



The 2023 Holiday Quarter Handbook

How to get ready for holiday shoppers from Black Friday to New Year's

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Introduction

We're nearing the end of 2023 and the holidays are on everyone's mind. This time of year is like the Superbowl for retailers. In fact, [Statista](#) reports that 25–34% of retailers' yearly sales happen in November and December, which makes the hectic holiday season a major focus for retail stores across the country.

Holiday sales, BOGOs, and other special events are to be expected post-Halloween, and in recent years, most of these sales also take place online.

So, how can retailers prepare for an onslaught of holiday shoppers and make the most of the holiday shopping season?

In this handbook, we'll cover BFCM (a popular acronym this year), shopping trends to keep in mind for the 2023 holiday season, and how Clientbook can help you draw customers in during the holiday rush.

More of a visual learner?

Watch our video for a quick summary of the future retail trends to expect

[Watch the Video](#)

Breaking down the holiday lingo

Before we dive in, let's straighten out a few popular acronyms that are popular this time of year. As a retailer, you're likely already familiar with many of these. It's important to stay in the know so you can use the terms your competitors might be using—and ones today's consumers recognize.



BFCM is the big one—it stands for "Black Friday, Cyber Monday." It's a popular retail term used to refer to the day after Thanksgiving (Black Friday) and the following Monday (Cyber Monday) in the United States.

These days are known for being the biggest shopping days with the biggest sales of the year and are full of deep discounts offered by retailers both in physical stores and online stores.

These BFCM sales mark the beginning of the holiday shopping season. It has become a time when many people shop for holiday gifts and take advantage of deals and promotions to find the perfect gifts.



BOPIS stands for "buy online, pick up in store." It's the perfect combination of online shopping and in-store shopping (no delivery fees!) and saves time during the holiday rush for shoppers who want to avoid the crowds.

BOPIS services peaked during the height of the pandemic. Fewer people were shopping in person and needed the option to pick up their products rather than do the shopping themselves.

Now, with BOPIS, brick-and-mortar stores can continue functioning while giving consumers the convenience that they crave—especially during the holiday season when shoppers are looking to skip long lines.

SMS

If you're looking for new ways to communicate with your customers this holiday season, **SMS**, or short messaging service, is a great way to do it. SMS is just a more technical way of saying texting. If you're sending a text message from one device to another, that's SMS.

[Texting your customers](#) allows you to send [mass messages](#) to your entire client base, or send personalized messages to individual customers. The best part is, text messages are instant, casual, and have far higher open rates than emails.

WOM

WOM, or word of mouth, is a critical part of building awareness around your brand. Today's consumers are growing more [distrustful](#) of businesses and brands as a whole, so they put more stock in what their friends and family recommend.

That's why fostering [strong customer relationships](#) and building a diverse client base before the holiday season is so important. The more people who are in love with your brand and products, the more WOM marketing you'll earn, driving new shoppers to your store during the most important time of the year.

ROPO

ROPO, also known as "webrooming", stands for research online, purchase offline. If you're familiar with [showrooming](#), where buyers look at items in-store and then leave to purchase them online, this is the exact opposite.

With ROPO, shoppers will look around online to research the products they're interested in, read up on reviews, and explore their options. After they've made a decision, they'll head to a brick-and-mortar retailer to buy their selected product in a local store.

This buying behavior emphasizes the importance of having a solid social media presence—even if you're not an ecommerce retailer selling your products online. Having high quality photos, solid [online reviews](#), and information about your store and products is critical during the holiday season.



If you're looking to tap into the high spending Gen Z cohort, you're likely targeting a few "Carlys." A **CARLY**, which stands for "Can't afford real life yet" describes a cohort of Gen Zers who are under the age of 25 and aren't spending their own money yet.

A CARLY is seen as the opposite of a **HENRY** (High earner, not rich yet) which describes Millennials who make between \$100–250k, but don't feel wealthy due to inflation, high cost of living, or a lack of luxury items.

But don't count out Carlys just because they don't have high-earning jobs. Even though Carlys don't have their own money to spend, they're spending their parents' or other earners' money in their lives to support their trendy lifestyle—and to shop for their friends during the holiday season.

