



DAIRY BOX

OPENING AND CLOSING CHECKLISTS

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Dairy Box opening and closing checklist are set to help the team have an efficient sales

The Power of Opening and Closing Checklists for Retail

by [Delaney Consulting](#) | Apr 6, 2012 | [Operations](#) and [Alexis Damen](#) | 21 Sep 2021

Great customer service and sales begins with efficient store operations. Store employees preoccupied with running the operations of the store will often emphasize store tasks over customer service. Other employees who believe that their only focus is customer interaction can stand idle while their cluttered, dirty store degenerates around them. The most common way to prepare the team for an efficient sales day is to habitually use opening and closing checklists for retail.

Every store needs to use the opening and closing checklist everyday. Then there are the weekly, monthly and quarterly checklists. Monthly tasks contain rotating quarterly tasks. To be effective, checklist usage has to be a non-negotiable. Checklists must be used every day by every manager or employee and checklist use must be verified. It's like counting calories in a diet: it only works if it is done for every single meal.

Structuring opening and closing procedures at your retail store with regular checklists helps keep staff accountable for what needs to be done. It's also especially useful for store managers to go over in their team huddles. This way, no important duties will be left to fall by the wayside.

An Opening Checklist

Should include: turn off the alarm, prepare the cash register, verify internet and systems connections, adjust the thermostat, clean the counters, floormats and door, restock any empty shelf locations, merchandise products to the front of the shelves, Clean and restock restrooms, turn on music, turn on the Open sign. Smile.

See Dairy Box Prescribed Form below.

DAIRY BOX

OPENING AND CLOSING CHECKLIST

Dairy Box Store Opening Checklist

Series Number: _____

Manager/In-Charge: _____

Date: _____

SECURITY

Before entering the store, make sure nothing (from the outside) looks suspicious. Check the store for signs of forced entry. Also check all lighting and surveillance cameras.

STRATEGY

Create your action plan for the day – Tasking, Today’s Timeline, Today’s Store Goals/Target. (e.g. if there are sales or monthly promos)

INVENTORY

Make sure shelves are stocked; count inventory and orders; verify incoming shipping

STORE EQUIPMENT

Make sure POS systems, cash registers, printers, phones, air-conditioning, TVs, and music systems are functioning properly

COMMUNICATIONS

Check work email/websites/pages for customer and corporate updates.

CASH MANAGEMENT

Verify previous night’s deposits, set up registers (count money out of sight).

MARKETING

Set up display or boards with sale or upsell items.

EMPLOYEE MANAGEMENT

Plan daily breaks, set up sales or contest boards to excite your staff, motivate them to reach their sales goals, and make sure everyone has the information they need to do their best.

CUSTOMER PREP

Walk the floor, inspect for cleanliness and stock quality/appearance, set air-conditioning to daytime setting.

OPEN

Unlock the doors, turn on your “OPEN” sign and welcome customers.

Employees should arrive 30 minutes prior to opening to allow enough time to prepare for the start of the day.

Additional Notes (for store-specific tasks)

Checked by:

Closing Procedure

At closing time, one employee will lock the customer entry door(s) from inside. An employee will be stationed at the front door to let any customers remaining in the facility out one at a time.

Employees should take special notice of any customers that seem to be loitering or intentionally trying to be last in line. Anyone who seems to be intentionally loitering should be reported to the manager.

No customers will be admitted after the doors have been locked. Any employees attempting to gain entrance must show proper identification. No vendors or service technicians will be allowed access unless they have been given prior authorization.

After the final customer has left, and the front door has been locked, one employee will conduct an initial walk-through of the area. Special attention will be paid to restrooms, closets, employee lounge, storage rooms and any areas where individuals may be hiding.

One employee will be designated to conduct a final walk-through of the premises before final closing. At this time, the employee will confirm that all cash, negotiable items and valuables have been properly stored and that all safes and cabinets have been locked. The alarm system controlling the safes and vaults will be armed at this time.

Prior to leaving, all lights should be turned off, except for those lights which will allow the lobby to remain visible from the street after hours. Two or more employees will remain in the facility until final closing. Before leaving, one employee shall arm the premise alarm system and verify that the employee exit door is locked from outside.

DAIRY BOX

OPENING AND CLOSING CHECKLIST

Dairy Box Store Closing Checklist

Series Number: _____

Manager/In-Charge: _____

Date: _____

CLOSE THE STORE

Ensure that all customers have left the store lock the doors, turn off/flip the "OPEN" sign

CLEANING

Assign cleaning duties: dusting the shelves, trash collection, window cleaning.

STORE EQUIPMENT

Shut down POS systems, cash registers, printers, phones, air-conditioning, TVs, and music systems.

INVENTORY

Restock merchandise and count inventory.
Check for near expiration and expired products, and products with damage. Report if there are any.

SALES REPORT

Run sales reports, monitor daily sales and other OKR related matters.

STRATEGY

Compare the day's performance with goals:
Sales Targets, Customer Satisfaction etc.

EMPLOYEE MANAGEMENT

Verify time cards/ hours worked

SECURITY

Turn on security lights and cameras(rotate surveillance taps as needed), observe employees to ensure merchandise is not taken, set alarm upon exiting (leave through front doors, in pairs/groups when possible

FINAL WALKTHROUGH

before locking the doors and leaving for the night, do a final walkthrough to make sure all the tasks on your closing checklist have been completed.

Employees should arrive 30 minutes prior to opening to allow enough time to prepare for the start of the day.

Additional Notes (for store-specific tasks)

Checked by:
