

RETAIL OPERATIONS TEMPLATE LIBRARY

Retail Checklist Library

20 practical templates with 100 checklist question ideas, recommended input types, scheduling guidance, and execution tips.

Daily Store Operations

01 Retail Store Checklist

Use for: A master checklist for brands that want one complete store operations routine. Recommended schedule: Daily, by opening, service, and closing shift

- 1

Was the store opened within the approved trading readiness window?

Geo-location + timestamp
- 2

Are the sales floor, entrance, fitting rooms, and customer areas ready?

Section score + live photos
- 3

Are priority products replenished and priced correctly?

SKU count + variance
- 4

Are POS, cash, devices, and connectivity ready for trading?

System test + evidence
- 5

Were all open issues assigned to an owner with a due time?

Action point grid

 Execution Tip: Split the master checklist by shift and role. Keep critical safety, cash, and customer-impacting failures visible until they are closed.

02 Store Opening Checklist

Use for: Daily readiness checks before customers are allowed into the store. Recommended schedule: Before trading, within a fixed opening window

- 1

Did the opening employee arrive and access the store on time?

Geo-location + timestamp
- 2

Are exterior access points, shutters, alarms, and emergency exits secure?

Status + live photo
- 3

Are lighting, HVAC, internet, POS, and required equipment operational?

Multiple system check
- 4

Are staff present, groomed, briefed, and assigned to opening zones?

Roster + assignment
- 5

Is the store ready to open without unresolved critical blockers?

Opening decision + sign-off

 Execution Tip: Schedule the checklist before trading. Escalate late access and critical readiness failures to the store manager and area manager before opening approval.

Daily Store Operations

03 Store Closing Checklist

Use for: Daily closeout, shutdown, cash, security, and handover controls.

Recommended schedule: After customer clearance and before final lockup

1	Were all customers cleared and final transactions completed correctly?	Timestamp + status
2	Were cash, card, wallet, refund, and POS totals reconciled?	Numeric variance
3	Were high-value products, keys, documents, and cash secured?	Security check + photo
4	Were equipment, utilities, access points, alarms, and shutters closed correctly?	Shutdown checklist
5	Were open issues handed over with an owner, deadline, and escalation path?	Handover action grid

 **Execution Tip:** Make the final lockup and alarm confirmation time-sensitive. Require live evidence for security exceptions and manager sign-off before the checklist can close.

04 End of Day Handover Checklist

Use for: A structured handover between shifts, store teams, and the next-day manager.

Recommended schedule: At shift handover or end of trading day

1	What customer, stock, maintenance, cash, or safety issues remain open?	Issue category grid
2	Which actions are due before the next shift or next opening?	Owner + due time
3	Were cash, keys, devices, and restricted items handed over securely?	Controlled handover sign-off
4	What stock shortages or replenishment risks require follow-up?	SKU issue list
5	Did the receiving manager acknowledge the handover?	Signature + timestamp

 **Execution Tip:** Keep the handover structured by issue category. Do not rely on free-text notes alone. Every open item should have an owner and due time.

Store Standards and Customer Experience

05 Store Inspection Checklist

Use for: A broad store condition and operational standards inspection.

Recommended schedule: Weekly, monthly, or during scheduled store visits

1	Does the exterior, entrance, and storefront meet the approved standard?	Score + live photos
2	Are sales floor cleanliness, accessibility, fixtures, and customer flow acceptable?	Section rating
3	Are pricing, signage, promotions, and displays accurate?	Sample check + evidence
4	Are safety, security, emergency, and maintenance controls functional?	Critical status checks
5	Were findings converted into assigned corrective actions?	Action point register

 **Execution Tip:** Use a fixed photo list and consistent scoring scale so regional teams can compare stores fairly. Critical findings should bypass average scores and escalate immediately.

06 Store Audit Checklist

Use for: Formal compliance, SOP, operational, and management control audits.

Recommended schedule: Monthly, quarterly, or risk-based

1	Are required policies, licenses, records, and approvals current and available?	Document check + expiry
2	Are store procedures followed consistently across shifts and roles?	Scored observation
3	Do physical conditions and records support the submitted answers?	Evidence verification
4	Are repeated findings and overdue actions visible to management?	Trend + action status
5	Has the store manager reviewed and accepted the audit findings?	Manager acknowledgement

 **Execution Tip:** Combine objective evidence, observation, and document review. Use weighted scoring for high-risk sections and require closure proof for non-compliance.

Store Standards and Customer Experience

07 Store Visit Checklist

Use for: A practical structure for coaching, review, and follow-up during store visits.

Recommended schedule: Every area manager or leadership visit

1	What were the visit objective, store context, and current performance risks?	Visit setup fields
2	What did the manager observe across customer experience, operations, and team execution?	Observation notes + score
3	Which strengths should be recognized and repeated?	Positive observation log
4	Which gaps require coaching, correction, or head-office support?	Action classification
5	Did the store manager agree to owners and deadlines?	Joint sign-off


Execution Tip: Separate coaching observations from compliance failures. Keep action items specific, owned, dated, and visible in the next store visit.