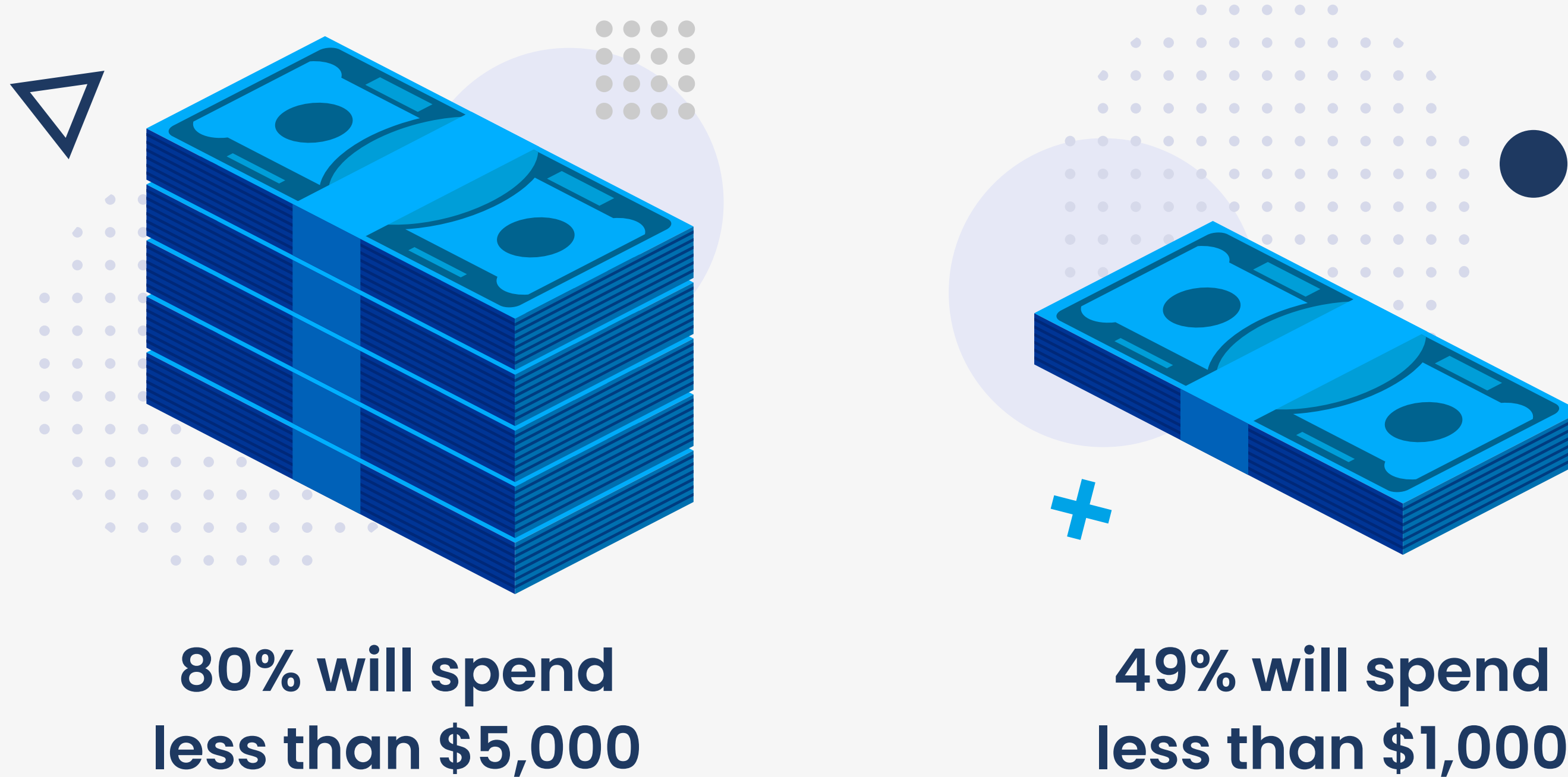
Shopping trends to expect for the 2023 holiday season

Assessing evolving sales trends and responding to them in order to attract potential customers is vital during the busy holiday season. Competition is high and if you want to achieve [customer retention](#), you need to give the people [what they want](#).

We've compiled a list of shopping [trends](#) predicted for 2023 holiday season purchases so that you can prepare and meet the needs of your loyal customers and potential buyers.

