

Retail Store – Management and Marketing Checklist

Use This Self-Assessment Guide to Identify Strategies for Increasing Sales and Improving Profitability for Your Store



Over 1,000 tactics and strategies for bringing your store to the next level of growth and profitability

Retail Price: \$97.00
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The

Nitty Gritty, Down N' Dirty, Savvy Strategies®

RETAIL STORE

Self-Assessment Checklist

Over 1,000 tactics & strategies
for bringing your Retail Store
to the next level of growth & profitability

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Retail Store Self - Assessment Checklist

This checklist is designed for use as a self-assessment management tool for conducting an operational evaluation of your store. The evaluation process contained on the following pages is quite thorough, and the end result will be a careful, thoughtful analysis of your store's operations. This self-assessment tool is designed for the serious owner or store manager who truly wants to evolve their business to the next level of growth and profitability. The time invested in conducting this self-assessment will pay large dividends in the form of operational efficiencies and profitability.

In every business, opportunities abound for improvement. Increasing revenue, improving customer relations, and reducing costs are three critical elements for improving long-term profitability. A comprehensive self-assessment process, such as this one, will help keep you focused on your mission and on maintaining your profitability. It is envisioned this checklist can be used in one of five ways:

1. You could utilize this tool to personally conduct a self-assessment of your store.
2. You could assign one of your managers (or a key employee) the task of conducting the assessment as part of an overall employee development process.
3. You could have a Board Member, a Management Advisory Committee Member, or a trusted advisor conduct the assessment.
4. You, or a key employee, could conduct a partial assessment of your store by using one, two, three or more of the major categories in this document to focus specifically on a problem(s) previously identified by yourself, an employee, or a customer.
5. You could utilize an independent consultant to conduct this assessment. However, that would defeat the purpose of a self-assessment program. A "do-it-yourself" process can save you many thousands of dollars in consulting fees. Once you have identified a problem area(s), you may then want to engage an experienced consultant on a short-term basis to help with these specific areas.

While many of the tactics and strategies described herein can be applied toward most any type of store, all of them do not apply in all business or marketing environments. Some are for small stores, some are for large stores, and some of them may apply only in very specific situations. Some tactics and strategies are free, many have minimal cost, and others may require a substantial investment. Some require only an attitudinal change while others may require a change in a process or a procedure. Some strategies may be in conflict with other suggestions depending upon either your competitive environment, or how you have positioned yourself in the marketplace. However, all these topics merit your consideration as you begin to develop a strategy for implementing a "continuous improvement process" for your store.

Helpful Hint: The assessment process is quite thorough and can require a considerable amount of time. However, it is important to emphasize that it is not necessary to complete the assessment in one sitting, in one day, in one week or even in one month. Selecting one, two, three or more of the major categories in this document as a priority on which to focus can be a more practical approach than trying to “do it all” at one time. Also, you may want to consider a methodical process whereby you and/or your management team (or a key employee) conducts the assessment using a different module each week. Remember, this checklist is a reference manual that can be utilized time and time again on an as needed basis on your personal timetable.

Each module has a simple, two-part process. The first part of the assessment process entitled “ASSESSMENT” will rapidly isolate any problem areas and identify opportunities for quickly improving your operations. This process will no doubt generate much discussion among the senior management team. The second part entitled “IMPLEMENTATION” is a management process for prioritizing and managing the implementation of any benefit or strategy as well as identifying the strategies that will make the biggest impact on your profitability.

Conducting the self-assessment process on a quarterly or semi-annual basis will keep you focused on revenue, costs, customer service, and profitability. Sharing the results of this self-assessment process with your employees and assigning them a specific problem to address can be a valuable training exercise and/or employee development tool. If a number of problems have been identified, it will be important to prioritize your actions based upon the highest and best return that can be achieved for the amount of investment you can make at this time. Additionally, comparing the results of previously conducted assessments with current performance will determine the rate of progress you have made in each area. Committing to conducting such an assessment on a regular basis will result in a continual improvement process that in turn will result in a higher level of customer satisfaction and store profitability.

