Holiday Pre-Game:

Key Focuses for August and September to Ensure a Smooth Q4
The Industry’s Leading Customer Engagement Platform
Listrak delivers results.
General Planning & the Listrak Platform

1. Check email list settings like sender name, bounce, and domain settings.

2. Check, adjust, or remove frequency cap on Email and SMS lists.

3. Audit Listrak users to ensure ONLY active employees and third parties have access.

4. Audit your lists and reorganize (or delete) outdated, unused lists.

5. Update List Review group to match new team members.

6. Discuss code freeze for major site updates/data changes with internal teams.

7. Check global recipes on product recommendations.
   - Has your list of suppressed products changed? Increase in-stock quantity, are there new product categories that should be suppressed?

8. Temporarily increase minimum threshold on low inventory and back in stock alerts.

9. Remove or reduce wait steps at end of Conversations/Journey Hub journeys to allow contacts to re-enter sooner.

10. Create shared document for your team that includes key contacts and support info for all third-party vendors/systems.

11. Create and share HTML email unsubscribe form that can be used by internal customer service team(s).

12. Ensure person on your team responsible for daily/weekly analytics reporting has documented when/where/how to pull data.
Website Prep

- Update/publish holiday shipping calendar, including delivery messaging/cut-offs.
- Test subscription capture points
  (confirm that users get subscribed, receive welcome message, etc.).
- Update generic promo Terms & Conditions
  (e.g., any new brands that need to be excluded?).
- Update “Store Locator” page locations, holiday hours, etc. *(if applicable).*
- Check/test email preference center *(if applicable).*
Finalizing Your 2023 Q4 Promo Calendar

- Audit 2022 performance and learnings.
- Analyze and document results of A/B testing done Jan-July to influence Q4 approach.
- Account for all new product launches, seasonal products, holidays.
- Identify key sales/promos from 2022 you’ll need to compare.
- Determine what special audiences may be required (e.g., people who bought category, brand, particular SKUs).
- Build out new subscription points/entry events to support special Q4 collaborations, sweepstakes, or promotions.
- Aim to send something every day.
- Save promo calendar in a format that can be easily viewed, updated, and shared by your entire team.
- Keep it simple.
  - Consumers have to navigate hundreds of retailers aiming to get their attention during the holidays.
Review and Update Creative Assets

- Analyze and document results of A/B testing done Jan-July to influence Q4 approach.
- Initiate template updates/changes (*discuss with creative teams*).
- Create Saved content for most repurposed elements
  (e.g. holiday categories, customer service information, holiday shipping/pick-up procedures).
- Audit Coupon Pools
  - Unique coupon pools: Check that they’re full enough to get into January 2024
  - Static coupon pools: Check they’re built out through January 2024
  - If not in place, create and add Backup Coupon codes
- Coupon Alerts
  - Increase alert threshold to 20k.
  - Ensure coupon alerts are going to correct team members.
- Create and share Q4 creative assets with agencies and third parties as far in advance as possible (*30-60 days is ideal*).
List Prep & Hygiene

- Opening sends to your full list starting in November or on Black Friday is not recommended.

- Start Listrak Reactivate or recurring/drip campaigns in late Summer/Early Fall (before Oct 1st).

- Adjust Q4 audience filters to account for reactivation campaigns.

- Decide what to do with disengaged subscribers/dead weight.
Advertising & Retargeting

- Discuss paid, social, and retargeting strategy for Q4 (internal or with external vendors).
- Define any special audiences that may be required.
- Audit Exchange audiences (delete/remove audiences no longer needed/used).