Lower consumer budgets

[Celigo](#) has reported that [consumer spending](#) will be tempered by budgets this year. Almost 80% of shoppers said they plan to spend less than \$5,000 this holiday season, and 49% said they're hoping to spend less than \$1,000.

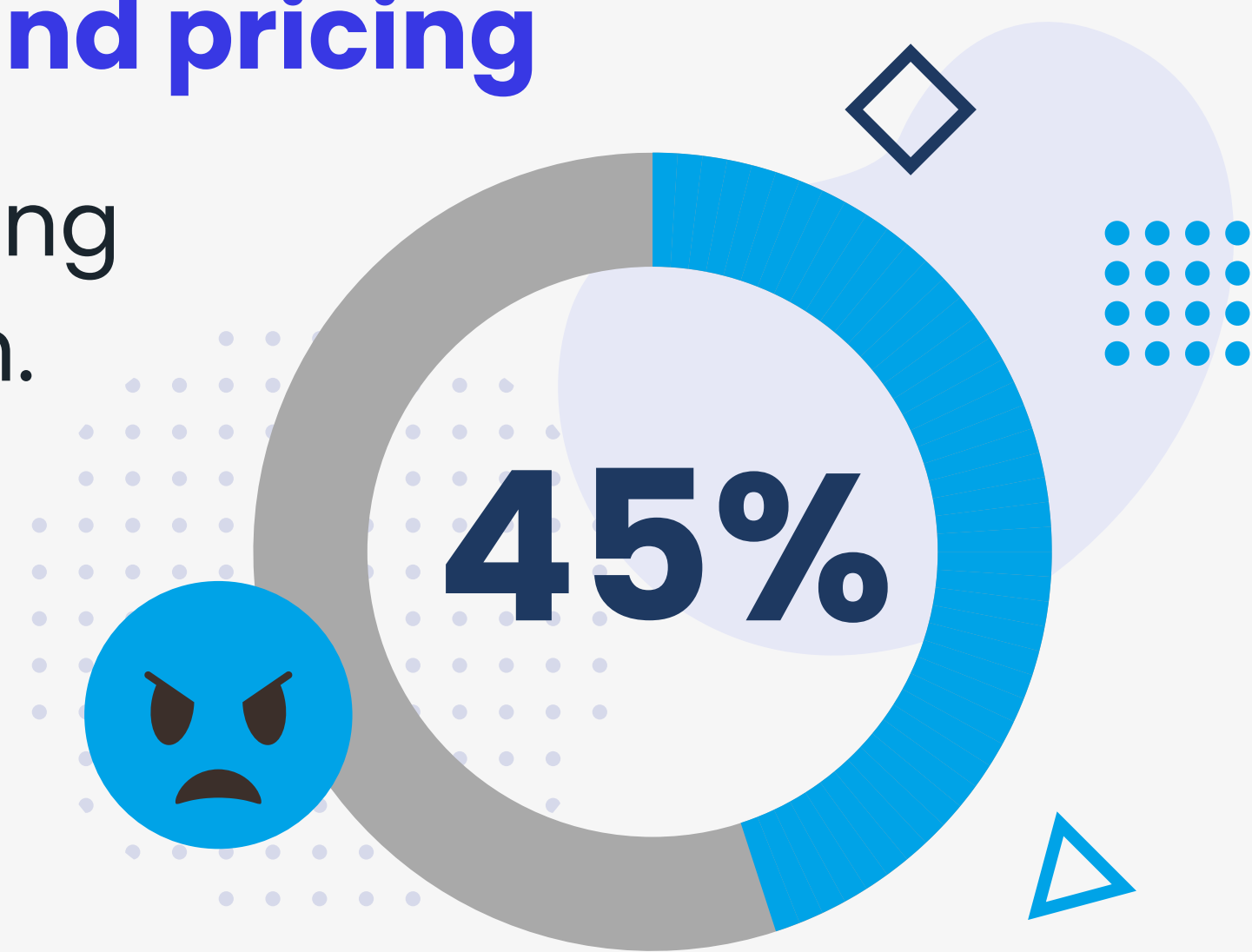


So what does this mean for retailers? It means that you should be adjusting your [marketing strategy](#) for those who are doing their shopping on a budget during BFCM. Offer a wide range of products at different price points so that you have something for everyone.