The “Keys” for conducting the self-assessment is as follows:

NA	=	This tactic or strategy is <u>Not Applicable</u> to your business at this time.
Y	=	<u>Yes</u>, this is currently being done at a satisfactory level.
N	=	<u>No</u>, this tactic or strategy is not being used.
NI	=	This area <u>Needs Improvement</u> and a timely strategy must be developed.
Priority	=	On a scale of 1 to 5 with “1” having the highest impact on image, customer service, employee satisfaction, ease of implementation, and profitability. The highest impact items should obviously be addressed immediately.
Responsible Person	=	The <u>Person Responsible</u> for improving or implementing this benefit or strategy.
Due Date	=	<u>Due Date</u> for completion of this strategy.

Like yourself, your competitors are also looking for opportunities where they can find either a marketing or cost advantage. If you don't take pre-emptive action to improve your business on a regular basis, your competition will leave you behind in the marketplace. Revenue, profitability, and customer satisfaction will then suffer. However, implementing one or two minor improvements based on this self-assessment process could possibly result in 10X, 20X or 100X return on both the time and money you have invested in this process. You have made an investment by purchasing this document. Now conduct the assessment! Your customers will be glad you did. And, when the results show on your bottom line, you will be glad you did also.

Comments, Critique, or Recommendations:

Please direct any comments, critique, or recommendations to Jim O'Donnell of Jaguar Management Consulting Group, Inc. at the address on the cover page or via email. Your comments and suggestions are most welcome, will be carefully reviewed, and will be included in the next published edition. Your critique will help improve this self-assessment checklist for the benefit of all stores.

To review other self-assessment checklists for bringing your business to the next level of growth and profitability, visit WWW.Checklists4Business.com

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I. A PROFESSIONAL STORE IMAGE: *(Partial)*



Your store’s image is important for creating a good first impression that will attract the right customers. First impressions begin long before a customer arrives at your storefront. They begin when a customer visits your website, when they engage with your business on Social Media platforms, when they drive by and see the condition of your building and parking areas, and when they call for information. Let’s start the process of creating a positive image for your store.

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	The store's name is unique and helps to identify the type of good(s) and service (s) offered.	<input type="checkbox"/>						
2.	The logo, trademark, and service marks are attractive and distinct.	<input type="checkbox"/>						
3.	The store's primary color selections are attractive, modern, and coordinated.	<input type="checkbox"/>						
4.	Theme, motto, or tag lines enhance the store name and logo.	<input type="checkbox"/>						
5.		<input type="checkbox"/>						
6.		<input type="checkbox"/>						
7.		<input type="checkbox"/>						
8.		<input type="checkbox"/>						
9.		<input type="checkbox"/>						
10.		<input type="checkbox"/>						
25.	Purchase order forms contain complete up-to-date store contact information and support the store’s image.	<input type="checkbox"/>						



A Wise Old Owl Once Said . . .
 “You never get a second chance to make a good first impression.”
 ~ Will Rogers

XI. EMPLOYEE MARKETING and SALES ATTITUDES: *(Partial)*



People like to do business with friendly and genuine people. An attentive, properly attired, product knowledgeable, responsive, well-trained, professional staff enhances the customer's shopping experience. Using the strategies in this section will take ordinary service to extraordinary?

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	The attitude of the owner or manager sets the standard – are you setting a good example?							
2.	A friendly greeting is always provided along with a friendly smile.							
3.	Eye contact is made with each customer.							
4.	Undivided attention is given to each transaction.							
5.	"Hello" and "Good-bye" is said cheerfully.							
6.	A sincere "THANK YOU" is said after each customer purchase.							
7.	"Have a nice day" as well as other disingenuous phrases are eliminated.							
8.								
9.								
10.								
11.								
12.								
13.								
14.								
35.								
47.	Salesclerks understand their paychecks come from satisfied customers who return frequently to the store.							

XII. MERCHANDISING TECHNIQUES: *(Partial)*



Bringing customers into your store can be a difficult task, especially when competing against online shopping options. Once inside, effective merchandising techniques encourage them to make a purchase. If customers enjoy the way they feel in your store, the salesclerks are friendly and helpful, and the store is easy to navigate, they will be more inclined to spend money.

