**The Category Champion Toolkit: Store Organization Mastery Starter Pack**

**Practical tools for smarter store organization—use today!**

**1. Store Organization Assessment**

**Is Your Store Driving Customers Crazy? Check each that applies:**

* ☐ Customers ask for product locations at least once per shift
* ☐ Similar products are scattered across the store
* ☐ Frequently shopped items are hard to find
* ☐ Displays block main pathways or cause bottlenecks
* ☐ Promotional items do not have clear signage
* ☐ Seasonal items don’t rotate on time
* ☐ Employees need to check stockroom for basic items
* ☐ Customers double back or circle aisles
* ☐ Endcaps are cluttered or underused
* ☐ Checkout area is congested

**Total Checks:** \_\_\_\_/10

**Priority List:** List the top 3 issues to fix first:

**2. Customer Observation Tracker**

| **Date** | **Time** | **Customer Issue Observed** | **Action Taken** |
| --- | --- | --- | --- |
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*Use this log for one week—then review where to improve.*

**3. Category Logic Decision Tree**

| **Question** | **Yes / No** |
| --- | --- |
| Would a new shopper find this product without asking? |  |
| Is this item placed with similar or complementary products? |  |
| Is the location visible from a main aisle? |  |
| Does signage clearly indicate category or promotion? |  |
| Would you buy this item here if you were a customer? |  |

*If you answer "No" to any, review your category logic!*

**4. Cross-Merchandising Opportunity Finder**

| **Primary Product** | **Paired Product** | **Location/Display** | **Sales Impact (Y/N)** |
| --- | --- | --- | --- |
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*Identify and test pairs—record what boosts sales!*

**5. Seasonal Category Adjustment Template**

|  |  |  |
| --- | --- | --- |
| Month/Season | Display/Category Change Needed | Date Completed |
| January/Winter |  |  |
| April/Spring |  |  |
| July/Summer |  |  |
| October/Fall |  |  |
| December/Holidays |  |  |

**6. Employee Efficiency Checklist**

* ☐ Main aisles clear of clutter
* ☐ All signage up-to-date and accurate
* ☐ Popular products always in-stock and front-facing
* ☐ Endcaps refreshed daily
* ☐ Cold cases organized and wiped down
* ☐ Checkout area clean and stocked
* ☐ Backroom organized for fast restocking
* ☐ Trash/recycling emptied
* ☐ Seasonal displays checked and rotated
* ☐ Quick daily walkthrough for stray items

**7. Manager Presentation Template**

Fill in the blanks to propose an organizational improvement:

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Subject: Store Organization Improvement Proposal

Current Issue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposed Change: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Expected Benefits: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Implementation Plan: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_