

FREE PROMOTION COMPLIANCE TEMPLATE

Promotion Compliance Checklist

Use this 60-point checklist to verify campaign setup, promotional prices, POS offer logic, shelf labels, POSM, product availability, displays, digital channels, staff awareness, checkout, expiry, corrective action, and final sign-off.

Adapt pricing, advertising, offer terms, and customer communication checks to the laws and policies that apply in each market.

Store / location

Campaign / promotion

Review date

Reviewer / campaign owner

1. Promotion setup, campaign brief, dates, scope, ownership, and approval status

- 1** Confirm the store, review date, reviewer, promotion name, campaign ID, start date, end date, channels, departments, and product categories included in the promotion.

PROMOTION COMPLIANCE

REVIEWER

Enter

DATE / TIME

Enter

SIGN-OFF

Sign

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

- 2** Verify the store is using the latest approved promotion brief, artwork, product list, price file, offer mechanics, exclusions, customer terms, and execution instructions.

CRITICAL

PROMOTION COMPLIANCE

Offer / Area

Actual

Evidence

Owner

Action

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

- 3** Confirm the promotion has the required internal approvals and that any local changes, substitutions, extensions, or exceptions are documented and authorized.

PROMOTION COMPLIANCE

Compliant

Partial

Gap

N/A

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

- 4** Check the correct start and end dates are configured across store communication, POS, digital screens, labels, and staff instructions.

CRITICAL

PROMOTION COMPLIANCE

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

- 5** Identify critical promotion failures such as wrong price, expired promotion, misleading offer communication, unavailable hero product, or checkout mismatch.

CRITICAL

PROMOTION COMPLIANCE

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

- 6** Assign ownership for pricing, POS setup, signage, stock, merchandising, digital content, staff briefing, customer complaints, and corrective-action closure.

PROMOTION COMPLIANCE

Offer / Area

Actual

Evidence

Owner

Action

● Execution tip: Start with the approved campaign brief and price file. Promotion compliance is difficult to judge if stores are working from different versions.

2. Promotional price accuracy, discounts, bundles, offer mechanics, and POS configuration

7 Verify promotional prices for sampled products match the approved campaign price list and are active for the correct campaign period.

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

8 Check percentage discounts, fixed discounts, multi-buy offers, bundles, buy-one-get-one mechanics, coupons, loyalty offers, and other promotion rules calculate correctly.

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

9 Confirm minimum spend, quantity thresholds, membership requirements, product combinations, or other eligibility conditions are configured correctly in the POS system.

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

10 Run or review a sample transaction to confirm the expected promotional price or benefit appears automatically without unnecessary manual intervention.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

11 Check promotion stacking, exclusions, employee discounts, loyalty benefits, coupons, and other overlapping offers behave according to the approved campaign rule.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

12 Record price mismatches, incorrect discount logic, failed bundles, unsupported manual overrides, or other POS configuration gaps affecting the promotion.

PROMOTION COMPLIANCE

CRITICAL

Offer / Area

Actual

Evidence

Owner

Action

● Execution tip: Always test a sample transaction for high-value or complex offers. A display can look correct while the POS logic still gives the wrong result.

3. Shelf labels, price tags, promotional signage, POSM, and customer-facing communication

- 13 Verify shelf labels, product tags, promotional tickets, posters, wobblers, shelf strips, table cards, banners, and other POSM use the current approved promotion artwork.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

- 14 Check displayed promotional prices and offer terms match the POS configuration and approved campaign brief for sampled products.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

- 15 Confirm offer dates, eligibility rules, exclusions, quantity limits, membership conditions, or other important customer terms are visible where required by the campaign.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

- 16 Remove old, expired, duplicated, damaged, handwritten, locally altered, or conflicting promotional materials from customer-facing areas.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

- 17 Inspect sign holders, frames, adhesive, clips, display stands, digital panels, and other promotional hardware for clean and professional presentation.**

PROMOTION COMPLIANCE

Compliant

Partial

Gap

N/A

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

- 18 Record missing signage, wrong price communication, incorrect offer terms, poor placement, damaged POSM, or conflicting customer messages.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Customer communication should match checkout reality. Check price, dates, terms, and product scope together rather than reviewing each sign in isolation.