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	The store's dominant wall, aisle, or area has the best fixtures, best merchandise, and highest margins.							
13.	Sale items and advertised specials are located near back of store for maximum exposure of all other products on display.							
26.	Outdated or damaged goods are quickly removed from the selling floor or offered at a substantially reduced price.							
n.								
35.	Place displays with a variety of colorful items in the Point-of-purchase area making it easy for customers to make impulse buys.							
38.	A merchandising plan that fulfills the objectives of the marketing plan has been developed and implemented.							
42.	High margin items or "specials" are displayed at aisle ends for maximum exposure.							
50.	Window displays are well lighted with the spotlight focused on a dominant prop.							
57.	Use lighting to create a pleasant shopping experience (shoppers will not spend any time in a store with dim lighting).							

XVII. "YOU ARE THE BRAND" MARKETING TECHNIQUES: *(Partial)*



You are your business is a marketing strategy that sells you first and sells your store indirectly. Creating a personal brand influences how potential customers think about you and your store. This strategy may not work for everyone, but if you have an outgoing and engaging personality, this strategy could help supplement your stores current marketing programs. Techniques for you to consider when implementing this strategy are:

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	You become actively involved in community events and take a leadership role.							
7.	You appear on local talk shows to discuss business trends.							
9.	You write a book and gain publicity from it.							
10.	You write articles for a magazine or newspaper about the retail industry, owning a small retail store, etc.							
13.	You teach courses/give lectures about managing a store, the retail industry, or owning a small business.							
17.	You establish relationships with the press and become a quotable source.							
18.	You actively sponsor Little League teams, softball teams, chamber events, robotic competitions, or similar events and personally attend these games or events.							
20.	You create your own special holiday, promote it, and host a themed dinner event at a local restaurant.							
21.								
22.								
23.	You personally appear in your store's TV advertising.							
26.								

XX. HOW TO COMPETE WITH THE GIANTS: *(Partial)*



Sometimes, to beat the competition you must do just the opposite. The chains may have a bigger marketing budget and a regional or national footprint, but that doesn't mean you can't outmaneuver them. Your ability to be flexible rather than being compliant with the corporate rigidity of the chains, will be the difference in your success. It may take you a while to find the secret recipe that makes your store stand out from the crowd, but you can start implementing the strategies below to see which one(s) work best for your store.

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
1.	Potential weaknesses in a Giant's execution, quality, variety, convenience, and pricing has been evaluated and a strategy developed to exploit these weaknesses.							
2.	You have visited a giant(s) facility to see how they are managing their operation and have reviewed their offerings.							
3.	You have subscribed to a giant(s) newsletter to see how they are promoting their brand and products items.							
4.	An internal assessment of your store's strengths and weaknesses has been conducted regarding execution, quality, variety, and convenience to the customer and a strategy developed to exploit these strengths and correct the weaknesses.							
13.	Products and items that compete directly with the giant's items have been jettisoned (unless they are higher quality or are needed to offer a full complement of shopping options).							
21.	A reputation has been developed for an intangible, such as service, quality, convenience, delivery, longer hours, unique experience, etc.							
35.	Personal attention is provided rather than a "cookie cutter" approach that the giant's offer.							
69.	Social Media platforms are used to show the ambience and offerings in a fun and pleasant way.							

XXI. INTERNET MARKETING STRATEGIES: *(Partial)*



Websites, e-commerce, and Social Media are imperative marketing strategies as more customers now rely upon the Internet to look for new and better shopping options. This section of the checklist provides numerous guidelines for reviewing your stores website functionality, design, search engine marketing strategies, online advertising ROI, and your Social Media activities. Time dedicated to building an online presence for your store that is a positive experience for your customers is time well spent.

