and operating impact.

53 Confirm every material issue has an owner, priority, due time, evidence requirement, and escalation path.

CRITICAL · CORRECTIVE ACTION GRID

Area	Observed	Impact	Owner	Due

Execution tip: Require issue, priority, owner, due time, evidence, escalation, and closure standard.

54 Escalate critical, repeated, overdue, or high-impact issues to the correct regional or support-team owner.

CRITICAL · ESCALATION CONFIRMATION

Finding	Priority	Owner	Due	Evidence

Execution tip: Record who was informed, when, required response, current status, and next escalation point.

10. Closing review, actions, and management sign-off

55 Review the day's sales, service, stock, cash, safety, task, and incident results with the duty manager.
DAILY PERFORMANCE SUMMARY

OBSERVATION | Enter factual notes

Execution tip: Review daily results by area and keep critical exceptions visible regardless of the average score.

56 Confirm all critical failures are contained, corrected, or formally escalated before the shift closes.
CRITICAL · CRITICAL CONTAINMENT CHECK

Finding	Priority	Owner	Due	Evidence

Execution tip: Do not close the shift until immediate risks are contained or formally escalated.

57 Record strong execution, recurring gaps, missed controls, and priorities for the next shift.
SHIFT LEARNING SUMMARY

OBSERVATION | Enter factual notes

Execution tip: Record strong execution, recurring gaps, missed controls, and next-shift priorities.

58 Complete the shift handover with open actions, customer commitments, deliveries, maintenance, and staffing risks.
CRITICAL · STRUCTURED HANDOVER RECORD

Area	Observed	Impact	Owner	Due

Execution tip: Include open actions, customer commitments, deliveries, cash, maintenance, staffing, and risks.

59 Obtain manager acknowledgement of findings, owners, due times, open risks, and support required.
CRITICAL · MANAGER SIGNATURE + TIMESTAMP

NAME | Enter
SIGNATURE | Sign
SUBMITTED | Timestamp

Execution tip: Review results, owners, due times, open risks, and support needs before signing.

60 Complete reviewer approval with final status, critical-item result, next review time, and submission timestamp.
CRITICAL · REVIEWER APPROVAL + NEXT REVIEW

NAME | Enter
SIGNATURE | Sign
SUBMITTED | Timestamp

Execution tip: Confirm final status, critical result, escalation, and next review time before submission.