

The Ultimate Holiday Sales Checklist: 80 Steps to Prepare for Holiday Sales



Tick all the boxes in this printable checklist to prepare your eCommerce business for a successful holiday sale.

Prepare your offer

1. Decide on your inventory:

- Research the market and read the latest eCommerce reports to see which products are most likely to be in high demand.
- Create a list of inventory for your holiday sale and specify its amount.
- Order or produce the inventory as early as possible.

Tip: When making inventory decisions, also consider complementary products that you can use for cross-selling, as well as different versions of a product for upselling.

2. Decide the duration of your promo:

- Choose the promo dates. Are you planning to run the sale only on the holiday or also before and after it?

Tip: Extended sales will help you reach out to more people who shop for presents. Research the surest way of delivering orders before the holiday and ensure your customers that they will receive their purchase on time.

3. Craft your offer:

- Calculate the revenue you aim for and decide by how much you will cut the prices down.

- Consider an early delivery option or commit to having the product arrive before the holiday.
- Consider a "buy now — pay later" option.
- Additionally, offer gift wraps or a crafted card as an extra incentive to make a purchase.

Tip: Make sure that excessive discounts don't hurt you. Set a realistic revenue goal and craft your offer to reach your aim.

4. Research the offers from your competitors:

- Start checking competitors' websites to see if they have announced holiday deals.
- Check competitors' social media for sales-related posts.
- Sign up for your competitors' newsletter to see how they use email to promote holiday deals.
- Look for your competitor's ad creatives in Facebook Ads Library: filter by date range to see the latest ads.

Tip: Pay attention to discounts, vouchers, gifts, referral programs. Also, study the messaging and creatives to make sure your offer stands out.

5. Boost loyalty with exclusive deals for existing customers:

- Plan an offer only for your clients: early sales, free shipping, special sales, etc.
- Send out a sequence of 3 emails to your customers:
 - Announce the sale a couple of days in advance.
 - Announce the start of the sale.
 - Announce the last hours of the sale a couple of hours before it ends.

Prepare your website

7. Add "Running out of stock" field:

- Let your customers know which products are running out of stock to create a sense of urgency.

Tip: Use Shopify/BigCommerce apps, or WooCommerce extensions to automatically add the "Running out of stock" field.

8. Check your website speed:

- Check the load speed of your website using [Page Speed Insight](#) by Google.

Tip: The recommended speed for eCommerce sites is 2 -3 seconds.

Tip: Check this Shopify's article with recommendations on [how to optimize your site's speed](#).

6. Stay in touch with customers after the holiday sales:

- Define the methods and channels through which you will grow your email list, e.g. website pop-ups, subscription form in the website footer, "Subscribe to newsletter" checkbox on the order confirmation page.
- Create a content plan for your newsletters with useful tips, DIYs, featured products, special offers.
- Create a content plan for your social media for the holiday sale.

9. Make sure your website is ready for traffic increase:

- Check your website hosting plan and make sure that you can handle a significant increase in store visitors count.

Tip: If the volume of allowed traffic is smaller than what you expect, upgrade your plan or ask for a temporary increase for the time of the sale.

10. Optimize mobile version of your store:

- Test different flows of your website on the mobile phone: searching for products, viewing them, adding them to cart, checkout.
- Test your website using [Mobile-Friendly Test tool](#).

Tip: If you find some minor flaws, you can try solving them in the website admin. For more serious issues, ask for the developer's help.

11. Set up Facebook analytics tools:

- [Verify your domain](#) in Facebook Ads Manager.
- [Add Facebook Pixel](#) to your store.
- Prioritize Facebook events in the [Events manager](#).

12. Set up Google Analytics:

- Set up [Google Analytics](#) to see the revenue, shopping, and transaction activity, as well as how much traffic your store gets, where it comes from, and how people interact with your content.
- View Benchmark reports to understand how well your store is doing compared to competitors: Dashboard → Audiences → Benchmarking.
- Enable Site Search to understand what people look for on your website: Dashboard → Behavior → Site Search → Overview.

13. Heat maps and activity logs:

- Set up [heatmaps](#) and record user sessions to see how exactly your store visitors behave on site by viewing where they click, where their mouse is, and how much content on the web page they have seen.
- Set up [activity logs](#) to see checkout errors, page load, session duration, geolocation, peak activity, and more.

14. Test your checkout process:

- Go through your checkout flow to see how easy it is. Take notes of all potential problems and be sure to fix them.
- Add such services as Shopify Pay, Apple Pay, Google Pay to make check-out faster.

15. Add a [live chat](#) to your site to turn problems and doubts into purchases:

- Make a live chat available on the pages people see after clicking on ads and links in newsletters.
- If you have a dedicated page with all holiday offers, add a live chat to it as well.
- Have live chat available at the most important stages of the buying process: viewing cart, check out, filling details for delivery, etc.