4. Product availability, campaign stock, replenishment, substitutions, and out-of-stock handling

- 19** Verify hero products, promoted SKUs, advertised variants, bundle components, gifts, samples, and other campaign-critical stock are available for customers.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

- 20** Check promotional stock is replenished in priority areas and not left in the stockroom while customer-facing displays are empty or incomplete.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

- 21** Confirm stock quantities, size or color runs, bundle components, and required supporting items are sufficient for the current trading period where applicable.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

- 22** Review out-of-stock promoted items and verify approved substitution, alternative, customer communication, or replenishment action is being followed.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

- 23** Check unavailable promotional products are not continuing to be advertised without the approved customer communication or alternative handling.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

- 24** Record critical stockouts, missing bundle components, poor replenishment, unauthorized substitutions, or other availability gaps affecting the promotion.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Promotions fail quickly when stock is unavailable. Prioritize hero products, bundle components, gifts, and advertised variants in replenishment checks.

5. Promotional display, placement, planogram, featured products, and visual execution

- 25** Verify promotional displays are located in the approved zones such as windows, entrance tables, endcaps, gondolas, feature walls, counters, or checkout areas.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

- 26** Check featured products, hero SKUs, promotional bundles, gifts, or campaign assortments are placed in the specified position, sequence, and quantity.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

- 27** Confirm planograms, facings, shelf share, product blocking, cross-merchandising, and category adjacency follow the approved promotional execution.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

- 28** Check locally added products, extra signage, stock overflow, unrelated merchandise, or temporary fixtures do not dilute the intended campaign story.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

- 29** Verify display fixtures, shelves, tables, props, risers, hooks, hangers, digital screens, and promotional units are clean, aligned, and in good condition.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

- 30** Record incorrect placement, missing hero products, weak facings, clutter, over-merchandising, poor display condition, or other campaign-execution gaps.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Review the display from the customer's normal approach. Promotional placement should be visible, easy to understand, and free from competing messages.

6. Digital screens, online references, QR codes, app or web offers, and omnichannel consistency

- 31 Verify digital screens, kiosks, tablets, QR codes, customer displays, or in-store digital media show the correct current promotion and approved creative.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

- 32 Check QR codes, links, landing pages, app references, offer codes, or digital call-to-action elements work and lead to the intended promotion experience.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

- 33 Confirm promotion names, prices, dates, products, offer mechanics, and customer terms are consistent between in-store communication and connected digital channels where applicable.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

- 34 Check expired media, blank screens, broken links, wrong artwork, incorrect language, outdated prices, or failed QR experiences are removed or corrected.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

- 35 Verify employees know how to help customers when an online, app, loyalty, or digital promotion does not appear correctly in-store.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

- 36 Record digital mismatches, broken links, stale content, incorrect prices, or omnichannel inconsistencies that can confuse customers.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Test every digital call to action. A QR code or online reference that does not work creates an immediate customer-trust problem even if the store display is correct.

7. Staff awareness, promotion briefing, customer explanation, eligibility, and service handling

- 37 Confirm relevant employees have been briefed on the promotion before or at launch and understand the offer objective, dates, products, and customer journey.**

PROMOTION COMPLIANCE

CRITICAL

Offer / Area	Actual	Evidence	Owner	Action

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

- 38 Check employees can explain the promotion accurately, including price, eligibility, exclusions, bundle logic, loyalty conditions, and redemption steps where applicable.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

- 39 Verify employees know how to handle common customer questions about stock, price mismatch, coupon use, offer eligibility, returns, substitutions, or expired promotions.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

- 40 Confirm frontline employees know when a manager approval, escalation, manual adjustment, or customer-service intervention is required.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

- 41 Check employees do not make unsupported promises, invent local offer terms, incorrectly extend campaign dates, or apply unauthorized discounts.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

- 42 Record training gaps, inconsistent explanations, policy confusion, incorrect redemption handling, or other staff-related promotion failures.**

PROMOTION COMPLIANCE

CRITICAL

Offer / Area	Actual	Evidence	Owner	Action

● Execution tip: Ask employees to explain the offer in their own words. If staff cannot explain eligibility and exceptions clearly, customers are likely to receive inconsistent information.

