FREE OPERATIONAL TEMPLATE

Planogram Compliance Checklist

Use this 60-point checklist to verify store-specific planograms, fixtures, assortment, SKU positions, facings, labels, pricing, availability, promotions, evidence, and action closure.

Store / location	Review date	Category / bay	Reviewer / manager

1. Planogram scope, version control, store applicability, and ownership

1 Confirm the store, department or category, planogram ID and version, effective date, reviewer, store manager, and review window. APPROVAL

NAME	DATE / TIME	APPROVAL
Enter	Enter	Sign

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

2 Verify the latest approved planogram, shelf map, product list, fixture dimensions, and reference images are available. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

3 Confirm the assigned planogram matches the store format, cluster, fixture size, assortment, and approved local range. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

4 Define priority categories, promotional windows, launches, seasonal changes, and the required completion deadline. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

5 Review previous compliance scores, unresolved deviations, stockouts, substitutions, and approved exceptions. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

6 Define critical failures, scoring, evidence, escalation, correction, and final sign-off rules. CRITICAL SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Confirm the correct store-specific planogram, version, assortment, fixture, evidence rules, and approval owner before shelf work begins.

2. Fixture, bay, shelf, peg, and capacity readiness

7 **Inspect the bay, gondola, wall, shelves, pegboard, hooks, trays, dividers, and label rails for cleanliness and damage.** SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

8 **Measure usable bay width, height, depth, shelf count, and shelf positions against the approved planogram.** MEASUREMENT

ACTUAL Enter | PLAN Enter | UNIT / SKU Enter

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

9 **Verify fixtures are stable, safely loaded, correctly assembled, and do not block routes or emergency equipment.** CRITICAL SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

10 **Confirm shelf heights, peg spacing, dividers, pushers, risers, and display aids match the plan.** MEASUREMENT

ACTUAL Enter | PLAN Enter | UNIT / SKU Enter

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

11 **Check the fixture can hold planned facings and stock without overhang, crushing, leaning, or unsafe stacking.** SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

12 **Record missing, broken, incompatible, or locally modified fixtures and the correction required.** SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Check the physical bay before merchandising so shelf dimensions, fixture condition, capacity, and safety do not prevent correct execution.

3. Assortment, SKU mapping, range status, and approved substitutions

13 Verify each listed SKU, barcode or GTIN, pack size, variant, flavor or color, and description matches the planogram. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

14 Confirm new, seasonal, promotional, private-label, and priority SKUs are included in their approved positions. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

15 Remove delisted, discontinued, expired, recalled, unauthorized, or non-ranged products from the bay. CRITICAL SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

16 Use substitute products only under an approved rule and confirm they do not displace priority SKUs. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

17 Record unavailable SKUs, reason, expected replenishment date, and temporary presentation method. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

18 Confirm assortment changes and approved local exceptions are documented with owner and review date. APPROVAL

NAME Enter | DATE / TIME Enter | APPROVAL Sign

Execution tip: Use current master data and product identifiers so every listed SKU, pack, variant, and range decision is executed accurately.

4. Product position, sequence, blocking, facings, and shelf capacity

19 Place products on the correct shelf or peg in the approved left-to-right or top-to-bottom sequence.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

20 Verify shelf position, eye-level placement, brand block, vertical or horizontal block, and hierarchy match the plan.

SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

21 Count facings for sampled SKUs and compare planned facings with actual facings.

ACTUAL VS PLAN

READING	TARGET	VARIANCE
Enter	Enter	Enter

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

22 Confirm product depth, stack height, peg quantity, and display capacity stay within approved limits.

MEASUREMENT

ACTUAL	PLAN	UNIT / SKU
Enter	Enter	Enter

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

23 Face products forward, align packs consistently, keep branding visible, and maintain front-edge positioning.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

24 Check no SKU expands into another SKU space, hides a label, or occupies an unapproved position.

SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Compare the physical shelf with the plan from a consistent viewpoint and count positions and facings instead of relying only on visual impression.

5. Shelf labels, pricing, promotions, product information, and legal communication

25 Match every shelf label, price ticket, promotional flag, and product information card to the correct SKU.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

26 Verify displayed price, unit price, offer dates, member price, and promotional mechanics match current POS records.

CRITICAL | SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

27 Confirm label sequence follows product sequence and each label sits directly below or beside the correct item.

SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

28 Check barcodes, QR codes, legal notices, age restrictions, allergen, or regulated information where applicable.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

29 Remove expired, duplicated, handwritten, damaged, or conflicting shelf communication.

SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

30 Record pricing or label discrepancies, contain customer impact, and assign immediate correction.

CRITICAL | RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Trace each displayed product to its label and current price file so customers receive accurate, readable, and compliant information.

