Store Visit Prep Checklist

What a district or area manager should prepare before, during, and after a store visit.

Store: _____ **Date:** _____ **Completed by:** _____

Check each item as you complete it. ★ = high priority.

Before: review the data (night before)

#	Item	Done	N/A	Notes
1	★ Sales vs. plan, vs. last year, vs. district average (last 7 and 28 days)			
2	★ Last audit score and the three lowest-scoring areas			
3	★ Open action items from previous visits, with owner and due date for each			
4	Staffing: today's schedule, open roles, recent hires and terminations			
5	Shrink alerts, inventory adjustments, open receiving discrepancies			
6	Customer complaints and online reviews from the last 30 days			
7	Open maintenance / facilities tickets			
8	Active promotions, planogram resets, and corporate priorities due			
9	Training and compliance completion for the store team			

Before: plan the visit

#	Item	Done	N/A	Notes
10	★ Write down 3 specific things to verify, each tied to something in the data			
11	Decide announced vs. unannounced (aim for a mix over the quarter)			
12	Block 60–90 minutes in store plus 20–30 minutes for the debrief			
13	Book debrief time with the store manager (announced visits)			
14	★ Load the same checklist you scored last visit, so results are comparable			
15	Bring last visit report, charged device, and a way to photograph findings			
16	Note 1–2 specific wins to recognize			
17	Decide the one thing you want the store manager to leave focused on			

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During: on the floor

#	Item	Done	N/A	Notes
18	Walk in as a customer first, before announcing yourself			
19	★ Score every checklist item; no "looks fine"			
20	Photograph every failed item			
21	★ Verify previous action items were actually fixed, not just marked done			
22	Talk to at least two associates, not just the manager			
23	★ Check your 3 planned focus areas specifically			

After: debrief and follow-up

#	Item	Done	N/A	Notes
24	★ Debrief before leaving: wins, findings, commitments			
25	★ Every failed item gets an owner and a due date			
26	Send a written recap within 24 hours			
27	Put a follow-up check on the calendar 5–7 days out			
28	Compare this visit's score to the store's last visit and to peer stores			

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