



**WORKFORCE &
BUSINESS DEVELOPMENT**

SHOP SMALL SATURDAY & HOLIDAY SEASON

PREPARATION GUIDE

Successful preparation for Shop Small Saturday requires a blend of marketing, inventory management, staffing, workspace operations, and cleanliness. Follow this checklist with meticulous attention to detail to maximize the chance of attracting and retaining customers.



SHOP SMALL SATURDAY & HOLIDAY SEASON PREPARATION GUIDE



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1. Physical Storefront Preparation

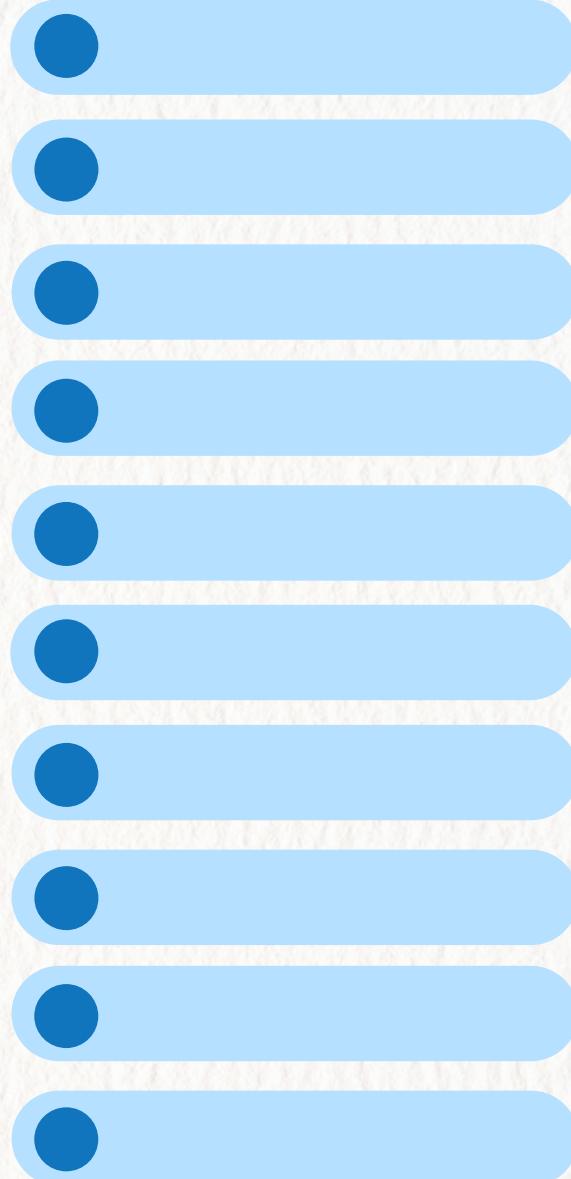
Deep Clean

- Focus Areas:** Go beyond surface cleaning. Deep-clean floors, windows, shelves, fitting rooms, restrooms, and high-traffic areas. Ensure every area of the store feels fresh and organized.
- Fixtures and Displays:** Dust, polish, and repair any store fixtures. This is especially important for older displays, as they can collect dust or appear worn over time. Clean light fixtures and replace any bulbs to brighten up the space.
- Professional Help:** Consider hiring a cleaning service for a thorough pre-season cleaning. Professional cleaning can help make everything sparkle, especially in hard-to-reach or neglected areas.
- First Impressions Matter:** Remember that cleanliness contributes to customers' first impressions of your store. A clean environment signals quality, which can positively impact purchasing behavior.

Holiday Decor

- Brand Consistency:** Decorate with a theme that aligns with your brand personality. For instance, if your brand has a modern and minimal aesthetic, keep the decor sleek and elegant. If your brand is more traditional, incorporate classic elements like wreaths, garlands, and ornaments.
- Lighting:** Lighting sets the ambiance and can create a warm, inviting feel. Consider adding soft string lights to shelving or entryways. LED candles and soft uplighting in product displays can also make products feel festive and high-end.
- Themed Displays:** Use holiday-themed props, like gift boxes, ribbons, or ornaments, but avoid overcrowding. Place decorations in focal points around the store, such as the entrance, checkout area, and product displays, to create an immersive experience without overwhelming the shopping space.
- Scent & Sound:** Engage all senses to create a memorable experience. Use holiday-scented candles (like cinnamon or pine) or essential oils with diffusers, and play holiday music at a moderate volume to build the holiday spirit.

Cleaning Tasks



Merchandise Layout

- **Seasonal Product Placement:** Position holiday-specific or popular products in high-traffic areas, ideally near the entrance or checkout area. Ensure these items are front and center, as they are likely to be high demand and quick to sell.
- **Feature Giftable Items:** Create a "Gift Ideas" section, categorizing products by recipient type, such as "For Him," "For Her," "For Kids," "Under \$50," and "Stocking Stuffers." This makes it easier for customers looking for last-minute gifts or ideas.
- **Product Bundles:** Consider pre-packaging popular products in bundles, which can be more attractive and convenient for customers. Add holiday packaging for bundles, like festive wrapping or gift boxes, to make them feel special.
- **Traffic Flow:** Ensure aisles and sections are easy to navigate. Avoid overcrowding, as too many items can create a cluttered feel. Use markers or floor decals if needed to encourage flow toward key product areas.

Window Display

- **Draw Attention:** Make your window display festive and visually compelling. Use a strong focal point, like a large holiday prop, to catch attention, and arrange products around it.
- **Highlight Special Promotions:** If you're running a special holiday sale, like "20% off holiday items" or "Buy One, Get One 50% Off," place this information prominently in the display. Use bold, easily readable fonts to ensure promotions are clear.
- **Add Motion Elements:** Items that move or change attract attention. Consider a rotating display, faux snowfall, or a digital element if possible. Movement draws the eye and can help increase foot traffic.
- **Use Props Wisely:** Less can be more when it comes to props. Choose 1-3 major items that convey the holiday spirit (like wrapped gifts, holiday trees, or garlands) and add smaller accents as needed. Ensure the products themselves remain the stars of the display.

Signage

- **Clear & Attractive:** Signage should be well-designed, with large, clear text that is easily readable from a distance. Stick with simple fonts and holiday-themed colors that don't clash with your existing brand color scheme.
- **Directional Signage:** Use clear signage to guide customers through your store, labeling sections like "Holiday Specials," "New Arrivals," "Best Sellers," and "Gift Ideas." This helps improve the shopping experience, especially when the store is busy.
- **Promotional Signage:** Highlight any special deals or events using signage placed in high-traffic areas. If you have promotions for Black Friday or Small Business Saturday, put these signs near entrances, display windows, and checkout counters.
- **In-Store QR Codes:** Consider adding QR codes on signage that lead customers to your website for more details on holiday deals, event registrations, or to sign up for exclusive discounts. This is especially helpful if you're limited on in-store space but want to engage with customers further.