6. On-shelf availability, replenishment, stockouts, and space allocation

31 Count empty facings and distinguish true stockouts from replenishment, receiving, or execution gaps. ACTUAL VS PLAN

READING Enter | TARGET Enter | VARIANCE Enter

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

32 Replenish backroom stock to the correct SKU position without changing approved facings or sequence. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

33 Verify minimum presentation stock, shelf capacity, case-pack fit, and replenishment frequency support the plan. MEASUREMENT

ACTUAL Enter | PLAN Enter | UNIT / SKU Enter

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

34 Use approved out-of-stock markers or space-management rules without spreading adjacent products. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

35 Check excess stock is not blocking routes, stored unsafely, or creating unauthorized secondary displays. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

36 Review recurring stockouts, overstocks, shelf-capacity issues, and planogram changes needing central support. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Separate true stockouts from execution gaps and preserve the approved shelf allocation while replenishing or managing unavailable products.

7. Product condition, shelf presentation, packaging, and merchandising aids

37 Inspect product condition, packaging, seals, dates, cleanliness, damage, and saleability before facing. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

38 Ensure products are upright, correctly oriented, easy to remove, and not hidden behind packaging or shelf equipment. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

39 Verify trays, shelf-ready packaging, caps, cartons, and display-ready cases are opened and positioned correctly. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

40 Clean shelves, rails, strips, dividers, pushers, and label holders before final evidence is captured. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

41 Confirm fragile, heavy, high-value, regulated, chilled, or hazardous products follow category safety rules. CRITICAL SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

42 Check anti-theft devices, testers, samples, and security tags do not obscure products, branding, or labels. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Protect product saleability and visibility by reviewing package condition, shelf cleanliness, orientation, shelf-ready packaging, and display aids.

8. Category flow, adjacency, cross-merchandising, and promotional execution

43 Verify category flow, subcategory sequence, brand blocking, size or price architecture, and shopper navigation match the plan. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

44 Confirm complementary adjacencies and cross-merchandising are approved and do not reduce core assortment space. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

45 Check promotional displays, endcaps, power wings, dump bins, and secondary placements match the campaign brief. SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

46 Verify promotional stock, price communication, start and end dates, and removal instructions are current. CRITICAL SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

47 Confirm local additions, supplier displays, clip strips, and free-standing units have documented approval. RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

48 Review whether space allocation and shelf location remain practical for demand, replenishment, and customer access. SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Review the complete shopper journey so category sequence, adjacencies, promotions, and secondary displays support the approved commercial logic.

9. Live evidence, compliance scoring, deviations, exceptions, and store feedback

49 Capture wide-angle photos of each bay plus close-ups of labels, facings, stockouts, and deviations.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

50 Compare the completed bay with the planogram and record compliance by SKU, position, facings, labels, and availability.

RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

51 Classify deviations as critical, major, minor, approved exception, or not applicable using approved rules.

CRITICAL | SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

52 Record physical constraints such as wrong fixture size, missing shelf, local obstruction, or assortment mismatch.

RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

53 Submit store feedback when the planogram cannot be executed safely, accurately, or within available space.

APPROVAL

NAME Enter | DATE / TIME Enter | APPROVAL Sign

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

54 Confirm the reviewer, store manager, and category or visual owner agree on exceptions and the correction plan.

APPROVAL

NAME Enter | DATE / TIME Enter | APPROVAL Sign

Execution tip: Capture consistent wide-angle and detailed evidence, then classify every variance and document constraints that prevent accurate execution.

10. Corrective actions, reinspection, trend review, and management sign-off

55 Assign each deviation to a named owner with priority, due date, required proof, and escalation route.

CRITICAL | RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.

56 Correct wrong products, positions, facings, labels, stock gaps, fixtures, or promotional materials.

SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.

57 Recheck the full bay after correction and confirm no secondary issue was introduced.

SCORED RESPONSE

Compliant | Partial | Non-compliant | N/A

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.

58 Verify closure through new live photos, SKU and facing counts, price checks, and reviewer approval.

CRITICAL | SCORED + PHOTO

Meets plan | Needs correction | Non-compliant | Add live photo

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.

59 Review recurring deviations, late changes, stock constraints, and stores needing training or planogram redesign.

RECORD TABLE

Record	Expected	Observed	Owner	Action

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.

60 Record the final compliance score, critical failures, approved exceptions, next review date, and signatures.

CRITICAL | APPROVAL

NAME	DATE / TIME	APPROVAL
Enter	Enter	Sign

Execution tip: Keep deviations open until new evidence confirms the shelf matches the approved plan or a documented exception has been accepted.