No.	Strategies and tactics to be evaluated:	ASSESSMENT				IMPLEMENTATION		
		NA	Y	N	NI	P	RP	DD
A.	Get Your Website Launched							
1.	The primary goal for marketing on-line has been established.							
7.	The website's identity is consistent with your store's brand.							
11.	Your website uses "Adaptive" technology to ensure compliance with all search engines, display monitors and mobile devices.							
12.	A master document is maintained with all login info for the website, hosting account, domain registrar, analytics and webmaster's tools, Social Media accounts, online directories, and other digital properties.							
17.	One image is used for approx. every 300 - 400 words of text.							
18.	Your webmaster has added "Alt Tags" that are Keyword rich to your graphic images.							
20.	Each primary web page has approx. 1,000 words of text.							
28.	All the links on the website have been checked and verified to ensure they all work if a customer should click on them.							
41.	Your website has been reviewed for all the latest Search Engine Marketing techniques. Contact WWW.Crevand.com for help with these strategies.							
43.	The website has been submitted to all the major search engine directories.							
45.	Your webmaster has created a Google Site Map™ for your website.							

XXI. Internet Marketing Strategies Continued . . .	NA	Y	N	NI	P	RP	DD
54. The Meta Description should have a minimum of 140 characters and a maximum of 240 characters.							
57. The order of your Keywords is important. "Hilton Paris" returns very different results in the search engines than does "Paris Hilton".							
58. An interesting and informative blog has been initiated to communicate with your customers.							
77. How visitor info is collected and used is clearly defined and ensures compliance with the Children's Online Privacy Protection Act (COPPA),							
80. A merchant account has been selected to facilitate online product sales.							
81. A "Shopping Cart" has been installed for accepting product sales.							
112 An ethical bribe is being used to encourage opt-ins such as a coupon, e-book, free video, mini-course, white paper, research report, free report, etc. to entice visitors to opt in.							
117 Split Tests have been conducted to determine which headline is best for the Opt-in Page.							
132 An "Events Page" has been added to inform customers about special events taking place at your store or in the community.							
137 Online advertising on retail industry or market focused websites and/or directories is utilized to supplement current advertising.							
138 Pay-Per-Click advertising is used to generate traffic to the website (Google Adwords™, Bing™, Facebook™ (Meta™), or LinkedIn™, for example).							
149 A fully optimized profile has been created on Google Business Profile™.							
173							

XXVI. Sample Net Income Statements.

Sample Net Income statements of three (3) small stores appear in this section for the purpose of being used as a basis for comparing your store's income and expenses. Although each model presents a different set of operational circumstances, they might be helpful with providing some insight into your store's current cost structure. They are to be used for informational purposes only and not as a model for you to replicate with your store. Every business and each store owner's financial needs are uniquely different.

(Only one shown)

CHILDREN'S TOY & CLOTHING STORE
12 Months ending December 31

	12 Months	% Of Sales
REVENUE:		
Sales	\$1,081,850	100%
Sales Returns	0	0%
Total Revenue:	\$1,081,850	100%
COST OF SALES:		
Purchases	616,466	56.98%
Total Cost of Sales:	\$616,466	56.98%
GROSS PROFIT:	\$465,384	43.02%
OPERATING EXPENSES:		
Advertising & Promotion	7,476	0.69%
Auto & Travel	4,246	0.39%
Bank Fees	11,881	1.10%
Casual Labor	4,775	0.44%
Depreciation	7,980	0.74%
Dues & Subscription	1,739	0.16%
General Supplies	15,713	1.45%
Insurance – Health	16,368	1.51%
Insurance – Liability	6,460	0.60%
Interest	6,483	0.60%
Misc. Expenses	3,716	0.34%
Office Supplies	2,086	0.19%
Payroll Services	840	0.08%
Professional Fees	2,619	0.24%
Rent – Downtown	48,000	4.44%
Rent – Mall	58,126	5.37%
Repairs	1,010	0.09%
Salaries and Wages	166,306	15.37%
Taxes – Payroll	16,051	1.49%
Taxes – Real Estate	11,774	1.09%
Taxes – State of NH	547	0.05%
Telephone	3,045	0.28%
Utilities	10,135	0.94%
Total Operating Expense:	\$400,893	37.66%
NET INCOME:	\$58,088	5.36%

This is a two-store operation with one store in a downtown location in a city with an approximate population of 25,000 in Southern New Hampshire. The other store has been operating for 3 years and is located nearby in a mall. It is a 22-year-old second generation family business, and the current manager has been operating it for the past 11 years as a sole proprietorship. They have 16 employees on the payroll that are shared between the two stores. Seasonal help is employed during peak periods. The family owns the building in the downtown location and rent is paid to the family trust. The owner's salary of \$57,000 is included in payroll expense and both health insurance and retirement are store paid. Purchases are shared between the two stores to enable quantity discounts and easy transfer of merchandise between the stores. Their pricing strategy is a combination of Suggested Retail Price, "Keystone" pricing, and competitive analysis. Their key strengths are a unique product line, friendly atmosphere, 22 years of community service, and an appeal to all economic levels.

