



# The 30-Day Pre-Opening Cutover Checklist

40 things that have to be true before a multi-unit retail technology cutover — and the 9 that most teams miss.

**How to use this.** Print it. Walk it with the person who actually owns each item — not the person who reports on it. Any line where you can't name a human being and a date is a risk, not a task.

Timings are counted back from the opening or cutover date. If your date is inside 30 days and most of this is open, you don't have a checklist problem. You have a schedule problem, and it's better to know that now.

## T-30 · Confirm and freeze

*Everything downstream inherits the errors you leave in this section.*

- 01 ☐ **The date is confirmed by three parties, in writing** — operations, the general contractor, and the landlord. One party's verbal date is a hope.
- 02 ☐ **Certificate of Occupancy target is checked against the jurisdiction's actual inspection backlog**, not the permit timeline on paper.
- 03 ☐ **Circuit order verified by circuit ID with the carrier** — not by an account rep's assurance. Confirm the LOA/CFA and the physical demarc location.
- 04 ☐ **Failover path is physically diverse.** Two circuits from one provider on the same fiber run is one circuit with two invoices.
- 05 ☐ **Scope is frozen** — fixture plan, floor plan, register count, self-checkout count, fitting room and stockroom layout. Changes after today route through one named approver.
- 06 ☐ **Hardware bill of materials reconciled against the final floor plan** — quantity, model, and firmware target, including spares.
- 07 ☐ **One named owner for each domain:** network, POS, payments, AV/music, security and CCTV, EAS and RFID, back office. A person, not a department.
- 08 ☐ **Escalation matrix built with after-hours numbers** — and every number test-dialed once, today, while it's cheap to find out it's wrong.

## T-21 · Provision and stage

*Staged wrong is worse than not staged — it looks finished.*

- 09 ☐ **Hardware received at the staging site and physically counted** against the BOM. Not the store. Not a tracking number.
- 10 ☐ **Every device imaged and updated to the target firmware**, with the version recorded against the serial number.
- 11 ☐ **Payment terminals key-injected and confirmed against the correct merchant ID** for this specific location.

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- 12 ☐ **MID and TIDs created, and tender types on the terminal match tender types in the POS** — including gift card, store credit, and split tender, if they apply.
  - 13 ☐ **Store record built in the POS host** with correct tax jurisdiction, price zone, markdown and promotion rules, and hours.
  - 14 ☐ **Item file and price book reviewed by the operator** — the person who will run the store, not the vendor who loaded it.
  - 15 ☐ **Network configuration built and documented:** VLANs, SSIDs, firewall rules, and where the PCI segmentation boundary sits.
  - 16 ☐ **Low-voltage cabling walked with photos of every drop**, labeled and mapped to the floor plan.
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## T-14 • Validate

*"Installed" is not "tested." This section is where that distinction gets expensive.*

- 17 ☐ **Circuit delivered and tested** — throughput, latency, and failover proven in both directions.
  - 18 ☐ **Firewall or SD-WAN on site, configured, and reachable** from whoever supports it at 2 a.m.
  - 19 ☐ **Wireless survey performed after fixtures are installed.** A survey of an empty shell is a survey of a different building.
  - 20 ☐ **Every register, mobile POS device, receipt and label printer, drawer, scale, scanner, and RFID reader powered and communicating.** Every one, counted.
  - 21 ☐ **Test transaction on every register for every tender type** — including a return, an exchange, and a void, which fail differently than sales.
  - 22 ☐ **Offline mode tested by actually pulling the WAN.** Run a transaction, restore the link, confirm store-and-forward settles.
  - 23 ☐ **Every integration validated end to end, individually** — ecommerce and order management, BOPIS and ship-from-store, loyalty, gift, clienteling, labor and scheduling, inventory.
  - 24 ☐ **Peak-load test with every register open and transacting at once**, not one sale at a quiet counter.
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## T-7 • Rehearse

*The first time a crew touches the system should not be the first time customers do.*