Visit American Express.com to order Free Signs & Supplies for the Shop Small Saturday & Holiday Signage!

www.americanexpress.com/us/merchant/shop-small/materials.html

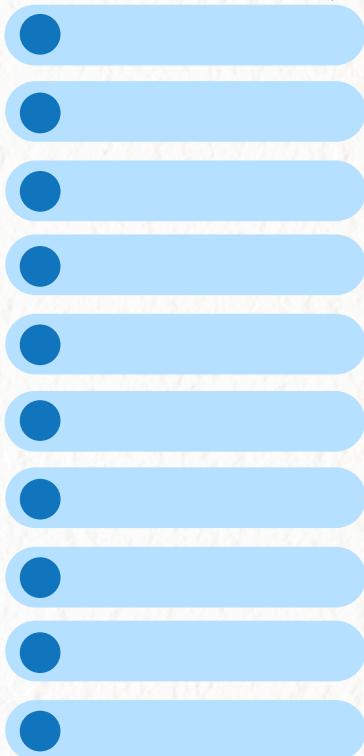


Best Practices and Tips for Store Presentation

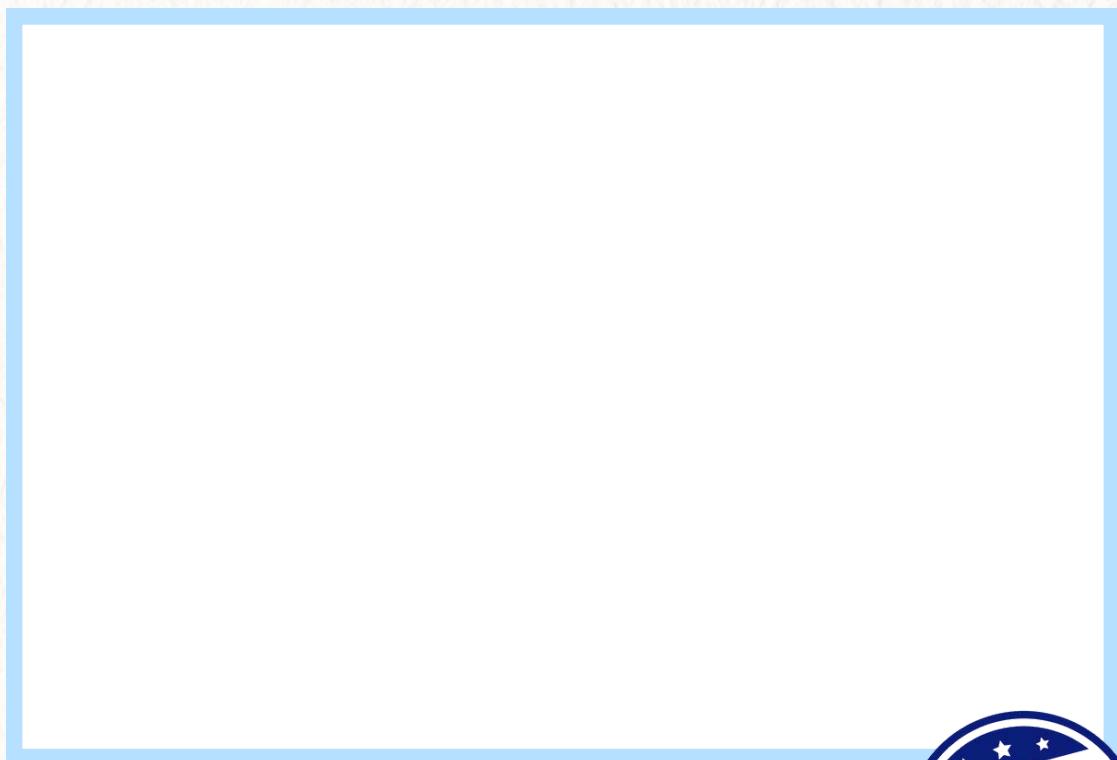
- **Maintain Daily Upkeep:** Keep your store looking fresh by tidying up frequently throughout the day. If customers see products well-organized, they'll feel more inclined to explore.
- **Staff Uniform or Dress Code:** Encourage staff to wear holiday-themed accessories, like Santa hats, pins, or scarves, to bring a cheerful vibe into the store.
- **Keep Stocked & Rotated:** Refill empty shelves quickly, and rotate merchandise so it looks refreshed. Avoid leaving noticeable gaps, as empty shelves can create a sense of scarcity.
- **Customer Flow Insights:** Use customer flow data if available to identify which areas receive the most traffic. This insight allows you to optimize your product placement by putting high-interest items in these zones.
- **Gift Wrapping as a Service:** If possible, offer complimentary or paid gift wrapping. A wrapping station near checkout can provide convenience for customers while adding value to their shopping experience.

Preparing your storefront and business for the holidays with these thoughtful touches can significantly enhance the shopping experience, leading to greater customer satisfaction and higher holiday sales.

Daily Cleaning



Notes



2. Inventory Management

Stock Up on Bestsellers

- **Analyze Past Sales Data:** Review last year's holiday sales data to identify bestsellers and high-demand items. Look for patterns in customer preferences, price points, and categories that sold particularly well.
- **Anticipate Demand:** If you expect increased demand for specific items this year, consider ordering even more than in the past. Items like holiday decorations, themed apparel, tech gadgets, and popular toys often see high demand.
- **Set Reorder Points:** Establish reorder points for bestsellers and high-turnover items. Use real-time inventory tracking to alert you when stock levels are running low so you can replenish items quickly.
- **Collaborate with Suppliers:** Communicate with your suppliers about projected demand for bestsellers, ensuring they can meet your needs. If possible, negotiate priority shipping or a pre-arranged restocking schedule to keep up with demand.

- **Best Practices:**
 - **Prioritize Top Sellers:** Ensure high-traffic items are easily accessible and displayed prominently. Make these items easy to find to encourage quick decisions for shoppers.
 - **Create Bundles:** Offer bestsellers in bundles, which can increase their appeal. For instance, if candles are top sellers, create a "holiday relaxation" bundle with candles, a cozy blanket, and seasonal tea.

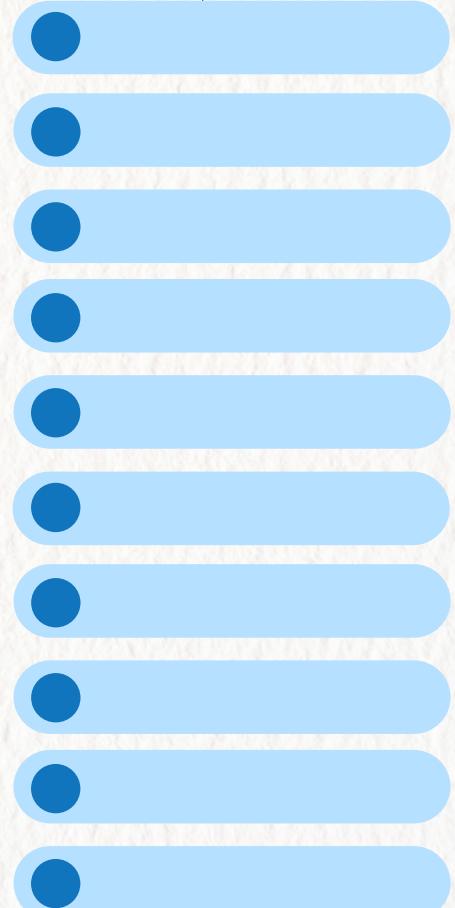
Order Seasonal Items Early

- **Identify Seasonal Trends:** Seasonal products can vary each year, so research current trends in your industry. For example, if you're in retail, trending colors, materials, or products (such as eco-friendly or personalized items) can help drive sales.
- **Early Ordering:** Supply chain issues and delivery delays are more likely during the holidays, so place orders for seasonal items early to ensure timely arrival. Stock up on holiday-specific items such as themed decor, unique gifts, and popular seasonal products.
- **Establish a Backup Plan:** If suppliers cannot meet demand, have alternative suppliers or comparable substitute products available. In high-demand seasons, this extra step helps ensure you aren't left without key inventory.

