

SECRETS

Store Manager – Job Handover Checklist

Name: _____

Store: _____

Final Hand over date: _____

Requirements	Completed (sign)	Completion Date
Store Operations - Visits & Communications with Area Leader (Go through last Retail Store Visitation Checklist), Operational responsibilities, Emails etc.		
Intranet – Documents, contents usage and intranet password		
Retail Manager – Operations guide, training, usage, correcting errors, support team memo regarding Lines of Communication etc.		
Month End Checklist / Pack for Finance – to whom & by when		
Processes - Stock tfrs, SOS process, invoicing, checking stock received etc.		
Incentive Program – Letters, Reports, Budget, Communications etc.		
Sales Tracker Workbook - Updating & Maintaining		
Sales Data - Adding to the Intranet (weekly on a Monday)		
Budget Rosters - How & when to prepare		
Individual Budgets Workbook – how to use and who to send to		
Staffing - A detailed list of current staff availabilities, current rosters, competencies, training /skill levels, ongoing training & support etc.		
Staff Management – Leave Forms, Timesheets, HR checklists, staff stock purchase policy, Gifting to staff (budget & appropriateness) etc		
Recruitment – Anything outstanding, responsibility, processes, use of seek, website and/or Recruitment Agents		
Inventory – any issues, stocktakes, security, etc		
Stock Ordering – Run through Checklist & discuss judgement required		
Packaging - Outstanding Orders, Ordering, Budget, forecasts etc.		
Stationary Orders – business cards, wish lists, care cards etc.		
Centre Management - Upcoming events, Participation, Obligations, contacts		

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Local Jeweller – information/invoicing/management/intranet		
Any Shop Fit issues / Repairs & Maintenance (outstanding or awaiting completion)		
Local Area Marketing – NSO support, current campaigns, obligations, Budget		
Customers – Outstanding issues, NSO Customer Support etc.		
Security – Process, opening & closing, who to contact. Update the afterhours security call out. Key returned Email passwords changed (both Store and Admin emails)		
Banking & Petty Cash - Timing, Procedures, security over cash		
NSO – Lines of Communication, Current team structure & availabilities		
Anything else outstanding – Projects / Accounts / Communications		
Daily mail collection – where is the post box, key etc..		

Notes;

Completed by: _____

Approved by: _____

Instructions;

- It is imperative that recruitment activity is undertaken as soon as resignation is known to allow sufficient cross over time for completing job handover
- It is the responsibility of the Area Leader to ensure the departing store manager completes & hands over to incoming store manager during the course of their notice period
- This checklist is intended to be a high level identifier to ensure key tasks are handed over – the store manager needs to go into as much detail as possible on each point to support continuity of the role, and to specifically go through each referred to checklist
- Checklist template to be available on Intranet and is to be continuously updated where necessary by the Area Leader to ensure the document remains current, to capture any tasks that have not yet been listed and for any new new tasks that come into existence.

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Provide to HR once completed for filing on departing staff members employment file