shopifyplus

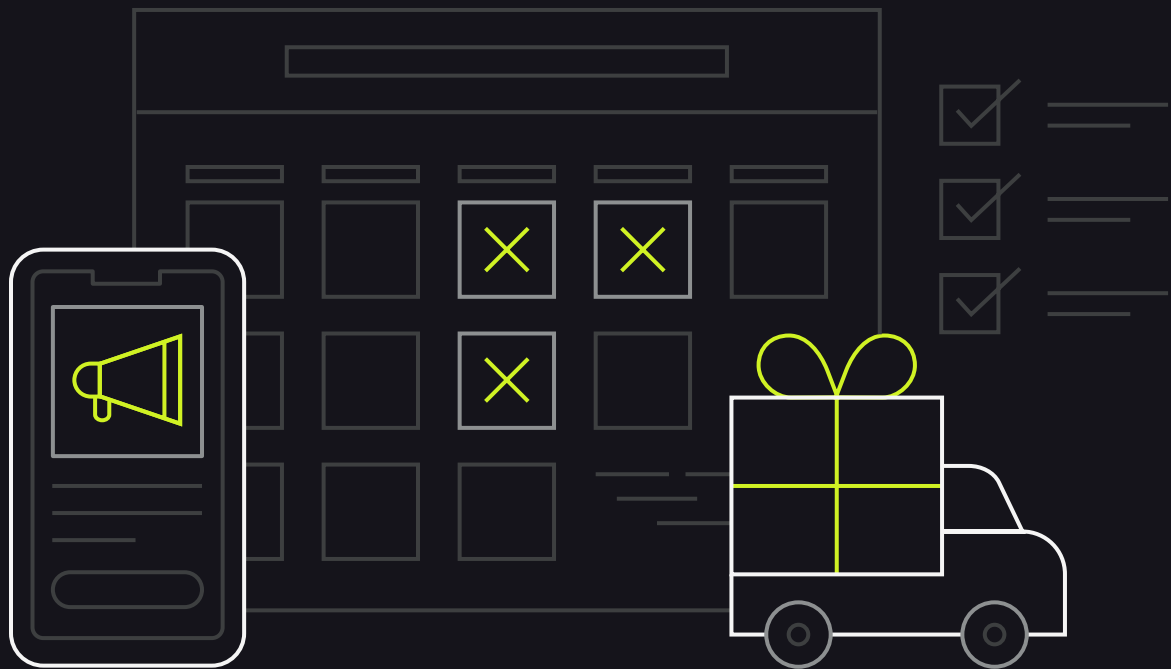# 2020 12-Point Holiday Checklist

Prepare for the upcoming holiday season.

2020 12-point holiday checklist

To help you be even more prepared for the holiday season, we've created a 12 point checklist. This checklist is filled with small, actionable tips you can use to ensure you have a rewarding and stress-free holiday season.

1. Create an Omnichannel experience for your customers

Omnichannel retailing puts your customers, not your product, at the center of your marketing. It's an immersive approach to sales and marketing that integrates all of your channels into a single experience, rather than thinking of each channel as an independent silo.

Your customer will have several different touchpoints with your brand, whether it's your website, brick and mortar location, social media ads, email marketing campaigns, etc.

An omnichannel approach allows you to communicate with your customer by understanding how they navigate your brand and the channels you've chosen to incorporate into your strategy. This is beneficial for your customer as it anticipates where they are in the customer lifecycle and creates a seamless experience with your brand. It also removes any friction within checkout by anticipating that not all buying journeys are linear – which can help you better understand how your customer's shop.

To understand how your customers engage with your channels you can use the Google Analytics Conversion Probability Report. This will show you data from all of your channels surrounding acquisition, behavior, and conversion.

For a more in-depth look, you can take our course on Omnichannel Retailing.

2. Create an irresistible offer

Many retailers use enticing discounts to motivate customers to visit and purchase from their stores. If you're hesitant on over-discounting you could also consider other common BFCM promotions including:

- **Deeper discounts** when customers bundle products. For instance, Buy 1 item: save 15%, Buy 2 items, save 20%, and so on. You can also offer a free gift with purchase or, set a minimum purchase amount that entitles a customer to receive a free gift with their order.

- **Gamifying your offers.** GLD Shop created a great example of this with their very own mobile game GLD Digger where players could earn exclusive discounts. **Bonus:** They also collected leads through Facebook login in the game.

- **Time-sensitive discounts.** These help to distinguish your sale from other brands and create a sense of urgency. For example, you could try encouraging your customers to help spread the word about your promotions, by offering a % off for a retweet or referral. UK fashion brand Hype offers a great example of this below:

- **Offering special daily deals or doorbusters** are also great ways to drive customer excitement. Shoppers are compelled to complete their purchase to avoid missing out on the limited time offer.