XXVII. Retail Store Horror Stories. *(Partial List)*

Most people, at one time or another, have had an unpleasant shopping experience at a retail store. They may have been badly treated by salesclerks and store managers or they may have had difficulty with store policies, inferior products, or poor customer service. When something like this happens, the customer may never complain, but they will silently resolve never to patronize that store again.

Described below and on the next several pages are a number of "Horror Stories". These events have happened and reflect the failings of many retail stores. They happen in many stores and in many towns and cities all over the world. Fortunately, there are lessons that can be learned through the mistakes of others. Read them carefully and learn the lessons that are contained therein.

How sweet it is! One day I bought a candy bar at a gas/convenience chain store. As part of a national contest, the inside wrapper showed I had won a free candy bar. I tried to collect my free candy bar from the same store, and they refused to honor the coupon. The store claimed they were not participating in this contest. The candy bar clearly showed the advertisement for the contest, and they took my money for the purchase of the candy bar. My assertion was they participated in this contest when they offered the candy bar for sale and when they took my money. A brief argument followed, and they still refused to honor the rules of the contest. The store does get reimbursed for both the retail cost of the candy bar and the postage. Before this incident, I regularly purchased milk, gas, candy, newspapers, and coffee from them. Now I no longer patronize this store. They lost far more money than the cost of the candy bar.

Lesson: If you don't want to participate in a contest, then don't offer the product for sale. Don't argue with a regular customer who spends hundreds of dollars with your business annually over a \$0.60 candy bar.

T.S., Greenland, NH

Show me how much you really care about me! I was standing in the checkout line of a store that is a national office supplies chain. The clerk asked the person in front of me "Did you find everything you needed?" The customer responded that he couldn't find "item X". The clerk ignored him and continued to ring up the purchases. The customer just shook his head in disbelief and smiled at me as well as the person in line behind me. When it was my turn, the clerk again asked, "Did you find everything you needed?" I said I couldn't find the same "item X" and just as before the clerk ignored me and continued to ring up my purchases. I smiled to the person behind me. When it was this person's turn, he also asked for "item X" and was once again ignored.

Lesson: Teach your clerks to capitalize on potential sales opportunities. Teach your clerks to acknowledge customers. Teach your clerks not to use disingenuous phrases like a robot. All this does is upset the customer and communicates that you really don't care about their needs.

R.W., Portsmouth, NH

Round N' Round we go! I tried to find a parking space to patronize a small downtown convenience store in a city where it is difficult to find parking. After circling the block several times, I finally found a parking spot some distance away from the store. As I approached the store, a young man exited the store, put money in a parking meter that

was directly in front of the store's entrance, and then went back into the store. When I entered this store, the young man was the clerk behind the counter.

Lesson: Have your employee's park in a parking lot away from the store rather than utilize prime parking spaces. Make it easy for your customers to find parking so they can conduct business with you.

L.R., Portsmouth, NH

I am sure glad you invested your money in a Customer Service Area just for me!

I was trying to purchase \$500 worth of custom printing at a national office supplies store, and I was the third person in line. The two people in front of me were there to return faulty products that had nothing to do with copying or printing. I had to wait an unnecessarily long time to conduct a purchase as well as listen to two people complaining while they were exchanging items and receiving a credit. I noticed the Customer Service Area was not staffed and customers with problems were sent to the copy center.

Lesson: If you have a customer service area, then staff it. Don't pretend to be service oriented and not provide a service representative to handle customer problems. I don't want to waste my time standing in line to purchase \$500 worth of product and listen to customer complaints.