- **Best Practices:**

- **Pre-Sell or Tease New Products:** Start teasing limited-edition or seasonal products on social media and through email campaigns. This can help gauge interest and prioritize the restocking of popular items.
- **Label and Organize Storage:** Seasonal items should be organized by category in your stockroom for easy restocking. Labeling can streamline the process and reduce restocking time, ensuring that holiday items are quickly accessible.

Trending Products



Plan for Last-Minute Shoppers

- **Stock Small, Giftable Items:** Last-minute shoppers often look for convenient, grab-and-go items that make easy gifts. Stock smaller items like candles, accessories, travel-sized beauty products, or pre-made gift baskets to appeal to these customers.
- **Pre-Assembled Gift Sets:** Ready-to-go gift sets with holiday packaging can save last-minute shoppers time and increase impulse purchases. Package small items like bath sets, snack bundles, or stationery as easy-to-purchase gifts.
- **Offer Gift Cards:** For those truly last-minute customers, gift cards are essential. Consider offering small incentives, like "Get \$5 back with every \$50 gift card purchase," to make them more appealing.
- **Stay Stocked on Impulse Buys:** Place small, inexpensive items at the checkout counter to appeal to impulse buyers. This can include stocking stuffers like ornaments, mini candles, chocolates, or festive mugs.

- **Best Practices:**
 - **Highlight the "Last-Minute Gifts" Section:** Set up a dedicated section or display in your store for last-minute gift options. Label it clearly, and add signage to guide hurried shoppers directly to it.
 - **Create Urgency:** Use messaging like "Last Chance to Buy" on displays or signage near the entrance and checkout area. Highlighting urgency can drive customers to make decisions quickly.

Backup Supplies

- **Gift Wrapping Supplies:** Order a surplus of bags, tissue paper, ribbons, and gift boxes to meet the increased demand for gift wrapping. Ensure that these are color-coordinated with the holiday season or store brand.
- **Shopping Bags and Packaging:** Stock enough shopping bags in various sizes to accommodate different products, as well as bubble wrap, protective packaging, and shipping boxes if you handle deliveries.
- **Holiday Tags and Cards:** Offer customers the option of adding a small gift tag or holiday card with their purchase. Small touches like this can add to the holiday experience and set your business apart.
- **Point of Sale Supplies:** Keep backup receipt paper, ink cartridges, shopping bags, and credit card readers to avoid last-minute mishaps that could interrupt sales.

- **Best Practices:**

- **Gift Wrapping Station:** If space allows, set up a designated wrapping area for gift wrapping. Have wrapping paper, scissors, tape, ribbons, and tags ready and organized for efficient packaging.
- **Branded Packaging:** Consider using holiday-themed, branded packaging. Unique bags and boxes are not only practical but also serve as a marketing tool when customers carry them outside your store.



Local organizations such as 4-H and Scout Troops may be potential partners for volunteers who might be available for gift-wrapping services. Many of these groups are seeking opportunities to provide youth with valuable skills for future careers and enhance their community involvement.



Additional Tips for Inventory Management Success

- **Regularly Track Inventory Levels:** Check inventory daily or weekly to stay informed about stock levels and avoid running out of popular items.
- **Forecast Sales:** Use last year's sales data and current year trends to forecast inventory needs, setting clear goals for each product line.
- **Customer Wishlist Feature:** If you have an online store, consider adding a wishlist feature where customers can save desired items, helping you gauge potential demand for specific products.
- **Prepare for Returns:** Have a return and exchange policy in place and clearly communicated. Accepting returns easily and efficiently, especially after the holidays, helps maintain a positive customer experience.
- **Inventory Management Software:** Use software to track stock levels, automate reorder points, and monitor sales trends. This is especially helpful for small businesses, as it streamlines inventory management and reduces human error.

Effectively managing inventory is essential to maximizing holiday sales and ensuring a smooth customer experience. These best practices can help prevent out-of-stock situations, improve customer satisfaction, and boost overall holiday revenue, setting your business up for success in the busiest season of the year.

Here are five free inventory management systems that small businesses can use, especially during the busy holiday season:

- **inFlow Inventory**
 - inFlow offers a free version for small businesses which includes basic inventory tracking, order management, and reporting. It's user-friendly and suitable for various retail environments.
- **Zoho Inventory**
 - Zoho Inventory has a free plan that allows for basic inventory tracking, order management, and integration with other Zoho apps. It's great for small businesses looking for a scalable solution.
- **Square Inventory**
 - If you're using Square for payments, their inventory management tool is included for free. It allows you to track stock levels, manage items, and sync with your Square sales.
- **Odoo**
 - Odoo offers a free community version that includes basic inventory management features. It's open-source and can be customized to fit your business needs, though it may require some technical setup.
- **ABC Inventory**
 - ABC Inventory is a free desktop application that offers comprehensive inventory management features. It's particularly useful for businesses that need detailed tracking and reporting without ongoing costs.



These systems can help streamline your inventory processes and manage stock effectively during the holiday rush!

3. Staffing & Scheduling

Hire Temporary Staff

- **Start Early:** Begin the hiring process well in advance of the holiday season (typically 1-2 months before peak times). This allows time for thorough training and onboarding, ensuring temporary hires are confident and prepared by the time holiday traffic increases.
- **Identify Key Roles:** Assess the specific roles and responsibilities where you need additional help. Consider roles such as cashier, stockroom assistant, customer service representative, and gift wrapper. Allocate roles based on anticipated demand and specific holiday needs.
- **Flexible Staffing Options:** Look for candidates with flexible availability, including weekends and evenings, as these will likely be high-traffic periods. Temporary workers like college students or retirees may be open to flexible, short-term hours and can fill gaps in the schedule.
- **Targeted Recruiting:** Post job listings on job boards, social media, and community bulletin boards to attract local talent. Consider partnering with staffing agencies or local job fairs to reach a wider candidate pool.
- **Onboarding and Training:** Develop a streamlined onboarding process that covers essentials like company policies, expectations, and holiday promotions. Provide training on customer service, product knowledge, and technical skills (like POS systems) early on.

