

Holiday Success Checklist

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On the first day of Christmas.....

The holidays are right around the corner and our success is tied to how well we planned the entire year leading up to these hectic weeks. Regardless of how you reach your customers, having a planning checklist will help to ensure your company is prepared for the unexpected situation that might arise and will have the processes in place to satisfy your customers.

Below are some suggestions grouped by department or area who would be the source of the actions! These processes should be in place, year round but on “heightened alert” for your busy season.

Merchandising

By now product has been ordered and on its way to your stores, warehouse, etc.

- Be sure you are following up with ex-factory dates rather than in warehouse dates on orders. This way if shipping time is extensive, you have options to expedite from your supplier and at his cost if the order was written as ex-factory. If you wait until the due date at the warehouse to follow up, it may be too late to route the product faster.
- Be sure you have product availability, especially in your key price points
- Look and plan for alternative items – what items can be offered if the customer first choice is sold out. Have those lists reviewed, updated and ready to go. Discuss them with all relevant areas (merchandising, inventory control, web marketing, telemarketing, DC, etc.)
- Have meetings with operations in advance to discuss problems from prior years (have they been addressed?) and discuss potential issues
- Communicating – let’s not forget about suppliers – work with them – review your strategies, projections, etc. — make them part of the team
- PLAN, PLAN, PLAN and COMMUNICATE

Merchandising/Inventory Control

- Coordinate overall company forecasts with marketing and finance
- Review item forecasts and coverage plans for the season/horizon
- Provide the Distribution Center (DC) with SKU forecasts in advance
- Establish PO Cancellation “trigger” dates for orders ex suppliers (domestic/import); or dates for possible expediting
- Constant review of PO shipment status
 - Set guidelines for expedited shipments (when, dollar cut-offs, authorizations, etc.)

- Maintain correct PO/BO dates in system for customer information
- Select alternate item suggestions for potential Not Avail (or large BO items)
- If you have retail or outlet stores, review on hand to possibly support mail order/internet sales for BO and NA (not available)
- Provide your call center/web manager items for alternate selling (keep list updated by category)
- Provide updates of Top 20 Backorders, providing accurate delivery information (at least weekly perhaps more often). Manually updated each week, if not systemically available. Customer orders can be saved if the dates are accurate.
- Provide DC a daily priorities of “hot shipments”, e.g. backorders, etc. for expedited processing upon receipt.

Quality Control

- Be sure additional staffing (or additional shifts) are arranged in advance to handle the influx of shipments
- Pre-arrange any additional field inspections domestic & import (if possible)
- Insure swatch cards, specs, etc. are available in DC (Don't forget about your retail operation, if merchandise is shipped direct to stores)
- Advise QC of known tolerances on product standards (especially apparel) prior to arrival
- Identify “decision-making” issues allowed by DC so as not to delay processing while waiting for an answer.
- Limit merchandise prep issues (re-bags, internal labeling, etc.) upon delivery
- Highlight new vendors (e.g. that may be potential problems or need special review)
- Production/Merchandising should have a dialog with these suppliers re-iterating your requirements/standards

Receiving

- Additional staffing for peak weeks (additional shifts)
- Insure warehouse/DC hours available for delivery (Saturday delivery from carriers/suppliers if necessary, etc.)
- Establish DC responsibilities & contact persons for both DC and corporate office
- Corporate representation in the DC during peak weeks (to assist with PO problems, this person would know who to contact to expedite answers, and make decisions, etc.)

Technology

- IT should be prepared for any processing issues (peak capacity, etc.)
- System capacity for large backorder releases, should it be necessary

- BO notice to customers (system's ability to extract customers holding late BO, wording of letter & procedures – Notification schedules for email, first class, postcard, etc. must be resolved prior to the “needed date”).

Marketing

- Dates should have been established and posted on the web, in catalogs, stores, etc. for last order dates and ship dates for delivery by Christmas. Any additional customer costs should also be noted.
- Departments should be cognizant that backorders may be expedited at company expense which impacts bottom line.
- Have pre-arranged any Holiday Gift Box/Wrap status e.g. is it in stock, and to your brands' quality?

Miscellaneous:

- Ensure external carrier (FedEx, Post Office, etc.) capability for Xmas eve
- Set up Weekly/Daily conference calls with “Point person”/DC “keep communication lines open as to problems, needs, etc. Inventory Managers/Directors should be that “point” person – with a counterpart in DC. If you don't have this in place – establish this!!!
- Designate someone to provide to Quality Control/Receiving:
- A list of Purchase Orders due between Nov. 1 & Christmas (especially note PO's due – close to cut-off date)
- Warehouse receipts flow projections of units (per week) so DC can staff to peaks

Summary:

- PLAN EARLY – Begin soliciting suggestions, potential problems, etc. and begin mapping out strategies particular to your respective business.
- Establish a high degree of COMMUNICATION and COORDINATION between all areas of the company.
- Designate a “point person” to be the “command central” of communication (someone who is quick on their feet and has the authority to make a decision on the spot).
- Highlight items that may have been problems in prior years (learn from mistakes)

May you all have a successful and profitable holiday season!

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