Heavy discounts and flash sales during Black Friday's sale weekend and Cyber Monday will help you make more sales and grow your [customer base](#).

Demand for streamlined inventory and pricing

Retailers should avoid stock level and pricing issues at all costs this busy holiday season. 45% of survey respondents from Celigo's [holiday trends report](#) say that they were most frustrated by increased costs for in-demand products and limited stock.



High demand and high prices with low seasonal inventory is not a great recipe for success. Prepare for the holiday sales rush in the fall months by creating a demand forecast and [tracking your retail data](#) ahead of time.

Convenient shopping experiences are critical

Whether your retail store is offering online sales or in-person sales, you'll have a successful fourth quarter when you prioritize a convenient shopping experience for your customers.

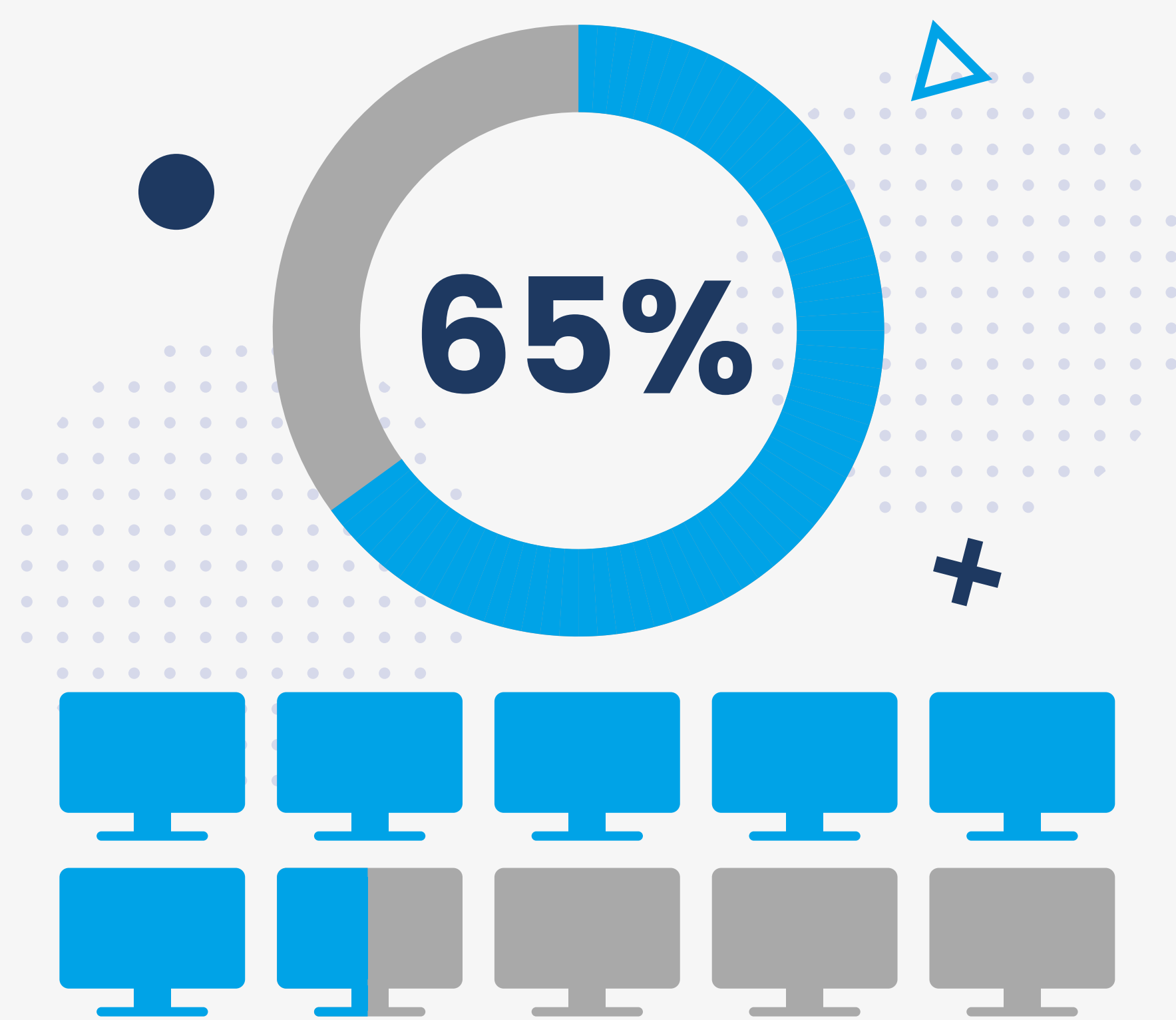
Many shoppers are embracing early-bird holiday shopping to avoid the rush and crowds—this means that retailers need to be thinking ahead and offering pre-holiday special offers and discounts.

