

Retail Promotional Display Checklist

By Checklister

- ☐ **Prepare the changeover**
Confirm the campaign before moving products.
- ☐ **Record the store and display location**
Identify the actual site and fixture/zone, for example front-window bay or named endcap. Use your real names.
- ☐ **Record the campaign**
Use the approved campaign name/version; resolve contradictory source information before changing the display.
- ☐ **Record the promotion start**
Use the approved start time and record the timezone in run notes.
- ☐ **Record the promotion end**
Use this time when assigning removal/replacement; saving the field does not schedule the work.
- ☐ **Reference the approved campaign brief**
Record the approved source/version or link for SKU/variant list, offer terms, prices, layout and approver.
- ☐ **Review the layout and fixture instructions**
Check the approved display/planogram and the site's fixture/access rules. Identify required materials and any unsuitable fixture before setup.
- ☐ **Confirm products and sign materials are available**
Check the correct SKUs/variants, usable quantities, labels and signs. Obtain an approved decision for shortages or substitutions.
- ☐ **Build the display**
Keep superseded and current material distinct.
- ☐ **Remove the previous promotion**
Remove expired signs and unrelated products through the retailer's process. Preserve reusable assets and route remaining stock to its recorded location.
- ☐ **Prepare the fixture and surrounding area**
Clean and inspect the agreed display area. Report damage or access constraints and use the approved placement instructions.
- ☐ **Arrange the approved products**
Match product groups, positions and facings to the layout. Keep labels visible and products in suitable condition; record any approved deviation.
- ☐ **Install and check promotion signs**
Verify wording, SKU/variant coverage, dates, price and qualifying terms against the approved brief. Remove contradictory material nearby.
- ☐ **Verify and hand over**
Test the finished customer experience.
- ☐ **Starter offer check: compare one promoted SKU price**
STARTER EXAMPLE: Rename to one actual promoted SKU/variant; duplicate for the required product sample or remove if replaced by a complete approved record. Record the SKU, expected approved price/currency, displayed price, POS lookup result and evidence. Compare the same unit/pack in all three places; do not complete a sale.
- ☐ **Starter offer check: test a qualifying basket**
STARTER EXAMPLE: Use only if the campaign has a multi-buy, bundle, member or threshold condition. Rename to the actual offer and approved qualifying case. Record eligible SKUs/quantities, the approved expected total/discount and the permitted POS test result. Use the retailer's approved test route without an unauthorized charge.
- ☐ **Starter offer check: test a non-qualifying case**
STARTER EXAMPLE: Use only where eligibility matters. Choose an approved case such as an excluded variant or a quantity below the offer threshold. Record the actual case and expected/observed POS behavior; confirm the sign communicates the restriction. Remove if no eligibility rule applies.

☐ **Check displayed prices against the POS**

Use the approved lookup/test procedure for the promoted SKUs and qualifying offer cases. Correct or escalate mismatches before releasing the display.

Complete the applicable starter product/offer checks first, or use a complete approved comparison record. Record the reviewed scope and evidence here. A mismatch requires a separate correction and repeat check before display release.

☐ **Inspect the display from the customer approach**

Check that products and offer terms are visible and that no nearby sign contradicts the approved campaign. Correct an obscured or ambiguous message.

☐ **Check displayed stock and condition**

Compare the product positions and usable quantities with the approved layout. Record gaps or damaged products and obtain an approved replenishment or substitution decision.

☐ **Verify customer access around the display**

Check the finished position against the site's approved access and fixture instructions. Report a restriction; do not decide new aisle widths or fixture limits.

☐ **Record the final display image**

Capture the completed display and record when it was taken. Avoid identifiable customers and restricted information; use the retailer's approved evidence location.

☐ **Obtain the display review**

The responsible manager compares the finished display and price-check evidence with the approved brief. Record acceptance, required corrections or an expressly approved exception.

☐ **Record the display reviewer and decision time**

Record the manager/reviewer, actual review time and approved brief/version. Link corrections or expressly accepted exceptions. The decision observation may be complete while separate correction work is still open.

☐ **Assign the end-of-promotion change**

Give removal or replacement of this promotion a native assignee and due date matching the approved end time. Hand over the brief and final image.

☐ **Assign display replenishment follow-up**

Confirm who will check and replenish the display during the campaign. Give remaining stock or display issues an owner and next action.