Create Holiday Schedule

- **Identify Peak Hours:** Review past sales data to identify peak shopping times. Common peak periods include weekends, Black Friday, evenings, and the days leading up to key holidays. Plan staffing levels to accommodate these high-traffic times, with more employees on the floor to handle customer needs.
- **Create a Fair Scheduling System:** Set up a rotating schedule that allows employees to share in both high-traffic and quieter shifts. This helps prevent burnout and maintains morale by allowing all team members time off to enjoy the holiday season.
- **Flexible Scheduling:** Consider allowing flexibility within the schedule to accommodate personal commitments and prevent employee burnout. Shift-swapping or offering split shifts can help balance employee needs while covering necessary hours.
- **Double-Check Legal Compliance:** Be mindful of labor laws, particularly regarding overtime pay, break requirements, and limits on working hours. Check regulations for holiday pay, as some areas may require it or have specific overtime rates for holidays.
- **Best Practices:**
 - **Publish Schedule Early:** Share the schedule at least 2-4 weeks in advance so employees can plan around their holiday responsibilities.
 - **Use Scheduling Software:** Utilize scheduling software or apps that allow employees to view and swap shifts. Platforms like When I Work, Homebase, or Deputy can simplify scheduling and reduce conflicts.
 - **Plan for Absences:** Prepare for the unexpected by identifying backup staff members who can cover shifts in case of illness or emergencies. This helps ensure business continuity without overloading the team.

Customer Service Training

- **Holiday-Specific Customer Service:** Develop a holiday customer service guide that addresses common holiday-related inquiries and challenges, such as return policies, gift-wrapping requests, and handling high-volume sales days. Emphasize empathy and patience, as customers may feel stressed or rushed during the holiday season.
- **Train on Handling Returns and Exchanges:** The holidays bring an increase in returns and exchanges. Train staff on the return policy, including time limits, refund types, and any product-specific conditions. Ensure they know how to handle exceptions or workarounds, such as issuing store credit instead of cash refunds.
- **De-Escalation Techniques:** The holiday rush can sometimes lead to heightened customer emotions. Equip staff with de-escalation techniques, such as active listening, showing empathy, and finding solutions for unhappy customers. Use role-playing scenarios during training to help staff practice these skills.
- **Product Knowledge:** Customers may have more specific questions about products during the holiday season. Provide staff with product training, especially on seasonal items, gift bundles, and bestsellers. Well-informed employees can better assist customers in making purchase decisions, which can lead to increased sales and customer satisfaction.
- **Upselling and Cross-Selling:** Train staff on how to upsell and cross-sell appropriately by understanding customer needs and suggesting complementary products. For example, if a customer buys a gift set, the associate could recommend a gift card or a matching accessory.

• Best Practices:

- **Holiday Role-Playing Exercises:** Use role-play exercises to simulate common holiday interactions, from handling crowded checkout lines to managing stressed customers. Practicing these scenarios helps staff feel more prepared.
- **Encourage Teamwork:** Encourage staff to work as a team, assisting each other during busy times. Consider rewarding employees who go above and beyond to help customers or their team members.
- **Focus on Positive Language:** Train employees to use positive language that frames interactions constructively. For instance, rather than saying, "We're out of stock," staff could say, "I'll check if we have an alternative option for you."



Step-By-Step Guide: How to Handle Customer Complaints

This article provides some very insightful and helpful steps for addressing unhappy customers' complaints.

www.helpscout.com/helpu/customer-complaints/



The quickest and simplest method to support staff members in recovering from challenging customer interactions is to commend their skills and ability to manage the situation. Ensure that your praise is genuine and tailored to the individual.



Unhappy Customers? Remember the H.E.A.T. Process

H **Hear Them Out**
(People want to be heard and validated)

E **Empathize with their feelings**
(Let Customers know that you can relate to why
they are upset)

A **Ask questions to fully understand their
issue / situation.**

T **Tell Them What You CAN Do For Them**
(Don't talk about what you "can't" do)



3 Steps for Self-Care

1. Take time to breathe (spend a few moments just focusing on your breathing as it will calm your mind and physical reaction to the situation).
2. Relax your muscles.
3. Tell yourself that anything negative said to you is not true.

Additional Tips for Successful Holiday Staffing

- **Set Clear Policies:** Establish clear, written policies for key holiday practices such as handling multiple customers, returns, upselling, and gift-wrapping services.
- **Recognize Hard Work:** Acknowledge and reward hard-working employees. Small rewards like gift cards, thank-you notes, or end-of-day team gatherings can boost morale during the busiest times.
- **Create a Holiday Survival Kit for Staff:** Provide essentials like water, snacks, hand sanitizer, and a holiday playlist to keep staff motivated and comfortable.
- **Offer Incentives:** Consider offering incentives for staff who work during peak times. This could be in the form of bonuses, extra time off after the season, or employee-of-the-month recognitions.
- **Review and Adapt:** Check in with the team after particularly busy days to gather feedback on what worked and where there were challenges. This helps you make quick adjustments and create a better plan for the next rush.

Investing in holiday staffing, scheduling, and training can make a significant difference in your team's ability to provide excellent service, handle the increase in traffic, and maintain morale. With the right approach, a well-prepared staff can contribute to a successful holiday season and help you achieve higher customer satisfaction and sales.

Indeed.com's Tips on How to Manage Holiday Schedules

www.indeed.com/hire/c/info/how-to-manage-holiday-scheduling

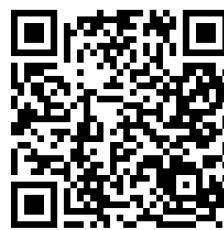


Ways to Reward Staff

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Zoomshift.com's Tips on How to Manage Holiday Scheduling for Your Employees

www.zoomshift.com/blog/holiday-scheduling/



Square's Tips on How to Manage Employees' Holiday Schedules Without Going Nuts

squareup.com/us/en/the-bottom-line/growing-your-team/how-to-manage-employees-holiday-schedules-without-going-nuts



4. Promotions & Discounts

Black Friday Promotions

Black Friday is known for deep discounts, and customers expect substantial deals on high-demand items. Consider these approaches to build a compelling Black Friday promotional strategy:

- **Deep Discounts on Bestsellers:** Identify your top-performing products and offer significant discounts on these items. Select products that not only draw attention but also showcase your brand's quality and uniqueness.
- **Exclusive Bundles:** Create product bundles that offer a higher perceived value at a reduced price. Bundles encourage customers to purchase multiple items and are particularly effective when including bestsellers or holiday-specific products.
- **Tiered Discounts:** Implement a tiered discount structure, such as "Spend \$50, get 10% off; Spend \$100, get 20% off," to encourage higher purchase values. This type of promotion works well for stores that offer a variety of price points or products with cross-selling potential.
- **Flash Sales:** Run limited-time flash sales to create a sense of urgency and encourage quick purchases. Promote flash sale times on social media, email, or your website to generate anticipation. Use countdown timers on your website or in-store signage to heighten urgency.
- **Early Access for VIP Customers:** Consider offering early access to Black Friday deals for loyal or VIP customers. Send exclusive email invitations or private links, creating a sense of exclusivity and strengthening customer relationships.

