ChecklistGuro

Returns Processing Efficiency Audit Checklist

Returns Initiation & Customer Communication

Focuses on the initial steps of the return process from customer request to acknowledgement and initial instructions.

Average Time to Acknowledge Return Request (Minutes)

Enter a number...

Return Request Method(s) Offered to Customers

- [ ] Online Return Portal
- [ ] Email
- [ ] Phone
- [ ] Live Chat

Standardized Return Instructions Provided to Customers?

Write something...

Customer Communication Channel for Updates

- [ ] Email
- [ ] SMS
- [ ] Phone Call
- [ ] Portal Notifications

Percentage of Returns Acknowledged Within 24 Hours

Enter a number...

Describe Current Customer Communication Process for Returns Initiation.

Write something...

Is Return Shipping Label Provided to Customer?

- [ ] Yes
- [ ] No

Returns Authorization & Documentation

Examines the authorization process, necessary paperwork, and any required customer documentation.

Return Authorization Method

- [ ] Online Portal
- [ ] Email
- [ ] Phone Call
- [ ] Other

Average Authorization Processing Time (minutes)

Enter a number...

Description of Authorization Workflow

Write something...

Is a Return Merchandise Authorization (RMA) number generated?

- [ ] Yes
- [ ] No

Sample of standard Return Authorization form/document

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Does the authorization process include verification of purchase history?

- [ ] Yes
- [ ] No

Percentage of returns authorized automatically (no manual intervention)

Enter a number...

Describe any exceptions to the standard authorization process.

Write something...

Returns Receiving & Inspection

Covers the physical receipt of the returned goods, inspection for damage, completeness, and reason for return validation.

Average Time to Receive Returned Goods (hours)

Enter a number...

Percentage of Returns Received Without a Return Authorization (RA) Number

Enter a number...

Method for Identifying Return Reason

- [ ] Customer Selection on Portal
- [ ] Inspection Team Assessment
- [ ] Return Manifest Notes
- [ ] Other - Specify in LONG_TEXT

Details of discrepancies between customer-stated reason for return and inspection findings. (If applicable)

Write something...

Percentage of Returns Rejected at Receiving (e.g., unauthorized returns, incorrect items)

Enter a number...

Condition of Returned Goods Upon Receipt (Typical)

- [ ] As New
- [ ] Slightly Used
- [ ] Used/Visible Wear
- [ ] Damaged
- [ ] Other - Specify in LONG_TEXT

Example Photo of Damaged Returned Goods (if applicable)

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Number of Returns Damaged During Receiving/Handling (Estimated)

Enter a number...

Describe any observations regarding packaging condition upon receipt.

Write something...

Returns Disposition & Processing

Evaluates the various disposition options (refund, replacement, repair, restocking) and the efficiency of their respective processes.

Average Time to Process a Refund (days)

Enter a number...

Percentage of Returns Processed Within SLA (%), Refund type

Enter a number...

Default Disposition Route (e.g., Refund, Replacement, Restock)

- [ ] Refund
- [ ] Replacement
- [ ] Restock
- [ ] Repair
- [ ] Other

Reasons for Deviations from Default Disposition Route

- [ ] Product Defect
- [ ] Incorrect Order
- [ ] Customer Preference
- [ ] Shipping Damage
- [ ] Other

Describe any common bottlenecks in the Disposition process

Write something...

Method used for product restocking after return

- [ ] Immediate Restock
- [ ] Quarantine for Inspection
- [ ] Restock after Repair/Refurbishment
- [ ] Other

Percentage of returns that require manual intervention for disposition

Enter a number...

Date of last review of Disposition process workflow

Enter date...

Returns Data & Reporting

Assesses the data collected throughout the returns process and the usefulness of reports generated for analysis and improvement.

Average Time to Process a Return (Days)

Enter a number...

Return Processing Volume (Units/Month)

Enter a number...

Returns Data Integration with ERP/WMS

- [ ] Fully Integrated
- [ ] Partially Integrated
- [ ] Not Integrated

Data Points Tracked for Returns Analysis

- [ ] Reason for Return
- [ ] Product Category
- [ ] Shipping Origin
- [ ] Customer Segment
- [ ] Return Processing Time
- [ ] Return Shipping Cost

Summary of Key Findings from Returns Data Analysis (Last Quarter)

Write something...

Date of Last Returns Data Performance Review

Enter date...

Reporting Frequency (Returns Data)

- [ ] Daily
- [ ] Weekly
- [ ] Monthly
- [ ] Quarterly

Example Returns Data Report (PDF or Excel)

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Returns Technology & Systems

Reviews the software, hardware, and systems used to manage the returns process (e.g., WMS, CRM, return portals).

Returns Portal Integration

- [ ] Fully Integrated
- [ ] Partially Integrated
- [ ] No Integration

Average Time to Process Return Request (minutes)

Enter a number...

Describe the WMS (Warehouse Management System) used for returns.

Write something...

Return Status Visibility to Customer

- [ ] Real-Time Visibility
- [ ] Limited Visibility
- [ ] No Visibility

Screenshot of Return Tracking Screen (Customer View)

Upload File

Number of system errors/glitches reported per week related to returns.

Enter a number...

Which systems are used for return processing?

- [ ] CRM (Customer Relationship Management)
- [ ] WMS (Warehouse Management System)
- [ ] ERP (Enterprise Resource Planning)
- [ ] Custom Return Portal
- [ ] Spreadsheets (e.g., Excel)

Describe any known limitations or workarounds in the current systems impacting return efficiency.

Write something...

Returns Team & Training

Focuses on the personnel involved in returns processing, their training, and resource allocation.

Number of Team Members Dedicated to Returns Processing

Enter a number...

Current Team Structure (e.g., centralized, decentralized, hybrid)

- [ ] Centralized
- [ ] Decentralized
- [ ] Hybrid

Roles and Responsibilities Defined and Documented?

- [ ] Yes
- [ ] No
- [ ] Partially

Briefly describe the current training program for returns processing staff.

Write something...

Date of Last Comprehensive Training for Returns Team

Enter date...

Training Content Includes:

- [ ] Returns Policy and Procedures
- [ ] Product-Specific Handling
- [ ] Returns System Navigation
- [ ] Customer Service Skills
- [ ] Damage Assessment

Average Time Spent Training a New Returns Processor (in hours)

Enter a number...

Describe any observed gaps in team knowledge or skills.

Write something...

Returns Cost Analysis

Examines the financial impact of returns, including shipping costs, labor, and inventory write-offs.

Average Return Shipping Cost Per Unit

Enter a number...

Labor Cost Per Return Processed (in $)

Enter a number...

Percentage of Returns Due to Defective Products

Enter a number...

Average Restocking Fee Applied (if applicable)

Enter a number...

Average Inventory Write-Off Cost Per Return (for damaged or unsaleable items)

Enter a number...

Primary Method for Calculating Return Shipping Costs

- [ ] Flat Rate
- [ ] Weight-Based
- [ ] Dimensional Weight
- [ ] Carrier Calculated

Description of Cost Allocation Methods (e.g., how return costs are allocated to specific product lines or departments)

Write something...

Total Return Processing Costs for Last Period (e.g. month, quarter)

Enter a number...