

HOLIDAY CHECKLIST

Holiday Cards

- ☐ Decide if you are sending holiday cards this year.
- ☐ Decide if the cards will be printed, emailed, or both.
- ☐ Decide what groups of people will receive the cards (clients, employees, vendors, colleagues, etc.).
- ☐ Decide what your budget is, and what adjustments to the recipient list, design or format you're prepared to make to come in within budget.
- ☐ Pull the contact information for those people and format it into an Excel sheet.
 - ☐ For e-cards, you will want a separate column for each of:
 - ☐ First Name
 - ☐ Last Name
 - ☐ Email Address
 - ☐ For printed cards, you will need a separate column for each of:
 - ☐ First Name
 - ☐ Last Name
 - ☐ Address
 - ☐ City
 - ☐ State
 - ☐ ZIP
 - ☐ Country (if sending outside the US)
- ☐ Design the card.
- ☐ For printed cards, submit the card to the printer along with the final recipient count so you can get a price quote and a delivery timeline. The printer will tell you when they need the final address list.
- ☐ For e-cards, upload the design and contact list to an email newsletter distribution service like MailChimp or Constant Contact (do not use Outlook or Gmail).
- ☐ Decide how returned mail will be tracked so you can update your contact list as returns come in.

HOLIDAY CHECKLIST

Holiday Cards—Timeline

By October 6: Decide if you're doing cards, what format, what your budget is, and what categories of people are getting them.

By November 3: Finalize recipient list. Circulate design draft for review.

By November 17: Submit final design to printer.

December 11: Target mailing date.

HOLIDAY CHECKLIST

Holiday Party

- ☐ Decide if you are having a holiday party.
- ☐ Decide who the party is for: employees, clients, friends, family, etc.
- ☐ Decide on a budget.
- ☐ Decide how many guests you would like to have, which may need to change based on your budget and costs.
- ☐ Pick the venue, then pick the date according to what they have available.
- ☐ Are you serving food? Alcohol? From where? Do you need servers or bartenders?
- ☐ How will you collect and deal with guests' dietary restrictions?
- ☐ Revise the guest numbers if needed.
- ☐ Is the venue providing decorations, or do you need to do that?
- ☐ Are you having entertainment? Book them early.
- ☐ Do you need security, or does the venue require it?
- ☐ Especially if you're serving alcohol, do you need to offer drivers or a car service to guests?
- ☐ Create the guest list.
- ☐ Decide how you are inviting guests. Email invitations (like Paperless Post) followed up with a phone call have become the preferred method to insure your guests receive the invitation in time and provide an RSVP.
- ☐ If the dress code, make sure you note it.
- ☐ Send the invitation 4-6 weeks ahead of the date.

HOLIDAY CHECKLIST

Holiday Party—Timeline

By October 6: Decide if you're having a party, the groups of people you're inviting, the budget, the venue, and the food and drink.

By October 20: Decide on the final guest list.

By November 3: Send invitations (if you're doing printed and mailed).

By November 10: Send invitations (if by email).

HOLIDAY CHECKLIST

Client Gifts

- ☐ Decide if you are purchasing gifts for clients.
- ☐ Set a budget.
- ☐ Decide which clients make the cut, and whether everyone gets the same thing or whether the gifts are tiered based on dollar value of the client.
- ☐ Decide if everyone is getting the same thing, something they can customize or select themselves, or unique gifts for each person.
- ☐ Select the gifts.
- ☐ Ensure you have correct delivery addresses for each recipient and that someone will be there to accept the gift.
- ☐ Order gifts and collect tracking numbers.
- ☐ If they're coming to the office for future distribution, make sure you have a place to store them.

HOLIDAY CHECKLIST

Employee Gifts

- ☐ Decide if you are purchasing gifts for employees.
- ☐ Set a budget.
- ☐ Decide if everyone is getting the same thing, something they can customize or select themselves, or unique gifts for each person.
- ☐ Select the gifts.
- ☐ Decide where and how they will be distributed: sent to each person's home, given out at the holiday party, etc.
- ☐ Order gifts and collect tracking numbers.
- ☐ If they're coming to the office for future distribution, make sure you have a place to store them.