- 25 ☐ **Full-day mock trading run with real staff on real hardware** at real volume assumptions.
  - 26 ☐ **Store manager and key holders trained — and a named backup trained for each role.** Someone will call out on day one.
  - 27 ☐ **Cutover runbook published:** sequence, timing, owner per step, and written go/no-go criteria.
  - 28 ☐ **Rollback plan written, with a decision point and a named decision-maker** who is authorized to call it.
  - 29 ☐ **Day-one support model confirmed:** who is on site, who is remote, and for exactly what hours.
  - 30 ☐ **Spare kit staged on site** — register, scanner, printer, router, cables, receipt and label stock, and the key-injection contact.
  - 31 ☐ **Written sign-off from the store manager** against the runbook. They are the one who lives with it.
  - 32 ☐ **Communication plan issued:** who gets notified at go, at each milestone, and at exception.
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## T-1 · Cutover day

- 33 ☐ **Go/no-go call held at a set time with every owner present.** The decision is recorded in writing.
- 34 ☐ **Final data sync completed and verified** — pricing, promotions, employees, tax tables.
- 35 ☐ **First live transaction executed and settled *before doors open*.** Not after the first customer is standing there.
- 36 ☐ **Batch settled at end of day one, and funds confirmed at the bank** within the expected window.
- 37 ☐ **Exception log opened and manned from the moment doors open.**

## T+1 to T+7 · Hypercare

- 38 ☐ **Daily standup for seven days with a written exit criterion.** Hypercare without an exit becomes the operating model.
- 39 ☐ **Every day-one exception closed or assigned with a due date** before hypercare ends.
- 40 ☐ **Post-opening review completed and the defect list fed into the next store's staging checklist.** This is the only item that compounds.

## THE SHORT LIST

### The 9 most commonly missed

*If you only walk nine lines, walk these. They share a trait: each one looks complete until the day it isn't.*

1. **Failover that isn't diverse.** Two circuits, one provider, one physical fiber path into the building. It passes every test you'll run and fails the one event it exists for.
2. **Key injection and merchant ID alignment.** The terminal powers on, takes a card, and prints a receipt — while routing to the wrong MID, or with returns pointed at a different merchant account. Nobody catches it until reconciliation, and by then it's a week of transactions.
3. **Offline mode that was assumed, not tested.** Almost every team says the system handles offline. Very few have pulled the cable in that store, on that hardware, and watched store-and-forward settle.
4. **A wireless survey done before fixtures went in.** Metal gondolas, fitting rooms, stockroom racking, and security gates change the RF environment completely. The pre-fixture survey was accurate about a building that no longer exists.
5. **Integrations tested as a group instead of one at a time.** Teams test "the POS" and declare victory, while seven downstream systems — loyalty, gift, ecommerce, inventory, labor — were never individually exercised. They fail one at a time, starting at the Saturday peak.
6. **Peak-load behavior.** One sale at a quiet counter runs perfectly. Twelve concurrent transactions across every open register expose a queue, network, or printer limit nobody wrote down.
7. **A rollback plan with no named decision-maker.** The plan exists. It's well written. At 6:40 a.m. on opening day, everyone on the call is waiting for someone else to be the person who says stop — so nobody does, and you open broken.
8. **Settlement confirmed at the terminal but not at the bank.** A batch closing successfully is not money arriving. The gap surfaces days later, usually as a finance escalation rather than a technology one.
9. **Hypercare with no exit criteria.** Support drifts indefinitely, the day-one defect list is never formally closed, and store number two inherits every single problem store number one had.

## WALK RECORD

### Who walked it, and when

*Fill this in on the floor, not afterward. An item with no name against it is the item that moves your date.*

Site or store number

Date walked

Walked with (name and role)

Opening or cutover date

Items with no owner and no date

Next walk scheduled for

## NOTES

### What you found

*Item number, what's actually true, and who owns closing it.*

#### If you can't name an owner and a date on five of these

That's not unusual, and it's not a reflection on your team. It's what happens when a rollout is staffed by people who also have day jobs, and nobody's full-time responsibility is the date itself.

That gap is what the **KeyDate Audit** exists for — a fixed-scope, two-week review that returns every material risk to your opening date with an owner and a mitigation attached. Independent. No vendor commissions, ever.

**Find fewer than five material risks and you don't pay the second half.**

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