S.J., Manchester, NH

Don't call me, I'll call you! I placed a fairly large special order with a national office supplies store that was time critical. Since the order was to be completed in approximately two weeks, they promised to call me as soon as my order was finished. Nearly three weeks later they had not called even though the order had arrived early. Additionally, I tried to call them, and their phone number was not on the store receipt. When I picked up the order there was no apology, and they blamed another clerk.

Lesson: You all work for the same store and it is everyone's responsibility. No phone number on a receipt sends the message that you really don't want customers to call you. Keep your promises and make it easy for me to both buy from you and communicate with you.

S.J., Manchester, NH

You mean I should get a parking ticket! I was shopping in a small, downtown boutique type store just as the stores were opening for the day. A man parked directly in front of this store and checked his pockets for quarters for the parking meter. Since he did not have any quarters for the meter, he came into the store and asked for change. The storeowner refused to supply change and the man drove off angrily. I asked the storeowner why she didn't provide change and she said it was a store policy. She indicated she didn't want to bother going to the bank for change, he wasn't going to buy anything, he was taking up a space for one of her potential customers, etc. This attitude is from a storeowner in a small city that is trying to establish itself as a "destination" city.

Lesson: If you want to be a destination city, then you need to be friendly and accommodating to visitors. One of your customers may have to park in front of another store and may also require change for the parking meter. If that storeowner didn't provide change, then you would probably lose that customer. Stores in "destination" cities should learn to cooperate with each other.

D.A., Portsmouth, NH

Many more to follow ...

XXX. Other Business Checklists - - Descriptions

Retail Store Management and Marketing Checklist: Retail storeowners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their store's profitability. This unique management tool features over 1,000 tactics, strategies, and action items for evaluating twenty-five different operational categories ranging from store image to customer service to marketing. The Checklist includes a simple process for helping you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your retail store to the next level of growth and profitability by using this management Checklist today. To see how your store can benefit from this Checklist, visit [Retail Store Management and Marketing Checklist](#)

Restaurant Management and Marketing Checklist: Restaurant owners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their restaurant's profitability. This unique management tool features over 1,425 tactics, strategies, and action items for evaluating thirty-two different operational categories ranging from restaurant image to customer service to marketing. The Checklist includes a simple process to help you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your restaurant to the next level of growth and profitability by using this management Checklist today. To see how your restaurant can benefit from this Checklist, visit [Restaurant Management and Marketing Checklist](#)

Employee Benefits (Employee Motivation) Checklist: Motivating employees and keeping them motivated is one of the most difficult, and most rewarding, activities of a senior manager. Even in the most difficult of economic times, we know employees have choices regarding the company, and the culture, in which they prefer to work. This checklist is designed to be a self-assessment management tool for conducting an evaluation of your company's employee benefits and motivational strategies. Offering over 500 ideas, this guide is designed for the serious management team that truly wants to evolve their business to the next level of growth and profitability via the strategy of employee satisfaction. To see some ideas for what your company could do to improve employee satisfaction, visit [Employee Benefits \(Employee Motivation\) Checklist](#)

Business Anniversary and Celebrations Checklist: This checklist has over 400 ideas to help your business enjoy its important milestones and celebrate its employees and customers. This Checklist features many interesting marketing and fun activities for restaurants, retail stores, child themed stores and numerous ideas for all types of businesses. This is a great way to build employee morale and connect with your customers - - show them how much you appreciate them. Have fun at your celebration with some of the ideas featured in the [Business Anniversary and Celebrations Checklist](#)

Personal Readiness To Start A Business Checklist: Am I prepared to be a business owner is the most important question that must be asked? With over 300 insightful

questions and action steps, this checklist will help you answer that question. The Checklist is a self-assessment tool that is designed to help you prepare for starting a business. Its primary focus is on determining if you are truly ready to start a business by examining a range of topics that include family considerations, financial resources, personal and professional support systems as well as many other vital subjects. Each module has a simple process that allows you to take an inventory of all the factors and actions necessary for success. This can be done quickly and easily and will rapidly identify areas that will require you to seek additional information or to conduct more research. Beside each question or action item is a space for making notes that will help facilitate the evaluation process and serve as a reminder to follow up on certain items. This is a simple personal management process to help keep you focused. The checklist is based on the author's experience with hundreds of small businesses. To get started now, visit [Personal Readiness To Start A Business Checklist](#)

If, after taking this assessment you believe you are truly ready to start a business, then consider the **Start a Business Checklist – Implementation** described below.