- **Best Practices:**
 - **Promote Black Friday Deals Early:** Start building anticipation a week or two before Black Friday through social media, email newsletters, and in-store displays.
 - **Limit Stock on Doorbusters:** Create high-demand products with limited stock to encourage early shopping and increase the perceived exclusivity of your offers.
 - **Upsell at Checkout:** Add complementary items at a slight discount in the shopping cart to increase the average order value.

My Black Friday Plan

Available Resources

S.M.A.R.T. Plan

Specific, Measurable,
Attainable, Resourced,
and Time-Management

Small Business Saturday Promotions

Small Business Saturday is an opportunity to attract customers who are consciously shopping local and supporting small businesses. Create promotions that reflect your unique offerings and community-oriented values.

- **"Shop Small" Discounts:** Offer modest discounts to celebrate Small Business Saturday. Instead of deep discounts, focus on offering something special like 10% off storewide, double loyalty points, or "buy one, get one half-off" to encourage community support.
- **Free Gift with Purchase:** Offer a small gift with purchases over a certain amount. This could be something branded (like a tote bag) or a holiday-themed item that fits well with your store's brand.
- **Local Collaboration:** Partner with nearby small businesses to offer cross-promotions, such as a joint discount when customers show receipts from other local stores. This encourages customers to visit multiple businesses in the area.
- **Gift-Wrapping Services:** Provide complimentary or discounted gift-wrapping services on Small Business Saturday. This can save time for customers and add a personal touch to their shopping experience.
- **Community Events:** Host in-store events like a meet-and-greet with local artisans, a holiday market, or a charity drive. Providing an experience or social cause can help build connections with customers who prioritize community-focused shopping.

- **Best Practices:**
 - **Emphasize the Community Impact:** Use signage, social media, and email marketing to remind customers how their purchase supports a local business. Incorporate messaging that resonates with the "Shop Small" movement.
 - **Personalize the Customer Experience:** Small Business Saturday is a great time to create a warm, memorable experience with personalized service, handwritten thank-you notes, or free samples.
 - **Extend Loyalty Rewards:** Double or triple loyalty points on Small Business Saturday to incentivize return visits and deepen customer loyalty.

My Shop Small Saturday Plan

Available Resources

S.M.A.R.T. Plan

Specific, Measurable, Attainable, Resourced, and Time-Management

Gift Card Promotions

Gift cards are a popular holiday gift, providing flexibility for the recipient and guaranteed revenue for your business. Offering bonuses or special incentives can make gift cards an even more attractive purchase.

- **Buy \$50, Get \$5 (or \$10) Bonus:**

Create a straightforward gift card promotion where customers who purchase a certain amount receive an additional bonus card. For example, "Buy a \$50 gift card, get a \$5 bonus" is a classic way to encourage higher spending on gift cards.

- **Gift Card + Small Gift:** Offer a small physical gift (like a holiday ornament, keychain, or mini product) with each gift card purchase over a certain amount. This makes the gift card feel more personal and special.

- **Gift Cards as Upsells:** Train employees to suggest gift cards at checkout as an "add-on" for anyone purchasing gifts, especially for customers who seem undecided about what to buy.

- **Digital Gift Cards for Convenience:** If possible, offer digital gift cards that can be emailed to recipients instantly. These are ideal for last-minute shoppers or customers who prefer to shop online.

- **Best Practices:**

- **Promote Gift Cards as a Go-To Gift:** Highlight gift cards as a convenient option for those who might not know what to get. Use phrases like "The perfect gift for anyone!" in your promotions.

- **Encourage Post-Holiday Use:** Set up a "bounce-back" coupon that can be used in January or February when customers redeem their holiday gift cards, helping to drive post-holiday traffic.

My Promotional Plans

Available Resources

S.M.A.R.T. Plan

Specific, Measurable, Attainable, Resourced, and Time-Management

Bundle Discounts

Creating attractive bundles of popular products is a great way to offer value, move inventory, and present ready-made gifts for holiday shoppers.

- **Curate Thoughtful Bundles:** Choose products that complement each other to create a cohesive bundle. For instance, a "Winter Wellness" bundle could include a cozy blanket, tea, and a scented candle.
- **Holiday-Themed Packaging:** Present bundles in attractive, holiday-themed packaging like festive boxes, reusable baskets, or branded wrapping. Display these bundles prominently in-store and on your website.
- **Tiered Pricing:** Offer bundles at different price points to cater to various budgets. For example, create a small, medium, and deluxe version of a similar theme (like a "Coffee Lover's Bundle") to appeal to different spending levels.
- **Limited Edition Holiday Bundles:** Add a sense of exclusivity by offering limited-time-only holiday bundles. Highlight that these are available only during the season, creating urgency for customers to purchase before they're gone.

• Best Practices:

- **Showcase in Store and Online:** Create a designated area in-store and a dedicated section online to feature bundles. Use clear signage or "Gift Idea" labels to attract gift shoppers.
- **Highlight Savings:** When displaying bundles, include signage that emphasizes the savings versus buying each item individually. This helps customers see the value in the bundle.
- **Social Media Showcases:** Post product bundle photos and videos on social media to attract interest and generate ideas for holiday gift-givers.

Additional Tips for Successful Holiday Promotions

- **Promote Early and Frequently:** Start promoting holiday discounts, gift cards, and bundles well before the holiday rush. Use a countdown on social media and in email newsletters to build excitement.
- **Create a Holiday Promotional Calendar:** Outline when each promotion will run, when to post on social media, and any emails that need to go out. Consistent and strategic timing helps ensure promotions reach customers at the right moments.
- **Leverage Influencer or Community Partnerships:** Partner with local influencers, bloggers, or community organizations to spread the word about holiday deals and events. These collaborations can bring new customers into your store.
- **Encourage Email and SMS Signups:** Offer exclusive deals to email or SMS subscribers, like early access to Black Friday deals or Small Business Saturday sales. Growing your list now can help you engage more customers during the season and beyond.

Effective holiday promotions, coupled with strategic timing and attractive packaging, can drive substantial traffic to your business. By building a variety of discounts and exclusive offers, you not only increase sales but also enhance your brand's appeal and make the holiday shopping experience memorable for customers.

How can you incorporate your business's "Secret Sauce" into your Holiday Promotions?

An illustration of a red glass bottle with a yellow label and a yellow cap. A black speech bubble is attached to the bottle's neck, pointing upwards and to the left.



My "Secret Sauce"

What makes my business stand out ("Secret Sauce") from the competition this Holiday Season?

How do I make customers aware of my "Secret Sauce?"

