

Store audit

PASS · 89%

- ✓ Must-stock SKUs on shelf Critical
- ✓ Facings match planogram Major
- ✗ Promo price is correct Critical
- ✓ Display in agreed place Major
- ✓ Price tag under each SKU Major
- ✓ POSM undamaged Minor

Brand-side retail audit

for field reps, merchandisers and agencies

FREE TEMPLATE

Store Audit Checklist

A ready-to-use retail audit template with weighted scoring and knock-out items. Follow the route through the store, tick Yes / No / N/A, and get a score you can compare across stores.

47

checks

9

blocks along
the store route

1

score with
knock-outs

Goods Checker

Retail audit software · goodschecker.com

Fillable PDF

Also in Google Sheets / Excel

How to use this checklist

Prepare the standard first: planograms, must-stock list, price list and promo calendar.

1 Walk the route

Go through blocks 1–9 in order, the way you walk the store. Skip blocks that don't fit your business (see the table below).

2 Answer Yes / No / N/A

One clear answer per item. N/A takes the item out of the score. Take a photo wherever you see the camera icon.

3 Score and act

Add up points on the Score Sheet. Log every failed item with an owner and a deadline, and re-check it next visit.

Legend

Critical · 5

Major · 3

Minor · 1

Info

Priority and points. Critical = direct effect on sales or a paid placement.



Knock-out item: a “No” fails the whole audit, whatever the total score.



Photo required. Shoot the shelf straight on, whole bay in frame, no glare.

Score = points earned ÷ points possible × 100

Items marked N/A are removed from both. Weights are an example: set yours by each item's effect on sales.

Which blocks to keep

	1 Visit	2 Availability	3 Planogram	4 Pricing	5 Promo/POSM	6 Equipment	7 Competitors	8 Store/Staff	9 Actions
FMCG / CPG brand	✓	✓	✓	✓	✓	✓	✓	—	✓
Merchandising agency	✓	✓	✓	✓	✓	✓	✓	—	✓
Pharma brand / pharmacy	✓	✓	✓	✓	✓	—	✓	—	✓
Multi-store retailer	✓	✓	—	✓	✓	—	—	✓	✓

Agencies: add a brand field to each block and build one report per client. Pharma: add OTC placement at checkout and behind-the-counter visibility.

1

Visit Details

fill in before you start

Route stop 1 of 9

Store name and ID _____

Address and store format _____

Retailer or banner _____

Store tier (A / B / C) _____

Date _____

Check-in / check-out time _____

Auditor name _____

Store contact (name, role) _____

Visit type (routine, promo, launch, re-check) _____

Categories in scope _____

2

Product Availability

On-shelf availability (OSA)

max 20 points

Route stop 2 of 9

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
2.1	All must-stock SKUs are on the shelf	Critical · 5	K		☐	☐	☐	_____
2.2	Top-selling SKUs have no empty facings	Critical · 5			☐	☐	☐	_____
2.3	Every missing SKU is listed with a reason, if known	Major · 3			☐	☐	☐	_____
2.4	Backroom stock has been checked for missing SKUs	Info			☐	☐	☐	_____
2.5	The order status of missing SKUs has been recorded	Info			☐	☐	☐	_____
2.6	All products are within the expiration date	Critical · 5			☐	☐	☐	_____
2.7	Products with the earliest expiration dates are in front (FEFO)	Minor · 1			☐	☐	☐	_____
2.8	No damaged or dirty packaging on the shelf	Minor · 1			☐	☐	☐	_____

3

Shelf Placement and Planogram

Planogram compliance

max 26 points

Route stop 3 of 9

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
3.1	Products are in the aisle and section in the planogram	Critical · 5			☐	☐	☐	
3.2	Each SKU is on the correct shelf level	Major · 3			☐	☐	☐	
3.3	Each SKU has the number of facings in the planogram	Major · 3			☐	☐	☐	
3.4	SKUs follow the planogram sequence	Major · 3			☐	☐	☐	
3.5	The brand block is intact	Major · 3			☐	☐	☐	
3.6	Share of shelf meets the agreed level (note actual % and target)	Critical · 5			☐	☐	☐	
3.7	All products face the shopper	Minor · 1			☐	☐	☐	
3.8	No competitor or unrelated products in your space	Major · 3			☐	☐	☐	

4

Pricing and Price Tags

Price compliance

max 17 points

Route stop 4 of 9

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
4.1	Every SKU has a price tag	Major · 3			☐	☐	☐	
4.2	Each tag sits under the correct product	Major · 3			☐	☐	☐	
4.3	The shelf price matches the current store price	Major · 3			☐	☐	☐	
4.4	The promo price is correct	Critical · 5			☐	☐	☐	
4.5	The promo tag shows the correct dates	Minor · 1			☐	☐	☐	
4.6	Tags are readable and undamaged	Minor · 1			☐	☐	☐	
4.7	The unit price on the tag is correct	Minor · 1			☐	☐	☐	