Start A Business Checklist - Implementation: Am I prepared to be a business owner is the most important question that must be asked? The "Implementation" Start A Business Checklist is much more extensive than the "Personal Readiness" Checklist. This Checklist will help you minimize mistakes and prepare you for a successful launch of your business. The same 300+ questions and action items are asked but included is a comprehensive format and process to help you manage priorities, due dates, and the resources required to launch your business. Additionally, there are Summary Charts and Tables showing the various Business Entity Types, a discussion of The 13 Worst Business Start-Up Mistakes, and a chart for Viable Alternatives to Starting a New Business. Also included is the complete Business Planning Guide (described below) that will guide you through the process of writing your business plan. If you purchase this Checklist, then **DO NOT** buy the *"How To Write A Business Plan Guide"* as it is included. The Start A Business Checklist is based on the author's experience with hundreds of small businesses. If you are serious about launching your business, this is the checklist for

The **How To Write A Business Plan Guide** is designed to provide a process for creating several variations of a business plan with each variation used for a specific purpose and for a specific audience. This guide features a One Page Executive Summary Format, a Simplified Model for a Business Plan, guidance for Creating a Comprehensive Business Plan, instructions for How to Use the Business Plan Guide, a discussion of The Business Plan creation Process, helpful Tips for Writing the Business Plan, a sample Business Plan Outline, a Business Plan Outline Description, 2 sample Cash Flow Statements that are downloadable for your business plan, 22 Market Research Sources, and 27 possible Funding Options. A comprehensive business plan that is well-written, based upon market research, and is supported by a conservative and thoughtful Cash Flow Statement will provide a structure for helping to make your business successful. This guide is based on the author's experience with hundreds of small businesses. To get started with writing your business plan, visit the [How To Write A Business Plan Guide](#)

Business Plan Review: Would you benefit from having an experienced businessperson review your business plan before you present the plan to potential investors or bank loan officers? Once your business plan has been written, I will spend up to two hours reviewing your business plan or loan proposal for completeness, viability, and to see if it "makes good business sense". In other words, let's catch any mistakes now! This review does not include rewriting any part of the plan, conducting market research, modifying

the Cash Flow Statement, or commenting on any legalities, but I will review the assumptions, the numbers, the marketing plan, and the overall presentation as well as provide feedback on my general impressions. I'll give constructive feedback with some brief written comments, ask some questions of clarification, and provide helpful suggestions for improving your Business Plan. Take advantage of this value-priced service by visiting [Business Plan Review](#)

Business Documents Review: Would your business benefit from having an experienced businessperson review your strategic plan, marketing plan, Search Engine Optimization strategy, Search Engine Marketing plan, business plan, expansion and growth strategy, Cash Flow Statement, or any other business initiative? Do your plans need validation or tweaking?, Do you need help identifying areas of improvement or selecting a better option? Are you currently getting the results you want? If not, perhaps having an experienced set of eyes "take a closer look" will provide a new perspective. Our Business Documents Review Services are tailored to fit your needs and budget. For more info visit [Business Documents Review](#)

Custom Checklists and Guides: If you like the content, organization, and format of my checklists, then I can customize an existing checklist (or create a completely new Checklist) for your business or industry. For more info visit [Business Documents Review](#)

Checklist for Choosing an Assisted Living Facility for Yourself or a Loved One: This Checklist features over 650 items to be considered when making this critical family decision. If you have a family member, friend, relative, neighbor, or business associate considering an Assisted Living Facility lifestyle, or a senior living home, for themselves or a family member, this checklist will make the decision-making process much easier. This checklist is based on our family's personal experience with selecting an ALF for my Mother-in-law, handling several of her medical emergencies at the ALF, and working through several ALF organizational changes. Select the "right" Assisted living Facility for your loved one by visiting [Checklist for Selecting an Assisted Living Facility](#)