08 Mystery Shopper Audit Checklist

Use for: An anonymous customer journey and service experience evaluation.

Recommended schedule: Monthly, quarterly, or campaign-based

1	Was the customer acknowledged and greeted within the expected time?	Timer + observation
2	Did staff understand the need and recommend suitable products?	Scored narrative
3	Were pricing, promotions, availability, and product information clear?	Sample verification
4	Was checkout accurate, efficient, and professionally handled?	Transaction time + score
5	What specific moments improved or damaged the customer experience?	Narrative + evidence


Execution Tip: Use time stamps and structured observations, not broad impressions. Keep visit identity private and require examples for unusually high or low scores.

Store Standards and Customer Experience

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Staff Grooming Audit Checklist

Use for: Role-based hygiene, uniform, presentation, and customer-facing readiness checks.

Recommended schedule: At shift start and during manager observations

1	Is personal hygiene suitable for the employee role and work area?	Role-based observation
2	Is the uniform clean, complete, correctly fitted, and damage-free?	Status + comment
3	Are name badges, footwear, accessories, and PPE compliant?	Multiple selection
4	Does customer-facing presentation match the brand standard?	Scored observation
5	Was coaching or corrective action recorded privately where required?	Coaching action log



Execution Tip: Use role-specific standards and privacy-aware evidence. Record coaching and follow-up without exposing unnecessary personal information.

Merchandising, Inventory, and Facilities

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Visual Merchandising Audit Checklist

Use for: Campaign, planogram, display, signage, and store presentation compliance.

Recommended schedule: Campaign launch, weekly, and during store visits

1	Do windows, entrance displays, and campaign zones match the approved guide?	Reference comparison + photo
2	Are planograms, product placement, facings, and fixture capacities followed?	Score + count
3	Are pricing, labels, promotional signs, and digital content correct?	Sample check + evidence
4	Are mannequins, styling, lighting, graphics, and housekeeping on standard?	Section score + photo set
5	Were deviations assigned with priority and correction deadline?	Corrective action



Execution Tip: Show reference images inside each question and require live photos from fixed angles. This makes comparison across stores faster and more reliable.

Merchandising, Inventory, and Facilities

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Retail Stock and Inventory Checklist

Use for:

Shelf availability, stockroom, receiving, transfers, counts, and variance control.

Recommended schedule:

Daily replenishment, weekly cycle count, and month-end stocktake

1	Are priority and fast-moving SKUs available on the sales floor?	SKU count + status
2	Do physical quantities match system stock for the selected sample?	Numeric variance
3	Are receiving, transfer, return, and damage records complete?	Document reference grid
4	Is the stockroom organized, labeled, accessible, and safely stacked?	Zone score + photo
5	Were material stock variances investigated and assigned?	Variance action log

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Execution Tip:

Define the SKU sample and tolerance before execution. Require recount, reason, owner, and review when variance exceeds the accepted limit.

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Price Accuracy Audit Checklist

Use for:

Shelf label, promotional price, POS, tax, and offer accuracy checks.

Recommended schedule:

Daily sample, campaign launch, and weekly audit

1	Does the shelf label match the product, SKU, pack size, and barcode?	SKU sample check
2	Does the POS price match the displayed shelf price?	Test transaction
3	Are promotions, bundles, discount conditions, and dates displayed correctly?	Offer validation
4	Are old or expired price tickets and signs removed?	Photo proof + status
5	Were systemic price mismatches escalated beyond the sampled item?	Issue classification

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Execution Tip:

Use a defined sample by category and promotion. Capture expected price, actual price, SKU, location, receipt, and correction evidence.

Merchandising, Inventory, and Facilities

13 Store Cleaning Checklist

Use for: Customer areas, high-touch points, backroom, washrooms, and cleaning records. Recommended schedule: Opening, scheduled service intervals, and closing

1	Are entrances, floors, fixtures, counters, and customer areas clean?	Area checklist + photo
2	Were high-touch surfaces cleaned at the required interval?	Timestamp + completion
3	Are washrooms clean, stocked, odor-free, and recorded?	Status + time
4	Are cleaning tools, chemicals, and waste areas controlled safely?	Condition check
5	Were missed or failed cleaning checks assigned for immediate correction?	Action point

 **Execution Tip:** Schedule time-sensitive cleaning checks and escalate missed windows. Use live photos only where they add proof and do not create privacy concerns.