Keap.com's Tips on Top 5 Holiday Promotions

keap.com/small-business-automation-blog/marketing/holiday-promotion



Paypal's Tips on 20 holiday promotion ideas for small businesses

www.paypal.com/us/brc/article/holiday-promotion-ideas



Pixolabo.com's Tips on Winning Strategies for Small Businesses

pixolabo.com/31-essential-small-business-holiday-marketing-tips/



"Secret Sauce" S.M.A.R.T. Plan

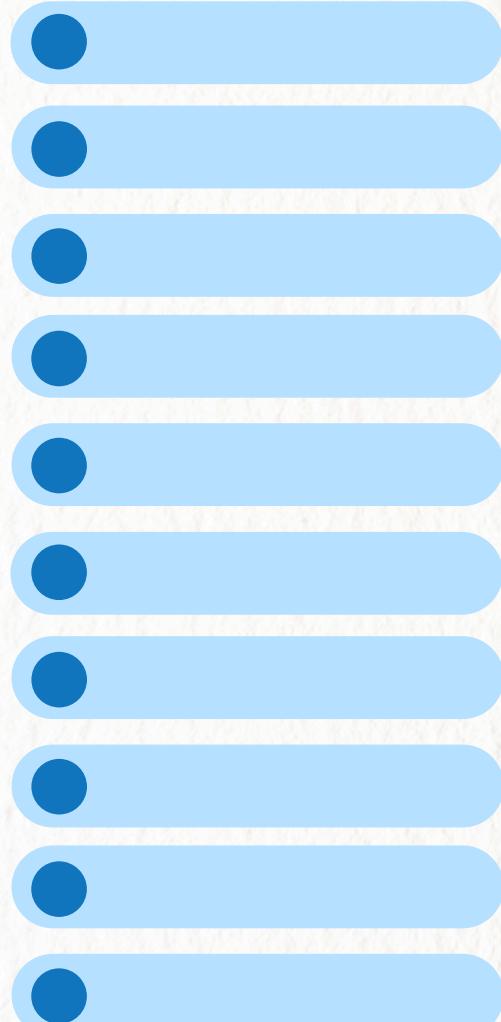
5. Marketing Strategy and Content Creation

Black Friday, Small Business Saturday & Holiday Season Marketing

Each holiday shopping event has its own flavor, so tailor your marketing for maximum impact.

- **Black Friday:** Focus on time-sensitive discounts, limited offers, and deep discounts on popular items. Build excitement with sneak peeks and countdowns across platforms, emphasizing urgency.
- **Small Business Saturday:** Showcase the value of shopping locally. Share personal stories about your business, highlight community connections, and promote the unique benefits of supporting small businesses. Offer personalized services and exclusive experiences.
- **Holiday Season:** Emphasize gift-giving, family, and holiday traditions. Create gift guides, offer easy gift bundles, and promote any personalized or premium services (like gift wrapping or custom messages) that add value to the holiday shopping experience.

What Advertising Channels
Are Available to Me?



What Has Worked Well In the Past?

Social Media Marketing Ideas

A strong social media presence builds brand awareness, engages followers, and drives conversions. Here are specific social media strategies for the holidays:

- **Countdown to the Holidays:** Use daily or weekly countdown posts leading up to events like Black Friday, Small Business Saturday, and key holiday shopping days. Share sneak peeks of sales, special promotions, and new arrivals.
 - **Tips:** Use a countdown timer in stories or a “countdown” sticker. Pair each countdown post with product highlights to entice potential buyers.
- **Holiday Giveaway:** Host a festive giveaway with holiday-themed prizes (products, gift cards, etc.) to encourage engagement.
 - **Tips:** Increase participation by asking followers to tag friends, share your post, or repost to their stories. Giveaways are particularly effective on Instagram and Facebook.
- **Product Highlights and Gift Guides:** Feature top-selling items and gift guides by theme or budget (e.g., “Gifts Under \$25” or “Gifts for Adventurers”). Highlighting products with different price ranges helps appeal to a broad audience.
 - **Tips:** Use carousel posts for multiple products and include video or live demos to showcase standout features.
- **“Shop Small” Stories:** Share personal stories about your journey as a small business owner and your connection to the community. Emphasize the importance of supporting local businesses and how it impacts the local economy.
 - **Tips:** Create a hashtag specific to your business for the holiday season (e.g., #ShopLocalWith[YourBusiness]) and encourage customers to share what shopping small means to them.
- **Holiday-Themed Photoshoot:** Share festive images of your decorated storefront, holiday inventory, or your team preparing for the season. Visuals with seasonal decor create a warm, inviting atmosphere.
 - **Tips:** Use cohesive colors and props for a consistent holiday aesthetic. Include behind-the-scenes shots for authenticity.
- **User-Generated Content:** Encourage customers to share photos of their purchases or in-store experiences, tagging your business. Reposting customer content builds social proof and a sense of community.
 - **Tips:** Use hashtags, offer incentives like discounts or small prizes for participation, and set up a dedicated area in-store for customers to snap photos.

Content Calendar

Suggestions

A holiday content calendar keeps your marketing efforts organized and ensures you don't miss any key dates. Here's a suggested breakdown:

- **November:**
 - **Focus:** Promote Black Friday and Small Business Saturday. Introduce gift ideas and early holiday promotions.
 - **Content Ideas:** Announce Black Friday deals, share “Shop Small” stories, and offer holiday preparation tips for customers.
- **December:**
 - **Focus:** Continue holiday-themed content, spotlight last-minute gift ideas, and provide promotions for December events.
 - **Content Ideas:** Post product demos, “12 Days of Deals,” gift bundles, and customer appreciation shoutouts. Highlight deadlines for guaranteed holiday delivery if you offer shipping.
- **Post-Holiday Season (January):**
 - **Focus:** Promote “bounce-back” coupons, clearance sales, and New Year offers to keep traffic up after the holiday season.
 - **Content Ideas:** Encourage customers to redeem their coupons, highlight new inventory, and share resolutions or wellness products for the New Year.

Social Media S.M.A.R.T. Plan

Notes

Social Media Trends



Share heartwarming stories about your business, your customers, or the holiday spirit to connect on a deeper level



Email Marketing Campaign Ideas

Email is one of the most effective ways to directly reach your customers. Use segmented campaigns and time-sensitive messages to drive conversions.

- **Holiday Countdown Series:** Send a series of emails that count down to Black Friday, Small Business Saturday, and other key shopping dates. Share sneak peeks, early access information, and a countdown to the sales.
 - **Tips:** Build anticipation by increasing frequency as the shopping day approaches. Keep messages brief and visually engaging.
- **VIP Early Access:** Reward email subscribers with exclusive early access to your holiday deals or private sales.
 - **Tips:** Make subscribers feel valued by addressing them personally and offering them a special code or early shopping hours.
- **Gift Guides:** Send themed gift guides with curated product selections for different types of recipients (e.g., "Gifts for the Foodie" or "Best Stocking Stuffers Under \$20").
 - **Tips:** Include direct links to each product, add a mix of price points, and include a call-to-action button like "Shop the Gift Guide."
- **Abandoned Cart Reminders:** Remind customers who added items to their cart but didn't complete the purchase.
 - **Tips:** Use a friendly tone and offer a discount or free shipping to encourage them to complete the purchase.

Website & SEO

Optimize your website and SEO strategy to capture holiday traffic and increase visibility for seasonal products.