5

Promotions, POSM and Displays

Promo and POSM compliance

max 25 points

Route stop 5 of 9

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
5.1	The promotional display is in place	Critical · 5	K		☐	☐	☐	
5.2	The display is in the agreed location	Major · 3			☐	☐	☐	
5.3	The display is fully stocked	Major · 3			☐	☐	☐	
5.4	The display holds only the promoted SKUs	Major · 3			☐	☐	☐	
5.5	POSM (shelf strips, wobblers, headers) is installed	Major · 3			☐	☐	☐	
5.6	POSM is current (no expired campaigns)	Minor · 1			☐	☐	☐	
5.7	POSM is undamaged	Minor · 1			☐	☐	☐	
5.8	The promotion started on the agreed date	Major · 3			☐	☐	☐	
5.9	Agreed secondary placements exist (endcap, checkout, cross-category)	Major · 3			☐	☐	☐	

6

Trade Equipment

Branded coolers, racks, stands

max 22 points

Route stop 6 of 9

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
6.1	The equipment is in the store	Critical · 5			☐	☐	☐	
6.2	The equipment is in the agreed location	Major · 3			☐	☐	☐	
6.3	The equipment works	Major · 3			☐	☐	☐	
6.4	The equipment is clean	Minor · 1			☐	☐	☐	
6.5	The equipment branding is intact	Minor · 1			☐	☐	☐	
6.6	The equipment holds only your products	Major · 3			☐	☐	☐	
6.7	The cooler temperature is within the required range	Major · 3			☐	☐	☐	
6.8	The equipment is stocked to the planogram	Major · 3			☐	☐	☐	

7

Competitor Activity

information only, not scored

Route stop 7 of 9

COMPETITOR BRAND	SKU	SHELF PRICE	PROMO MECHANICS	DISPLAY / POSM / NEW SKU	PHOTO
e.g. Brand X	Sea Salt Chips 8 oz	\$3.49	2 for \$5	Endcap + wobblers	yes

8

Store Conditions and Staff

Optional, for retailers

max 18 points

Route stop 8 of 9

For retailers that audit their own stores. Brands can skip this block or keep the first two items.

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
8.1	The sales floor and shelves are clean	Major · 3			☐	☐	☐	
8.2	Lighting works in the category area	Minor · 1			☐	☐	☐	
8.3	Aisles are clear of pallets and boxes	Major · 3			☐	☐	☐	
8.4	Staff can answer basic product questions	Minor · 1			☐	☐	☐	
8.5	Emergency exits are clear and marked	Critical · 5			☐	☐	☐	
8.6	Safety equipment is in place and accessible	Critical · 5			☐	☐	☐	

9

Corrective Actions and Sign-Off

Every failed item gets an owner and a deadline

max 3 points

#	CHECK ITEM	PRIORITY	K.O.	PHOTO	YES	NO	N/A	COMMENTS / SKU
9.1	Corrective actions due since the previous audit are completed	Major · 3			☐	☐	☐	

Corrective actions

One row per failed item. Photo before the fix; add an after photo if fixed on site.

BLOCK #	SKU	ISSUE FOUND	ACTION REQUIRED	FIXED ON SITE?	OWNER	DEADLINE	PHOTO
4.4	Classic chips 10 oz	Promo tag shows regular price	Replace with promo tag	No	Store manager	Fri	Before

Sign-off

Store manager name

Signature

Auditor signature

Next visit date



Score Sheet

add up each block, then check the knock-outs

BLOCK	MAX	EARNED	POSSIBLE	SCORE %
2. Product Availability	20	_____	_____	_____
3. Shelf Placement and Planogram	26	_____	_____	_____
4. Pricing and Price Tags	17	_____	_____	_____
5. Promotions, POSM and Displays	25	_____	_____	_____
6. Trade Equipment	22	_____	_____	_____
8. Store Conditions and Staff	18*	_____	_____	_____
9. Corrective Actions and Sign-Off	3	_____	_____	_____
TOTAL	—	_____	_____	_____

* Block 8 counts only if you use it. Brand-side maximum without block 8: 113 points.

Result

Any failed knock-out item (K)?

☐ Yes

☐ No

Pass threshold 80%

Final result

☐ **PASS**

☐ **FAIL**

A store passes only when the score meets the threshold AND no knock-out item failed.

Worked example

40 scored items: 8 critical × 5 + 20 major × 3 + 12 minor × 1 = 112 points.

Two minor items are N/A, so 110 points are possible.

Failed: 1 critical, 4 major, 3 minor = 5 + 12 + 3 = 20 points lost, 90 earned.

Score = $90 \div 110 \times 100 = 81.8\%$: PASS at an 80% threshold. If the failed critical item were a knock-out: FAIL.

TOO MANY STORES FOR A CLIPBOARD?

Let the shelf photo do the counting.

Goods Checker recognizes every SKU in a shelf photo, compares it with the planogram and calculates OSA, facings and share of shelf while the rep is still in the store. Managers see the results on a dashboard by store, region and employee.

up to 98%

recognition accuracy

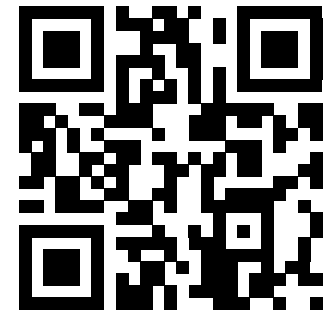
up to 45%

less time on audits
and data processing

100%

of merchandiser
visits processed

According to Goods Checker data.



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