

SITE SURVEY REPORT

Visual Merchandising and Planogram Audit

Prepared for	Greenvale Health Stores Ltd
Date	9 Oct 2026
Site	Store 37, Brindley Street, Arnworth
Prepared by	M. Achterberg

FORM

Visual Merchandising and Planogram Audit

1. Store and planogram set

Project	Store 37, Brindley Street, Arnworth: planogram and VM audit (completed example)
Store address	37 Brindley Street, Arnworth AW2 5JH
Retailer or brand	Greenvale Health Stores Ltd
Location (GPS)	53.6012, -2.2987
Audit date	9 Oct 2026
Auditor	M. Achterberg
Store name or number	Store 37, Arnworth
Store manager or department lead	C. Dunmore
Reason for the audit	Campaign change
Planogram set or season in force	Autumn 2026, version 3
Campaign or promotion in store	Autumn wellness, VM guide week 41
Campaign end date	1 Nov 2026

The standard is the retailer's own planogram and visual merchandising guide. Audit each bay or area against the planogram version that should be on display, and photograph the bay before and after any fix.

2. Windows, entrance and promotional ends

Window display matches the campaign guide	Acceptable
Window glass, floor and props clean, window lights working	Acceptable
Entrance and front-of-store display set to the guide	Acceptable
Promotional ends match the campaign plan	Acceptable
Promotional signage shows the right mechanic and dates	Action needed
What needs doing, or why not checked	End 9 still has the 'summer skin' 3 for 2 header, offer ended 30 September. Removed during the visit.

Aisles clear of stock, cages and empty cartons	Acceptable
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Displays and stock not blocking fire exits or escape routes	Acceptable
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Acceptable	6
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Needing action	1
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Not checked	0
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3. Bays and areas

Bays and areas audited 1: Wall bay W2: vitamins and supplements

Bay or area	Wall bay W2: vitamins and supplements
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Type	Wall bay
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Planogram reference and version	VS-W2, Autumn 2026 v3
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Bay width (mm)	1000
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Before photos



Planogram version on display matches the one in force	Acceptable
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Facings as the planogram shows	Acceptable
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No gaps or out-of-stock spaces	Acceptable
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Every product in its planogram location	Acceptable
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Shelf-edge labels present, correct and next to the product	Acceptable
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Point-of-sale material current and in the right holders	Acceptable
Promotional end or feature set as planned	Not applicable
Bay lighting working	Acceptable
Bay, shelves and product clean and dust free	Acceptable
Fixtures, shelves and fittings undamaged	Action needed
What needs doing, or why not checked	Shelf 4 has dropped at the left bracket and slopes forward. Kickplate along the base is peeling and the plinth is chipped.
Product fronted and faced up	Acceptable
Gap lines recorded	0
Checks acceptable	9
Checks needing action	1
Not checked	0
Area compliance (%)	90
Fixed during the visit?	Partly

Bays and areas audited 2: End 6A: autumn wellness promotion

Bay or area	End 6A: autumn wellness promotion
Type	Promotional end
Planogram reference and version	PE-6A, Autumn wellness week 41
Bay width (mm)	1250

Before photos



Planogram version on display matches the one in force	Acceptable
Facings as the planogram shows	Acceptable
No gaps or out-of-stock spaces	Acceptable
Every product in its planogram location	Acceptable
Shelf-edge labels present, correct and next to the product	Acceptable
Point-of-sale material current and in the right holders	Acceptable
Promotional end or feature set as planned	Acceptable
Bay lighting working	Acceptable
Bay, shelves and product clean and dust free	Acceptable
Fixtures, shelves and fittings undamaged	Acceptable
Product fronted and faced up	Acceptable
Gap lines recorded	0
Checks acceptable	11
Checks needing action	0
Not checked	0
Area compliance (%)	100