- **Holiday Landing Pages:** Create specific landing pages for Black Friday and Small Business Saturday. These pages can feature special offers, bestsellers, and exclusive holiday products.
 - **Tips:** Use keywords like "holiday sale," "Black Friday deals," and "gift ideas" to improve search rankings.
- **Update SEO Keywords:** Incorporate seasonal keywords in your product descriptions, blog posts, and landing pages. Popular holiday keywords include "gift ideas for [recipient]," "Christmas gifts," and "small business holiday deals."
 - **Tips:** Use tools like Google Trends or Ubersuggest to find trending holiday keywords and update website metadata accordingly.



Countdown Timer
Add a countdown timer on your homepage for specific promotions, like Black Friday deals or special discounts. Countdown timers create urgency and encourage faster purchases.

Notes

In-Person Marketing Ideas

For brick-and-mortar locations, in-person marketing events and services enhance the holiday shopping experience and encourage customer loyalty.

- **Holiday Open House:** Host an in-store event with holiday music, refreshments, and exclusive discounts. This can be a fun and festive kickoff to the season.
 - **Tips:** Schedule it in mid-November or early December. Collaborate with nearby businesses to cross-promote and increase attendance.
- **Gift-Wrapping Station:** Offer free or discounted gift wrapping with purchases, which adds value and makes shopping more convenient for customers.
 - **Tips:** Set up a small station near checkout, and if possible, offer branded wrapping paper or gift tags for added brand recognition.
- **Holiday Workshop or Class:** Host a workshop, such as a holiday wreath-making class or DIY gift event, to bring in customers and provide an engaging experience.
 - **Tips:** Offer attendees a small discount on their purchases during the event, or provide a gift bag with promotional materials and small items.
- **“Bounce-Back” Coupon:** Offer a coupon with every holiday purchase that's redeemable in January, encouraging customers to return after the holiday season.
 - **Tips:** Make it a small but appealing discount (e.g., “10% off your January purchase”) to drive post-holiday traffic and increase repeat business.
- **Small Business Saturday Specials:** On Small Business Saturday, consider offering loyalty points, a small gift with a purchase, or a raffle entry for customers. Emphasize the uniqueness of your business and build customer relationships by providing a memorable experience.

Notes

These marketing strategies create a robust holiday season plan that attracts customers both online and in-store, fosters engagement, and encourages repeat visits. With strategic planning, personalized service, and a well-executed holiday marketing plan, you can make the most of the season and set your business up for continued success into the new year.



6. Bounce-Back Coupons & January Promotions

My Bounce-Back Plan

Bounce-Back Coupons

Bounce-back coupons are discounts or incentives given during the holiday shopping period, redeemable in January. These coupons serve two purposes: they reward loyal holiday shoppers and motivate them to return during the slower post-holiday period.

Best Practices for Bounce-Back Coupons:

- **Timing and Placement:** Hand out bounce-back coupons during peak holiday shopping days, such as Black Friday and Small Business Saturday. Make sure they're included with every purchase, either in-store or online.
 - **Tip:** Attach them to the receipt or insert them in the shopping bag, along with a "thank you" note to make the offer feel more personal.
- **Discount Structure:** Offer a discount that's valuable enough to attract customers but not so steep that it affects profitability. Options include:
 - A dollar-off amount, such as "\$10 off a \$50 purchase."
 - A percentage discount, like "15% off your January purchase."
 - A free item or service with a purchase, such as a free accessory with a \$30 purchase.
- **Expiration Date:** Set a clear expiration date to create urgency. Typically, a bounce-back coupon is valid only during January, driving foot traffic or online engagement right after the holidays.
 - **Tip:** Experiment with slightly shorter expiration dates, such as "Valid from January 2 to January 20," to increase the urgency. This also helps smooth out foot traffic across the month.
- **Terms and Conditions:** Be clear about any restrictions, such as minimum purchase requirements or exclusions (like sale items).
 - **Tip:** To avoid potential confusion, print the terms and expiration date directly on the coupon.
- **Tracking:** Keep track of bounce-back coupon redemptions to assess the program's success. This helps you refine the offer for future promotions and understand customer behavior.
 - **Tip:** Use unique coupon codes or ask customers to provide an email address to redeem the offer for easier tracking.

Available Resources

S.M.A.R.T. Plan

Specific, Measurable, Attainable, Resourced, and Time-Management

January Promotions

January is often a slower retail month, making it an ideal time to run promotions that clear out seasonal inventory and attract post-holiday shoppers.

Best Practices for January Promotions:

- **New Year's Deals:** Start the year with New Year's sales or promotions that tie into common resolutions, like wellness, organization, or productivity.
 - **Example:** If you sell fitness or wellness items, offer a "New Year, New You" discount on related products.
- **Clearance Sales for Leftover Holiday Stock:** January is a prime time for clearance sales, which help clear holiday-specific or older inventory to make room for spring products.
 - **Tip:** Clearly label these items as part of an "After-Holiday Clearance" or "Seasonal Closeout" event. Customers are often motivated to purchase during these sales to find deals on last-minute holiday items or gifts for the next year.
- **"Refresh for the New Year" Theme:** Promote items that fit a "fresh start" narrative, such as home organization, wellness, self-care, or educational products.
 - **Tip:** Create in-store or online sections for "New Year Refresh" or "Kickstart Your Year" categories to help customers easily locate these items.
- **Offer Exclusive Experiences:** January is a great time to introduce small events or classes that align with customer goals, like workshops on organization, meal planning, or self-care.
 - **Tip:** For added appeal, offer discounts on products related to the class or workshop theme.

Loyalty Program Boost

Boosting your loyalty program with double points for January purchases is a great way to reward returning customers and encourage new loyalty sign-ups. It not only drives sales but also strengthens long-term customer relationships.

Best Practices for a Loyalty Program Boost:

- **Double Points Promotion:** Offer double loyalty points on all January purchases, encouraging customers to return after the holiday season.
 - **Tip:** Advertise the double points as a "Limited-Time New Year Offer" to make it feel exclusive and time-sensitive.
- **Highlight Redemption Options:** Promote the benefits of earning extra points by clearly explaining what customers can redeem them for, such as discounts, freebies, or exclusive perks.
 - **Tip:** Include loyalty program details on receipts, in thank-you emails, and on social media to increase awareness.
- **Incentivize Referrals:** Encourage loyal customers to refer friends by offering extra points for both the referring customer and the new joiner.
 - **Tip:** Promote the referral bonus as a "New Year's Gift" for sharing their experience with friends, making it feel like a thoughtful gesture.
- **Email Campaigns:** Use email to remind existing loyalty members of the double-points offer and share additional promotions or product recommendations. This can be particularly effective for online customers who may not be as aware of in-store promotions.
 - **Tip:** Segment your email list by loyalty program members and non-members, offering a special incentive to non-members to join.
- **Set Up a "New Year's Rewards" Tier:** If you offer tiered loyalty rewards, create a special tier for January with enhanced perks, like early access to spring products or a larger birthday reward.
 - **Tip:** Market this tier as a "New Year's Exclusive," encouraging members to make purchases early in the year.