Buyers are looking for quick, convenient, accessible ways to do their holiday shopping this year, so make the [customer journey](#) an enjoyable one by focusing on a positive shopping experience for each of your buyers.

E-commerce dominance

Speaking of convenience, E-commerce sales and online shopping are the preferred customer experience these days.

According to the [holiday trend report](#), 65% of consumers will do all of their holiday shopping [online](#).



However, if you're solely a brick-and-mortar retailer, don't lose hope. Many products, especially in the luxury space, need to be touched, seen, and experienced in person before a customer is ready to buy.

The rise of omnichannel shopping

Consumers appreciate [omnichannel retail](#) options like BOPIS, and curbside pickup. Retailers are expected to continue offering these convenient choices for their loyal shoppers.

This is especially important during the holiday season when buyers want to avoid long lines and busy stores. Omnichannel shopping is an ideal way to offer convenience while still getting customers out to your store. If you're lucky, they may even grab an additional item that catches their eye while coming in to pick up their original purchase.

Growth in influencer marketing

Influencers are expected to play a significant role in promoting products and driving sales during BFCM on their social media channels. [Brand advocates](#) have the power to drive significant sales for retailers by sharing their favorite products to a wide audience.

And remember—you don't need a famous TikTok star or YouTube celebrity to benefit from influencer marketing. Your regular, everyday customers play a huge role in WOM advertising as they share your brand with their friends and family.

How Clientbook can help retailers get more customers in the door during the holiday season

Clientbook is a [customer relationship management](#) (CRM) and [clienteling](#) software designed to help retailers enhance their relationships with customers and drive sales.

During the holiday season, when competition is high and [customer engagement](#) is critical, Clientbook is a valuable tool to attract more customers to [physical stores](#) and avoid [showrooming](#). Here's how Clientbook can help retailers achieve this:

Personalized experience

Clientbook allows retailers to track customer [preferences](#), purchase history, and contact information.

Retail staff can use this data to send personalized offers, [messages](#), and [recommendations](#) to individual customers. This personal touch can entice customers to visit the store.

Targeted promotions

Clientbook enables retailers to create and send targeted promotions to customers based on their preferences and shopping behaviors. For the holiday season, you can offer exclusive discounts, early access to sales, or personalized gift recommendations to incentivize store visits.

What's more, with Clientbook's relationship-based targeting, you can help your customers by giving them the perfect gift recommendations for their family and friends.

Clienteling tools

Clientbook provides sales associates with tools to track and manage customer interactions.

Associates can use the platform to take notes, set reminders, and follow up with customers through [messaging](#), creating a more engaging and personalized shopping experience. Clientbook even offers message templates and ChatGPT assistance to give your sales associates a head start.

Data analytics

Clientbook collects and analyzes [data](#) on customer interactions, helping retailers identify [trends](#) and opportunities. Retailers can use this data to fine-tune their holiday season strategies and make data-driven decisions.

**See why thousands of retailers
use Clientbook nationwide**

**Book a demo to see our
software in action**

Book a Demo

Conclusion

Overall, Clientbook can help retailers level up their [customer relationships](#), provide a more personalized shopping experience, and drive foot traffic to physical stores during the holiday season.

To begin preparing for the holiday season with Clientbook for optimization, personalization, and organization, [book a demo](#) with one of our product experts today!

About Clientbook

Clientbook is a platform and mobile app that facilitates easy clienteling by retail sales associates. By using Clientbook, retailers gain visibility and control over the customer experience, resulting in more store visits, better sales conversion rates, and higher sales. Clientbook also drives relationship building by keeping track of the details in a client's life so that the sales associate can focus on the relationship and give the guidance clients want. To learn more, visit clientbook.com.