

Retail Audit Checklist

TYPES OF INFORMATION YOU SHOULD BE COLLECTING IN STORE

01

DEMOGRAPHIC

DEMOGRAPHIC INFO TO MEASURE



NAME OF OUTLET

And other location information like address, zipcode, etc.



TYPE OF OUTLET

Convenience, gas, pharmacy, grocery, etc?



TYPE OF NEIGHBORHOOD

Urban, suburban, rural?



ECONOMIC GROUP

Upper, Middle, Working Class?



SALES TERRITORY

Which territory is the client under?



GENERAL CONDITION OF STORE DURING VISIT

In store traffic, number of on-site employees, etc.

WHAT TO LOOK FOR

You should know as much about the retail outlet as possible so you can cross-reference and find correlations when doing your marketing analysis. These key pieces of demographic data should be associated with every Audit Report that is completed in the field. Ideally, this data exists within your CRM and can be automatically connected to the reports filled in by your rep.

PRODUCT INFO TO MEASURE



PHOTOS OF ON SHELF

Before and after photos of merchandising activities



STOCK LEVEL ON SHELF

Highlight out of stock situations



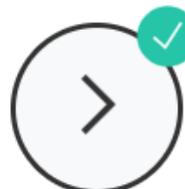
BACKSTOCK LEVEL

What is the stock level in storage?



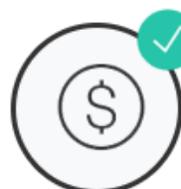
PLANOGRAM COMPLIANCE

Slotting, shelf, and facings?



ADJACENT PRODUCTS

Who are your neighbors?



RETAIL PRICE

How much is the product retailing for?



SHELF TAG PRESENCE

Any shelf tags missing?



LOCATION OF PRODUCT

Which locations can the product be found?



PRODUCT DAMAGE

Record any damages to product



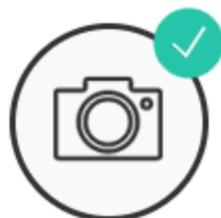
CONSUMER FEEDBACK

Consumer feedback on products

WHAT TO LOOK FOR

Product condition includes everything from stock levels to position on the shelf to planogram compliance and locations in the store. This data can help you identify particular outlets or chains where store personnel need coaching regarding how your product should be displayed, and can aid in identifying correlations between product velocity and positioning.

COMPLIANCE INFO TO MEASURE



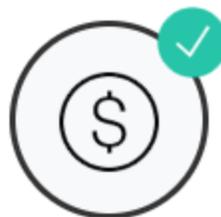
PHOTOS

Document compliance issues with photos



PRODUCT PROMOTIONS

Is the product being promoted?



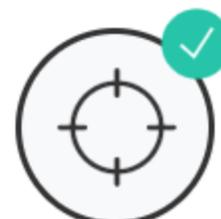
PROMOTED PRICE

What is the promoted price?



PROMOTIONAL MATERIALS

Are agreed promotional materials displayed (posters, shelf talker, stickers?)



PRODUCT LOCATIONS

Are products in agreed locations in the store?



PROMOTION REFERENCES

Is the promotion referenced in the circular?



FULLY STOCKED DISPLAYS

Are displays fully stocked?



FEEDBACK ON PROMO

Any consumer feedback on the promotions

WHAT TO LOOK FOR

CPG companies spend a huge portion of their marketing budget on trade promotion, and the effectiveness of those promotions is directly impacted by how well they are executed in the store. If you are giving retailers a substantial trade allowance, you deserve to have the agreed actions taken and supported in the store. Your merchandising reps should confirm compliance in stores, and rectify any deficiencies that they find. A good Merchandising Software solution will allow you create audit forms that match the in store promotion agreements, and allow you to make those audits available to reps when they visit outlets with an active promotion.

COMPETITIVE INFO TO MEASURE



PHOTOS

Document competitive activity with photos



LIST OF BRANDS

Which competitors are carried in the outlet?



SKUs ON SALE

Which SKUs of the competitor are sold in the outlet?



PRICING

What is the price?



PROMOTIONS

Are the products on promotion?
Type of promotion?



STOCK LEVEL

What is the stock level of competitor items compared to yours?



NEW SKUs

Any new SKUs from competitor?
Details?



FEEDBACK ON COMPETITOR

Any consumer feedback on competitors' items?

WHAT TO LOOK FOR

Having merchandising reps in the field is a great way to see first hand what and how well your competition is executing. The data that you collect about competitors should combine structured data that you can analyze and report on, as well as unstructured data that allows reps to report things that you are not yet aware of.

TEAM EFFICIENCY INFO TO MEASURE



TIME OF ARRIVAL

What time did the rep arrive at the store?



INTERACTION WITH STORE MANAGER

Record any interactions with the store manager



INTERACTION WITH CUSTOMERS

Record any interactions with customers



COMPLETION OF ON SITE FORMS

What forms and activities did the rep complete in store? (Audits, Surveys, etc.)



TIME OF DEPARTURE

What time did the rep leave the store?

WHAT TO LOOK FOR

Running a field team of merchandisers is an expensive proposition, and managing remote workers is by its very nature a difficult task. Being able to coach reps remotely, hold them accountable and make them as efficient as possible is critical to ensuring the success of retail field operations. The Retail Audit itself can be instrumental in all of these areas if it is constructed and executed well.