My January Plan

Available Resources

S.M.A.R.T. Plan

Specific, Measurable,
Attainable, Resourced,
and Time-Management

Notes



Tips for Marketing Bounce-Back Coupons and January Promotions

- **Social Media Teasers:** Promote bounce-back offers on social media to build anticipation and create awareness. Use countdowns to the redemption start date and make posts visually engaging.
- **Email Reminders:** Send email reminders after the holidays, reminding customers of their January coupon or loyalty benefits. Include an image of the coupon or a clear call-to-action to prompt them to visit.
- **Point-of-Sale Display:** Display bounce-back offers and January promotions prominently at checkout. This way, customers are more likely to take notice, even if they miss an online announcement.
- **Collaboration with Local Businesses:** Work with nearby businesses for joint bounce-back promotions, encouraging customers to shop locally in January. For example, a neighboring coffee shop might offer a discount to your customers, and vice versa.

By implementing bounce-back coupons and well-timed January promotions, you can extend the holiday shopping season's momentum and drive early-year revenue. These strategies not only boost January sales but also strengthen customer loyalty by keeping your business top-of-mind and rewarding customers for their continued patronage.

For business owners preparing for the holiday season, here are in-depth resources that cover a wide range of strategic tips, marketing advice, and operational preparation to maximize holiday success.

1. Small Business Administration (SBA): Holiday Marketing Strategies

The SBA provides resources and guidance tailored to small business needs, covering topics like seasonal marketing, customer retention, and financial planning. Their holiday-focused materials offer ideas for leveraging community support and planning successful seasonal promotions.

- SBA Holiday Marketing Strategies:
<https://www.sba.gov/blog/holiday-marketing-strategies>

2. Google My Business: Optimize for the Holiday Season

Google My Business (GMB) optimization is crucial for holiday visibility. Updating business hours, highlighting promotions, and ensuring accurate information can help attract more local customers. Google also offers resources on creating holiday posts, adding photos, and promoting seasonal offerings directly through GMB.

- Optimize Google My Business for the Holidays:
<https://support.google.com/business/answer/9435771>

3. Shopify Blog: Holiday Marketing Tips & Tricks

Shopify's blog is a great resource for e-commerce businesses. It provides comprehensive holiday marketing tips, including how to prepare product listings, run effective email campaigns, and optimize checkout processes. Shopify's guides also cover strategies for both large and small businesses, making it adaptable to diverse needs.

- Shopify Holiday Marketing Tips:
<https://www.shopify.com/blog/holiday-marketing>



4. HubSpot: Holiday Marketing Guide

HubSpot offers an in-depth holiday marketing guide with strategies across social media, email marketing, and content planning. They also provide downloadable resources, templates, and example campaigns that can help businesses plan well-targeted holiday campaigns. This guide is ideal for businesses looking to streamline and structure their holiday outreach.

- HubSpot Holiday Marketing Guide:
<https://blog.hubspot.com/marketing/holiday-marketing>

5. General Small Business Resource Hubs

Several organizations and websites offer resource hubs with tools and guides specifically for small business owners:

- American Express Shop Small: Focuses on strategies for Small Business Saturday and provides downloadable marketing materials.
<https://www.americanexpress.com/us/small-business/shop-small/>
- U.S. Chamber of Commerce Small Business Resources: Offers insights and guides for operational and marketing improvements.
<https://www.uschamber.com/co/run/business-financing/holiday-sales-strategies>

6. BigCommerce: Holiday Marketing Tips for Small Businesses

BigCommerce provides a holiday marketing guide covering promotional strategies, website preparation, and analytics tracking for small businesses. Their guide also offers insights into creating holiday bundles, managing inventory, and improving website performance to handle increased traffic.

- BigCommerce Holiday Marketing Guide:
<https://www.bigcommerce.com/blog/holiday-marketing/>

7. SCORE: Holiday Preparation for Small Businesses

SCORE offers a range of articles and webinars focused on small business holiday preparation, including inventory management, staffing, and financial forecasting. SCORE's resources are especially useful for business owners looking for comprehensive planning templates and access to small business mentors.

- SCORE Holiday Preparation Guide:
<https://www.score.org/blog/holiday-prep-small-businesses>

8. Facebook Business: Holiday Marketing Toolkit

Facebook's holiday marketing toolkit helps small businesses reach audiences on social media through targeted advertising, holiday content ideas, and ad optimization tips. Facebook's guide is particularly useful for local promotions and offers examples of successful holiday campaigns.

- Facebook Holiday Marketing Toolkit:
<https://www.facebook.com/business/holidays>

9. Etsy Seller Handbook: Holiday Selling Tips

For makers and craft-based businesses, Etsy's Seller Handbook offers detailed advice on preparing for the holiday season, including inventory planning, promotional strategies, and optimizing product listings. Their guide also covers best practices for managing increased customer inquiries and fulfilling holiday orders.

- Etsy Holiday Selling Tips:
<https://www.etsy.com/seller-handbook/article/ultimate-guide-to-holiday-prep/41620263160>

10. Constant Contact: Holiday Email Marketing Tips

Constant Contact's holiday email marketing guide helps businesses develop effective email strategies for the season. The guide includes tips on email timing, segmenting audiences, and crafting holiday-themed content, making it an ideal resource for businesses wanting to enhance their email outreach.

- Constant Contact Holiday Email Marketing:
<https://blogs.constantcontact.com/holiday-email-marketing-tips/>

Here are 20 No-Cost Tools to help you organize and prepare your small business for the holiday shopping season:

Organization and Planning

- Google Calendar: Schedule appointments, deadlines, and events.
- Trello: Visualize tasks and projects with Kanban boards.
- Todoist: Prioritize tasks and set reminders.
- Google Keep: Capture ideas, notes, and lists.
- Google Docs: Create and collaborate on documents.

Marketing and Promotion

- Canva: Design social media graphics, flyers, and more.
- Mailchimp: Create and send email newsletters.
- Hootsuite: Schedule social media posts.
- Google My Business: Manage your business listing on Google.
- Pinterest: Create visual boards to showcase products.

Inventory and Sales

- Google Sheets: Track inventory, sales, and expenses.
- Wave Accounting: Basic accounting and invoicing software.
- Zoho Inventory: Manage inventory and fulfill orders.
- Square: Process payments and manage sales.

Customer Service and Communication

- Slack: Team communication and collaboration.
- Zoom: Video conferencing for meetings and webinars.
- Google Meet: Free video conferencing for up to 100 participants.
- HubSpot CRM: Manage customer relationships and track interactions.

Website and E-commerce

- WordPress.org: Build a website with free themes and plugins.
- Shopify: Create an online store with a free trial.

Additional Tips:

- Start Early: Begin planning and preparing well in advance.
- Set Clear Goals: Define your holiday sales targets and marketing objectives.
- Create a Marketing Plan: Develop a comprehensive marketing strategy.
- Optimize Your Website: Ensure your website is mobile-friendly and fast.
- Offer Promotions and Discounts: Attract customers with special deals.
- Provide Excellent Customer Service: Respond promptly to inquiries and resolve issues.
- Track Your Performance: Monitor sales, website traffic, and social media engagement.



By utilizing these free tools and following these tips, you can effectively organize and prepare your small business for a successful holiday shopping season.