Bays and areas audited 3: End 3B: boxed herbal teas

Bay or area	End 3B: boxed herbal teas
Type	Promotional end
Planogram reference and version	PE-3B, Autumn 2026 v3
Bay width (mm)	900

Before photos

Planogram version on display matches the one in force	Acceptable
Facings as the planogram shows	Action needed
What needs doing, or why not checked	Top two shelves have 3 facings per line, planogram shows 4. Lines spread to fill the space.
No gaps or out-of-stock spaces	Action needed
What needs doing, or why not checked	Two gaps on shelf 3. One line delisted with its label still on the shelf.
Every product in its planogram location	Acceptable
Shelf-edge labels present, correct and next to the product	Action needed
What needs doing, or why not checked	Label for the delisted chamomile blend still on shelf 3.
Point-of-sale material current and in the right holders	Action needed
What needs doing, or why not checked	No header card fitted. Campaign pack header for 3B not found in the stockroom.
Promotional end or feature set as planned	Acceptable

Bay lighting working	Acceptable
Bay, shelves and product clean and dust free	Acceptable
Fixtures, shelves and fittings undamaged	Action needed
What needs doing, or why not checked	Base kickplate scuffed and dirty along the front.
Product fronted and faced up	Acceptable

Out-of-stock and gap lines 1: Greenvale chamomile and lavender, 20 bags

Product	Greenvale chamomile and lavender, 20 bags
Shelf and position	Shelf 3, facings 2 to 3
Reason for the gap	Delisted, label left on
Gap width (mm)	160
Facings missing	2

Out-of-stock and gap lines 2: Greenvale lemon balm, 20 bags

Product	Greenvale lemon balm, 20 bags
Shelf and position	Shelf 3, facing 6
Reason for the gap	No stock in store
Gap width (mm)	80
Facings missing	1
Gap lines recorded	2
Checks acceptable	6
Checks needing action	5
Not checked	0
Area compliance (%)	55
Fixed during the visit?	No

4. Compliance result

Areas audited	3
Areas below 90%	1
Gap lines recorded	2

Checks acceptable	32
Checks needing action	7
Not checked	0
Overall compliance (%)	82
Rating	Needs improvement

Compliance is our own measure: checks marked acceptable as a share of checks marked acceptable or action needed, per area and overall. Rating bands: 90% and over Good, 75 to 89% Needs improvement, under 75% Poor. These are not an industry standard; use your own if the retailer sets them.

5. Actions and sign-off

Items needing action	7
Result	Action needed before the next visit

Actions 1: Reset end 3B to planogram PE-3B: four facings per line on the top two shelves, remove the delisted chamomile label, fill the lemon balm gap when stock arrives.

Action	Reset end 3B to planogram PE-3B: four facings per line on the top two shelves, remove the delisted chamomile label, fill the lemon balm gap when stock arrives.
Priority	This week
Who will do it	C. Dunmore
Due by	14 Oct 2026
Status	Open

Actions 2: Order the missing header card for end 3B from the campaign team.

Action	Order the missing header card for end 3B from the campaign team.
Priority	Before the store opens
Who will do it	C. Dunmore
Due by	10 Oct 2026
Status	In progress

Actions 3: Maintenance to re-fix the shelf 4 bracket and replace the kickplate on wall bay W2.

Action	Maintenance to re-fix the shelf 4 bracket and replace the kickplate on wall bay W2.
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Priority	Next visit
Who will do it	Estates helpdesk
Due by	23 Oct 2026
Status	Open
Actions still open	3
Decision	Fix the listed bays, check at the next visit
Follow-up visit date	23 Oct 2026
Summary for the store manager	Window and front of store set to the week 41 guide. End 6A fully to plan. End 3B is off planogram: reduced facings, a delisted line still labelled, no header card. Wall bay W2 needs a shelf bracket and kickplate repair. One expired header removed from end 9.
Auditor name	M. Achterberg
Auditor signature	

M. Achterberg

Store manager name	C. Dunmore
Store manager signature	

C. Dunmore