16. Add Holiday sales banners to the website:

- Add a banner to your homepage, as well as the most visited pages.
- Turn off other banners to prevent visitors' cognitive overload.

Tip: On the banner, make sure to clearly explain what the offer is, when it starts, how long it lasts, and what users need to do to get it.

17. Update product descriptions:

- Make sure the description of all products on your website features essential information such as size, ingredients, manufacturer, country of origin, etc.
- Add buzzwords to your product description such as "limited offer", "only one left", "limited edition", "limited stock", etc.
- Use [Google Trends](#) to research keywords for your description so it's easier for people to find your products.
- Double-check that all your product images are of high quality and adequate size, and clearly demonstrate an item.



18. Explain your conditions to resolve any doubts:

- Clearly outline your Shipping Policy.
- Update your Refund Policy and make sure it's easy to find: add links to it to FAQs, footer, checkout, etc.
- Update your Privacy Policy. Make sure it clearly explains how the user data is collected, used, stored, and shared.
- Explain the conditions of your offers.
- Explain the loyalty program.

Tip: Think of the issues that you have run across with customers over the years and cover them in your FAQs.

19. Optimize how products are displayed:

- Group the products in such categories as "Gifts for Him," "Gifts for Her," "Family gifts," etc.

Run promos

22. Acquire new customers on Facebook and Google:

- Run Prospecting campaigns to target new people with relevant interests on Facebook and Instagram.
- Run Prospecting campaigns on Google to target relevant audiences with high buying intent.

Tip: Automate your ads with RetargetApp to be able to set up, run, and manage your campaign in a couple of clicks. You can use the app for the first 14 days for free.

- Add filters that enable shoppers to view items by discounts in different product categories.

20. Add reviews to your website:

- Add the most favorable reviews to your home page and to product pages.
- Add Trustpilot and Google Reviews widgets to your website.
- Enable customers to rate products, so shoppers can easily identify the most popular items.

21. Prevent cart abandonment:

- Add a pop-up that appears when people leave the website without checking out products in cart.
- Create and set up a Cart abandonment sequence of several emails.

Tip: Make your cart recovery tactic even more effective with Retargeting ads (see above) and Enhanced Cart Recovery ads by RetargetApp.

23. Re-engage store visitors:

- Run Retargeting campaigns on Facebook, Instagram to reengage your store visitors, including those who came there from Prospecting.
- Run Remarketing campaigns on Google and YouTube.

Tip: Consider running Special Offer ads by RetargetApp to retarget visitors within the past 90-days and people that added a product to cart in your store within the past 180-days.

24. Boost exposure of your products:

- Connect with social media influencers for possible partnerships.
- Pitch your products to bloggers who prepare gift guides.

Optimize operation & logistics

25. Plan delivery:

- Decide if you can offer free shipping and choose conditions: free worldwide shipping for everyone, free shipping if the order is at least \$XX, etc.
- Determine the geography of your shipping and how much it will take. Remember about the possible delays - and warn your customers about them.
- Research the delivery companies to find which one meets best your and customers' needs.

26. Provide fast personalized support:

- Prepare call, chat, and email scripts that resolve customers' doubts and issues in a fast, effective, pleasant, and consistent manner.
- Strengthen your support team with specialists from other departments during the holiday sale.
- If your team is pretty small, consider hiring customer support specialists for the sales season.



27. Improve order and fulfillment workflow:

- Make sure your order fulfillment space has necessary supplies, best-selling inventory, and packaging.
- Get help from your friends and family or hire seasonal workers to make sure you fulfill your orders fast.
- Decide on the criteria to prioritize orders to quickly decide which ones to fulfill first.

Tip: Consider the following criteria for prioritizing orders: customer priority, shipping, product type.

28. Develop backup plans:

- Create a strategy for handling issues with shipping: delivery delays, mixed orders, damaged products, etc.
- Plan a roadmap of how you will handle possible inventory shortages and issues with suppliers.
- Think of how you will handle customer complaints, canceled orders, bad reviews, negative comments, and chargebacks.



Measure sales

29. Analyze Facebook Ads Manager and Google Ads reports:

- Analyze ad performance data from [Facebook Ads Manager](#) to understand how well your Facebook and Instagram ads have performed, how much sales they brought, and what is your ROAS.
- Analyze ad performance data from [Google Ad Manager](#) to understand how well your ads performed on Google.

Tip: If you run automated ads with [RetargetApp](#), you can view the most important metrics on both Facebook, Instagram, and Google right in your RetargetApp dashboard.

30. Analyze your wins and losses for the next year:

- Gather and process all the data from the sources listed above and compare them against the plans you set before the sale.
- Research market reports on the holiday sales results in eCommerce to see how they are different from yours.
- Analyze what has worked well - to use it again - and what didn't - to improve it next year.
- Make your own checklist based on your findings for the next year.



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