14 Store Maintenance Checklist

Use for: Facilities, fixtures, utilities, assets, defects, and maintenance follow-up. Recommended schedule: Daily visual checks, weekly review, and monthly preventive maintenance

1	Are lighting, HVAC, plumbing, electrical, and utility systems functioning?	Condition + reading
2	Are fixtures, doors, shutters, shelves, and customer equipment safe?	Asset status + photo
3	Are open maintenance tickets prioritized by operational impact?	Ticket register
4	Were preventive maintenance tasks completed within schedule?	Schedule + proof
5	Did the repair restore the asset and remove the business risk?	Closure verification

 **Execution Tip:** Record the asset ID, exact location, impact, temporary control, owner, due date, and closure proof. Separate urgent safety defects from routine repairs.

Safety, Security, and Loss Prevention

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Retail Safety Audit Checklist

Use for: Customer, employee, fire, electrical, equipment, stockroom, and emergency safety.

Recommended schedule: Daily safety walk, weekly inspection, and monthly audit

1	Are entrances, aisles, stairs, and customer pathways free from hazards?	Hazard status + photo
2	Are fire exits, extinguishers, alarms, lighting, and evacuation information accessible?	Critical compliance check
3	Are electrical equipment, utilities, and maintenance conditions safe?	Condition + reading
4	Are stockroom storage and manual handling practices controlled?	Observation score
5	Were hazards contained and assigned within the required response time?	Corrective action + escalation

 Execution Tip: Treat immediate safety risk as a blocker, not a low score. Capture containment, owner, deadline, evidence, and escalation separately.

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Retail Security Audit Checklist

Use for: Access control, alarms, CCTV, keys, restricted areas, incidents, and lockup.

Recommended schedule: Opening, closing, weekly, and incident-driven

1	Are keys, codes, badges, and access permissions controlled and current?	Access register
2	Are CCTV, alarms, EAS, panic buttons, and security devices operational?	System test grid
3	Are restricted rooms, cash areas, loading points, and high-value zones secure?	Zone check + photo
4	Are security incidents documented with evidence and management review?	Incident log
5	Was final lockup completed by authorized staff within the approved window?	Geo-location + timestamp

 Execution Tip: Avoid exposing sensitive security details in shared reports. Route device failures and access exceptions only to authorized owners.

Safety, Security, and Loss Prevention

17 Loss Prevention Audit Checklist

Use for: Internal theft, transaction controls, stock shrink, receiving, CCTV, and incident handling.

Recommended schedule: Monthly, quarterly, and risk-based

1	Are refunds, voids, discounts, overrides, and cancellations authorized?	Transaction sample
2	Do receiving, transfers, damages, and stock adjustments have complete records?	Document verification
3	Are high-value and theft-sensitive products protected as required?	Control status + photo
4	Are inventory variances and suspicious patterns investigated?	Variance analysis
5	Are corrective actions tracked to closure with evidence?	Action status



Execution Tip: Use targeted samples and exception data instead of generic yes or no checks. High-risk failures should trigger immediate investigation and restricted escalation.

POS, Cash, and Transaction Controls

18 POS Functionality Checklist

Use for: Login, product, pricing, payment, refund, receipt, hardware, and shift-close testing.

Recommended schedule: Before opening, after system changes, and during issue investigation

1	Can authorized users log in with the correct role permissions?	Terminal test grid
2	Do barcode, product lookup, pricing, tax, and promotions calculate correctly?	Test transaction
3	Do cash, card, wallet, gift card, and other tenders process correctly?	Payment method test
4	Do returns, refunds, voids, receipts, and loyalty workflows work correctly?	Workflow test + evidence
5	Do reports and reconciliation totals match the test transactions?	Numeric comparison



Execution Tip: Test each critical workflow with defined expected results. Capture terminal ID, user, test data, actual result, error, and support ticket.

POS, Cash, and Transaction Controls

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Cash Reconciliation Checklist

Use for: Drawer, safe, deposit, tender, refund, and POS total reconciliation.

Recommended schedule: Every shift close and end of trading day

1	Does the physical cash count match the POS and expected drawer total?	Expected vs actual
2	Do card, wallet, gift card, and other tender totals match reports?	Tender reconciliation
3	Were refunds, voids, paid-outs, and cash movements authorized?	Exception verification
4	Was the deposit prepared, sealed, recorded, and secured correctly?	Controlled handover
5	Were variances explained, reviewed, and escalated within tolerance rules?	Variance action



Execution Tip: Set tolerance rules and require a reason, reviewer, evidence, and escalation for every material variance. Keep dual control for sensitive cash steps.

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Refunds and Returns Checklist

Use for: Customer returns, refund authorization, item condition, stock updates, and fraud controls.

Recommended schedule: Per transaction review and weekly exception audit

1	Was the return eligible under the approved policy and time limit?	Policy verification
2	Was proof of purchase, customer identity, or required documentation checked?	Document check
3	Was the returned item condition and disposition recorded correctly?	Condition + photo
4	Was the refund method, amount, and approval level correct?	Transaction validation
5	Did inventory, finance, and exception reports update correctly?	System confirmation



Execution Tip: Capture reason codes, product condition, approval level, transaction reference, and disposition. Escalate repeated exceptions by employee, product, or store.

Run these checklists across every retail store

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