

Holiday Prep Checklist

SEPTEMBER

- ○ - Monthly email campaign
- ○ - Plan for Operation Sparkle (toy drive)
- ○ - Draft holiday strategy meeting
- ○ - Draft holiday marketing plan (promos & social media)
- ○ - Q4 sales goals & analyze budget
- ○ - Order more inventory & supplies
- ○ - Research trends

OCTOBER

- ○ - Monthly email campaign
- ○ - Email to clients about Holiday shut down/scheduling
- ○ - Email to staff about Holiday shut down/scheduling
- ○ - Plan Holiday staffing - extra shifts etc.
- ○ - Organize Holiday party
- ○ - Plan gifts for staff
- ○ - Plan gifts for clients (mail outs etc)
- ○ - Hire & train seasonal workers
- ○ - Prep staff & client gifts

NOVEMBER

- ○ - Monthly email campaign with promos
- WT - Holiday meeting with staff (vacay time, blackout period, extra shifts, enthusiasm etc)
- WT - Holiday staff party
- ○ - Review shut down week with clients & deal with schedule accordingly
- WT - Decorate offices & locations
- WT - Begin Operation Sparkle

DECEMBER

- ○ - Monthly email campaign with promos
- WT - Start dispersing client gifts

PREP FOR NEW YEAR

- Review employee agreements, manual, policies
- Update website
- Social media plan
- Prep all tax documents + employee info
- Have all documents & employee agreements resigned for new year.
- Review insurances etc

HOLIDAY PARTY

- Determine type of event
- Choose theme & entertainment
- Choose date & time
- Find location & reserve
- Send invite to staff with details
- Determine alcohol policy and insurance
- Choose staff gifts
- Awards/recognition?

LEGEND

- ○ - office
- WT - with team