3. Leverage automation tools like Scripts, Flow, and Launchpad to increase efficiency

The holiday season is a time to spend with friends and family. It's not the time to be up until the crack of dawn setting up discount codes. Or triple checking everything on your campaign to-do list. You can use Shopify apps to automate your checklists and ease your mind. Below are some brief descriptions of apps we think will benefit you and how you can use them specifically for the holiday season.

Shopify Scripts

Shopify Scripts are small pieces of code you can use to customize your cart and checkout. You can use scripts to create discount codes, modify your checkout, and tailor your shipping options. To create scripts you will need to download the Shopify Scripts app.

Below is a list of common Shopify Scripts and ways you can use them to build powerful holiday promotions.

VIP Customers

Use these scripts to reward your loyal customer base. Customers buy more from brands they know during the holidays. You will want to remember that these scripts are a starting off point. They need to be customized and you will require a developer if you do not have prior experience with Ruby code.

- Discount for 'VIP' tagged customers
- X$ off if customer accepts marketing
- Have Made at least X orders in the past get $Y off
- Have Made at least X orders in the past get Y% off

For all of the scripts above, you will use the Tagged Customer Discount and use the customizable settings at the top to tailor the script to each suggestions.

Sitewide Discount

Use this script for a holiday flash sale. Build scarcity by only offering this discount for a limited time window.

- Sitewide Discount

Minimum Spend Discounts

Use these scripts to reward customers who spend more and increase your average order value.

- [Free gift when you spend $X](#)
- [Spend at least $X, Get $Y off](#)
- [Spend at least $X, Get Y% off](#)

Here are some additional resources on Shopify Scripts:

- Get Started with Shopify Scripts: [A Practical Walkthrough](#)
- Learn more about using the Scripts Editor in the [Shopify Help Center](#)
- Explore script builders, [Shopify Script Creator](#) and [Playwright](#), which do not require previous coding experience

Launchpad

Once you've finalized your holiday promotions, take advantage of [Launchpad](#) to plan your campaigns in advance. Launchpad is a Shopify Plus app that allows you to schedule events like product releases, inventory updates, sales, and theme changes. It also syncs with Shopify Scripts so you can schedule some of the discounts we recommended in the last section.

This video demonstrates how to [schedule an event in Launchpad](#):

Launchpad is going to be key in your planning phase. Consider these questions below and decide what you can automate ahead of time for a stress-free holiday season.

- Are you getting new inventory?
    - Schedule inventory updates to coincide with your purchase orders
- Planning a promotion?
    - Set your Shopify Scripts to go live on your offer date
- Will you have new content for your website?
    - You can make your changes in the theme library in your admin and decide when those changes go live.
- Launching new products during the holidays?
    - Set the release date you want the products to go live

Shopify Flow

Shopify Flow automates your daily tasks at both the store and organization level. You can make templates that consist of triggers, conditions, and actions.

For the holiday season, we've put together workflow templates that you can install. These templates will help you with order management, customer relations, and inventory.

1. Message your fulfillment team to prepare for an on-site/curbside pickup

2. Expedited shipping notification for your logistics team

3. Hide out-of-stock products, pause marketing efforts, and republish products When Back in Stock

4. Organize Products for Improved Visual Merchandising and Accurate Search Results

5. Receive a notification when product inventory goes below a certain threshold

6. Track and Reward Your Top Customers

7. Email a customer when a wishlist item is on sale

4. Plan your go-to-market strategy

You can do this by creating a holiday marketing activities calendar so that you can lay out a clear timeline of when you want to publish your sale specific ads, social media campaigns, email campaigns, and blog posts. You will also want to schedule when you want to change over your homepage hero image or banner to support your sale.

Tip: Use Launchpad to pre-schedule the sale version of your store theme to go live on your website at a specific time and date. This eliminates the need to update your customized sale theme in real-time!

Plan out any additional promotional content you'll want to publish leading up to and over your sale periods such as gift guides or exclusive daily product and collection releases.

5. Look for ways to optimize your abandoned cart emails

Abandoned carts remain one of the top reasons for lost revenue.

According to a 2018 study by Forter, roughly 80% of US shoppers said they had second thoughts about completing a purchase.
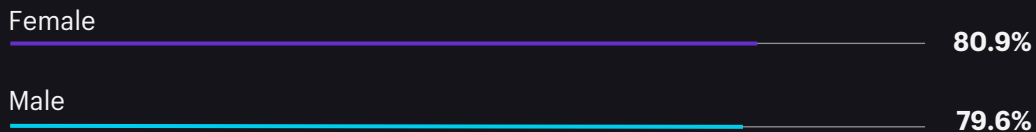
To win over undecided customers, consider creating an abandoned cart email sequence with multiple emails and personalized content. This will help you rise above all of the holiday noise and get your customers to convert.