8. Checkout verification, receipt accuracy, refunds, returns, complaints, and customer resolution

- 43 Verify the final transaction reflects the approved promotional price, discount, bundle, loyalty benefit, gift, or other campaign reward correctly.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

- 44 Check the receipt or transaction summary clearly reflects the expected promotion outcome where the system provides this information.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

- 45 Review recent promotion-related refunds, returns, voids, price overrides, complaints, or manual adjustments for correct authorization and supporting evidence.**

PROMOTION COMPLIANCE

CRITICAL

DISPLAY / ACTUAL

Enter

POS / EXPECTED

Enter

RESULT

Record

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

- 46 Confirm return, refund, exchange, cancellation, or warranty handling for promoted products follows the approved customer policy and promotion terms.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

- 47 Verify customer complaints about promotion price, availability, eligibility, signage, or checkout mismatch are resolved using the approved escalation and recovery process.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

- 48 Record repeated checkout corrections, unsupported overrides, unresolved disputes, refund confusion, or other transaction-close failures linked to the promotion.**

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Trace a real promotion from shelf to receipt. This is the fastest way to verify display, pricing, POS configuration, customer explanation, and checkout together.

9. Campaign timing, launch readiness, expiry, removal, change control, and post-promotion closeout

- 49** Confirm all promotion materials, POS configurations, displays, stock, digital media, and staff instructions were ready before the approved launch time.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

- 50** Verify the promotion is not displayed or applied before the approved start time unless an authorized early-launch instruction exists.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

- 51** Check expired promotions, shelf labels, POSM, digital media, offer codes, and temporary display elements are removed or deactivated promptly after the end date.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

- 52** Confirm any mid-campaign price, product, artwork, mechanic, date, or term change is communicated, approved, and updated consistently across all affected store touchpoints.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

- 53** Verify remaining promotional stock, gifts, signage, returns, customer commitments, and post-campaign activities are handled using the approved closeout process.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

- 54** Record early launch, delayed activation, expired communication, incomplete removal, unmanaged changes, or other timing and closeout failures.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Launch and expiry discipline matters as much as the promotion itself. Old offers left visible after the end date can create immediate customer disputes.

10. Evidence, scoring, corrective actions, trend review, campaign learning, and final sign-off

- 55** Capture clear evidence for key promotional checks and failures, including shelf labels, displays, product availability, POS transactions, digital content, or corrected-state photos as required.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

- 56** Score each promotion section consistently and distinguish minor execution gaps from critical failures that directly affect price, customer trust, campaign integrity, or checkout.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

- 57** Record every failed check with the approved requirement, actual condition, location, affected product or offer, customer impact, and immediate correction completed where possible.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

- 58** Assign each promotion gap to a named pricing, store, VM, inventory, marketing, IT, digital, or operations owner with priority, due date, evidence requirement, and escalation route.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

- 59** Verify closure using corrected prices, test transactions, updated photos, replenishment proof, replaced signage, digital updates, retraining evidence, or other objective proof.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Partial

Gap

N/A

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

- 60** Record the final promotion-compliance score, unresolved critical issues, action status, campaign learnings, next review date, reviewer, store manager, campaign owner, date, time, and sign-off.

PROMOTION COMPLIANCE

CRITICAL

Compliant

Needs action

Critical

EVIDENCE

Add

● Execution tip: Close promotion findings with proof. Trend repeat issues by campaign type, store, region, pricing setup, stock availability, and execution owner to improve future launches.

RUN THIS CHECKLIST DIGITALLY

Make every promotion match the approved offer from display to checkout

Use Taqtics to schedule promotion checks, capture live evidence, test prices at checkout, escalate mismatches, assign corrective actions, verify closure, and compare campaign execution across every location.