



Retail

Year-End Marketing Checklist

Ready to get more sales this holiday season? Use this checklist to get ahead of the game and finish the end of the year strong.

Sell more this holiday season

Whether you're a seasoned online retailer, or if this is your first holiday season selling online, we are here to help you take full advantage of holiday spending.

We're sharing checklists for each of the three phases of a holiday marketing strategy: planning, taking action, and preparing for after the holidays. Following these checklists will guide you through your most important to-dos so you can be sure this season is your most prosperous yet!



By being aware of the different phases of a holiday marketing strategy, you can stay organized throughout the process and ensure you have a successful season!

Plan for key holiday opportunities

Planning your marketing for the holidays is the foundation of a prosperous season. Use these to-dos to help develop a well-thought-out plan and ensure your marketing efforts are focused and effective.

Create holiday offers

- Determine your goal
- Who are you trying to reach?
- What do your best customers find valuable?
- Create your offers

Grow your email and SMS lists

- Entice people to join your email and SMS lists
- Create a pop-form for your website
- [Create a sign-up landing page](#) for your location and physical events using a QR code generated in Constant Contact

Note: Click the 'Share' button for sharing options including a ready-to-use QR code

- Share your sign-up landing page on social, ads, and email

Segment your email lists

- [Segment your list](#) to send more targeted, relevant offers
 - Early-bird shoppers — send content and offers early in the season
 - Deal seekers — focus on discounts and key shopping days (Black Friday and Cyber Monday)
 - Last-minute shoppers — send last-chance offers and reminders
 - Evergreen shoppers — engage throughout the season
 - VIPs — create unique offers such as exclusive bundles

Get ready for online sales

- Add an online store or create shoppable landing pages
- Optimize your product descriptions
- Identify shipping and pick-up options — in-store or curbside pickup
- Connect your existing shopping cart or store to Constant Contact
 - Shopify
 - WooCommerce
 - BigCommerce
 - Ebay

Automate your email and SMS messages

- [Create automated communications](#) using Automation Path Builder for when your audience takes actions or hits milestones (subscribes to a list, has an upcoming birthday, or clicks an email link)

Take action on your year-end marketing plan

Now that you have your plan in place, it's time to take action and make it happen! Create a buzz and get people excited about what you have to offer by completing these action items.

Update your website

- Update your website with holiday hours
- Highlight holiday offers in your [sign-up form](#) to grow your list

Update listing and review sites

- Update your information on listing and review sites (holiday hours & your offers)

Update your branding in online marketing tools

- [Get your custom branding added in Constant Contact](#) using BrandKit (insert your website URL, and BrandKit will scan your website and add your logo, colors, and images)
- Double-check that your branding on any design websites you use is updated

Create and send your holiday offer via email

- Schedule emails to promote offers — announce, remind, and give people a last chance to buy

Update profiles and engage on social media

- Update profile information with your holiday hours
- Share helpful, valuable information to stay top-of-mind
- Encourage people to join your email list
- [Schedule posts on social media](#) to promote offers, announcements, last-chance reminders, and sales

Create and send your campaign messages via email and SMS

- Use creative subject lines generated for you by Content Generator
- [Get engaging email and SMS content](#) using Content Generator
- Schedule emails and SMS messages to promote your campaign
- Send a 'thank-you' email or SMS message

Use paid advertising

- Use [Facebook lead ads to grow your email list](#) before the holiday season
- Use [Facebook](#), [Instagram](#), and/or [Google Ads](#) to drive traffic and sales

Prepare for ongoing success after the holidays

Even though the holiday season is over, your job is not finished! Here are some actions you can take to ensure success throughout the year.

Review and take action

- Review the results to understand what worked and what didn't
- Further segment lists based on purchase behavior
- Create an after-holiday offer to capitalize on gift cards/cash people receive
- Start [planning for consistent marketing](#) in the new year

Refresh and Reset

- Update your website, social, emails, and any other marketing materials to remove holiday-specific messaging
- Look at your holiday content and identify if any of it can be repurposed into evergreen content

Continue the conversation

- Send thank-you emails or social shoutouts to customers
- Send a survey to let people share their feedback about their purchase
- Share a poll on social to get feedback about what your audience wants to see from your business in the new year
- Offer loyalty perks, discounts, or early access to turn seasonal buyers into repeat customers