Reminding your customer of their purchase, sharing testimonials, and offering discounts is a great jumping-off point for your strategy. You can learn more tactics for abandon cart emails in our Email Marketing Course.
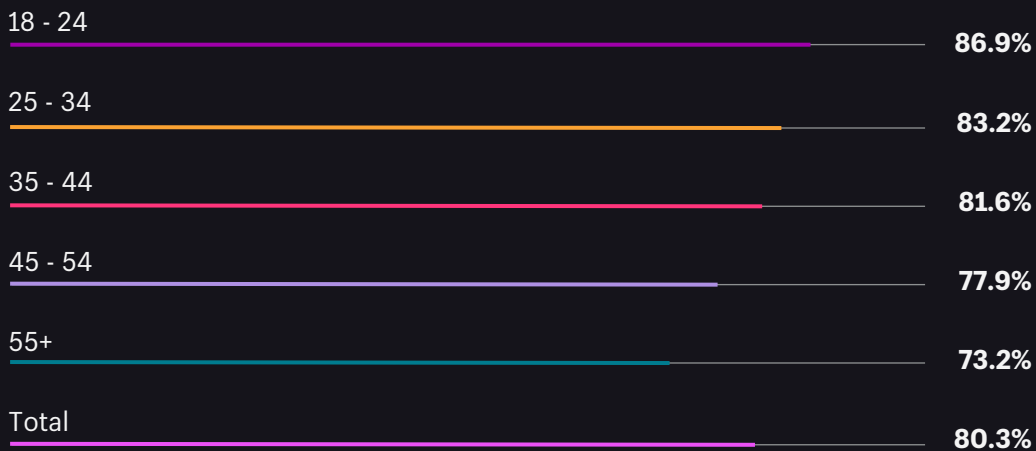
US digital shoppers who have had second thoughts about buying something they added to their shopping cart impulsively

% of respondents, by demographic, Nov 2018

Gender

| Female | 80.9% |
| Male | 79.6% |

Age

18 - 24	86.9%
25 - 34	83.2%
35 - 44	81.6%
45 - 54	77.9%
55+	73.2%
Total	80.3%

2020 12-pointholiday checklist

Source: Forter, "Shopping Cart Second Thoughts" conducted by OnePoll, Nov 16, 2018

6. Prepare your customer support team

Be prepared for an increase in volume and demand on your customer service team overthe holidays.

Do you need to add extra staff to manage customer inquiries over this time? Set customers' expectations by being transparent about response wait times on your website.

Think about what online channels you want your customer support team to support your customers on:

- Live chat
  - This provides on-page interactions and gives customers real-time customer service. Popular live chat apps include:
    - Gorgias
    - Zendesk Chat
    - Facebook Messenger Live Chat
- Social Media accounts for business
  - Twitter, Facebook, and Instagram should be treated like support channels so it's important to offer timely and personable responses to customer inquiries coming in through these mediums. If adding staff to support these isn't feasible, you might consider using an automated response app to help address common FAQs over live chat.

7. Update self-serve support docs

Ensure that your FAQ page and any other customer-facing support documentation like your return/exchange policy, expected shipping and delivery times, customer support contact information, and chatbot responses have been updated to reflect any changes to your store policies over the holiday sales period.

Having key information easily accessible to shoppers will help reduce the volume to your support team and allow them to focus on addressing other customer inquiries faster.

8. Setup Analytics and campaign tracking

Decide on the Key Performance Indicators (KPIs) you want to track. If your business went through BFCM last year, use your data from last year's sales to set benchmarks that you're aiming to reach this year.

KPIs:

• The number of new email subscribers acquired over your sale

• Revenue Per Visitor (RPV): Calculation = total sales / total sessions (Find the numbers to calculate your RPV in your store admin under Analytics -> Dashboards)

• Conversion Rate: Calculation = number of orders / total sessions

• Average Order Value (AOV): Calculation = total sales/number of orders

• Customer Lifetime Value (CLTV): Knowing your CLTV will help you gauge the quality of your sales customers.

9. Build suspense and buzz around your upcoming sale

In the months leading up to the holidays, you'll want to spend time creating compelling content that's valuable to your customers. Non-sales focused content like explainer videos, blog posts, ebooks, and webinars will help create brand awareness leading up to BFCM.

