

For Small Businesses

Holiday Preparation Checklist

Planning & Preparation

1. Shift to Proactive Planning

Move from reactive to proactive planning to focus your attention ahead of time.

Work at least a quarter ahead to execute plans smoothly instead of reacting to problems

Start thinking about your busiest time of year well in advance.

Forecast sales based on previous years' growth and adjusting production accordingly.

If you rely on suppliers, place orders early to ensure you get what you need.

2. Performance Analysis

Audit your performance in previous years, identifying weaknesses, areas for growth, and strengths to build on.

Use Google Analytics and similar tools to understand customer interactions and purchasing behaviours on your website.

3. Financial Planning

Review your cash flow and budget to ensure you have additional capital for any changes or extra inventory.

Consider diversifying your suppliers. Evaluate domestic options to reduce supply chain disruptions and consider third-party manufacturing and logistics.

Tip

Download SBBC's **[free business plan template](#)** and cash flow forecasting tool.



4. Staffing and Scheduling

Set your holiday schedule as soon as possible to accommodate employee holiday plans.

Prepare for potential staff shortages due to illness or severe weather.

Be realistic about everyone's limits and hire extra staff or seasonal employees if needed.

Check-in with employees, staff, and partners to ensure everyone's voices are heard and needs are met.

Customer Engagement

1. Seasonal Products and Atmosphere

Have seasonal or holiday-specific products available to create anticipation and excitement.

Make your space, either physical or virtual, inviting and cozy for the holiday season.

2. Customer Engagement

Offer gift cards, both hard copies and digital gift cards.

Offer curated gift bundles or gift bag products to boost sales.

Ramp up holiday-themed posts and ads on social media.

Offer loyalty programs to keep customers returning.

3. Customer Experience

Optimize your website for a barrier-free experience, including mobile optimization and prioritizing customer service.

Offer flexible options like future-dated orders and last-minute delivery.

Maintain excellent customer service and quality control.

Consider adjusting shipping strategies to offer more local and last-minute delivery options.

4. Inventory and Supplies

Ensure you are well-stocked and prepared with inventory, packing supplies, and shipping supplies.

Research the competition and industry trends to adjust your strategy as needed.

5. Logistics and Deadlines

Keep a calendar with key dates like shopping events and shipping cut-offs, aligning them with your marketing plans.

Plan for potential delays and avoid last-minute expensive and risky expedited parcels.

Stress test your website servers and upgrade performance if needed to handle increased traffic.

Tip



Complete your own holiday shopping early to focus on your business during the holidays.

Holiday Marketing Plan

Create a dedicated holiday marketing plan across multiple channels and deploy it early to attract and engage customers. Here's a brief sample of a holiday marketing plan that you can use as a template to create your own:

Stage 1: Content Planning

Market Research

analyze last year's sales and market trends data

Create a Marketing Calendar

with key shopping dates, campaigns, and your content plans

Create holiday blog posts

such as gift guides, product features, and holiday prep tips

Email Marketing

send out "save the date" emails announcing upcoming holiday sales and events

Social Media

post holiday-themed teasers and promos on social media channels

Paid Advertising

launch targeted ads on Google, Facebook, and Instagram

Collaborate with Influencers

partner with local influencers for product reviews or holiday giveaways

Stage 2: Driving Sales

Early Bird Specials

Offer discounts and sales for early shoppers, encouraging folks to get their holiday shopping done sooner rather than later

Loyalty Programs

offer repeat and loyal customers early access or discounts

Social Media Contests

run contests and giveaways partnering with other small businesses to increase engagement

In-Store Events

host holiday-themed events such as hot cocoa bars or gift-wrapping stations.

Thanksgiving, Black Friday, Cyber Monday Promotions

expect when you will receive the most shoppers or web traffic and be ready with special deals and offers

Stage 3: Maximizing Sales

Gift Card Promotions

Highlight the convenience of gift cards for last-minute shoppers.

Email Urgency Campaigns

Send emails emphasizing limited-time offers, low stock warnings, and final "ship by" deadlines

Free Expedited Shipping

Promote free or expedited shipping options for last-minute shoppers.

Thank You Campaigns

Send thank-you emails and offer post-holiday discounts to customers.

Small Business BC is Here to Help

SBBC is a non-profit resource centre for BC-based small businesses. Whatever your idea of success is, we're here to provide holistic support and resources at every step of the journey. Check out our range of [business webinars](#), on-demand [E-Learning Education](#), our [Talk to an Expert Advisories](#), or browse our [business articles](#).