Most consumers want to buy from brands they already know and trust, so getting on their radar before the holidays will be key to being successful. To cut through the noise, think carefully about the content you create:

• Use rich video and photography wherever possible to make sure you stand out

• Have a clear **Call To Action** in your content to get email sign-ups so you can continue to remarket to your growing audience

For some ideas on what kind of content to create, take a look at this blog post on The Future of Video Content.

10. Find ways to reward loyal customers

The holiday season is a great time to give back. Loyalty and rewards programs are the perfect way to show appreciation to customers who love your brand. Loyalty programs, if done well, have been proven to increase repeat business and create a community for your brand. Make sure that you're offering your customers perks they want by offering a combination of free gifts, exclusive discounts, members-only product releases, and points for product redemptions. You can use apps like, LoyaltyLion, Smile.io, or Swell to create your loyalty program.

If you already have a loyalty program in place, create a holiday-themed offer like bonus points, a holiday gift, or early access to any discounts or new products you have planned. Making your existing customers feel special will keep them loyal throughout the holidays and into the new year.

11. Offer easy and hassle-free returns

Do you want to offer free returns to customers? Implement an automated Returns Management Solution app to help ensure that you are equipped to handle higher return volumes seamlessly. These app solutions support self serve returns, product exchanges as well as issuing a store credit.

2020 12-pointholiday checklist
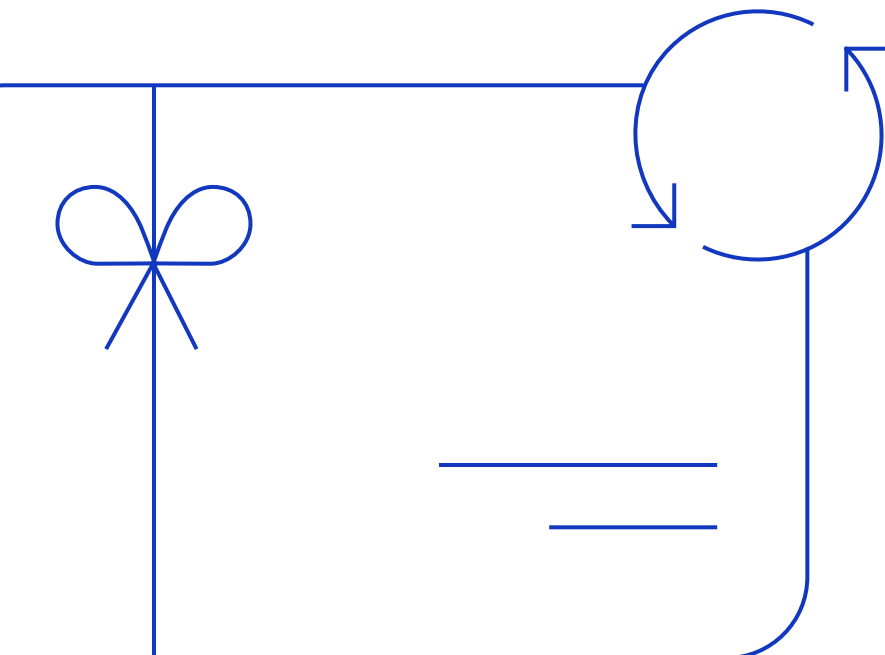
12. Turn seasonal shoppers into year-round customers

Schedule a targeted marketing campaign following your sale to all new email signups or first-time purchasers offering a discount code for a subsequent purchase. Make sure to set the discount so that it's redeemable **after the sale date** to encourage shoppers to return and purchase regularly-priced inventory.

Another way to help encourage return visits to your site is by offering a free gift card with purchase, redeemable only at a later date. You can add gift cards to purchases over a certain amount, or purchases of a specific product using a Buy X Get Y discount code or automatic discount. To set this up:

- Create a gift card product with at least one amount you want to offer as part of this promotion—if you want to offer a free $25 gift card, make sure you have a variant that costs $25.

- Set up a new discount code or automatic discount, and select Buy X Get Y as the discount type.

- Have your discount set up so that it applies when a customer buys either a minimum amount of a specific product, or a minimum purchase amount, and that they get the gift card you're offering for free.

- Make sure to let your customers know that to redeem the offer, they'll need to add the gift card to their cart manually, and they'll get the discount during checkout.

Important: Make sure to consider if you want to limit the number of times your discount can be used since you'll need to honor the gift cards in the future.

Preparation, planning, and starting earlier rather than later are the keys to a successful Holiday season in commerce. This course should cover most of what you need to know for this year's upcoming sale events. Hopefully, it puts you in a better position to be prepared and succeed this holiday season – no matter what comes your way!

Want to learn more? Check out our full 2020 Holiday prep course