



Busy Season Checklist



Use this checklist to see what's ready, what still needs attention and what to tackle before the busiest weeks begin.

Work through it at your own pace and focus first on the areas that will make the biggest difference for your business.



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1. Team & Capacity

- ☐ Confirm holiday availability, requested time off and any extra hours
- ☐ Adjust staff schedules and make sure front desk coverage is in place
- ☐ Review remaining appointment capacity
- ☐ Plan a team meeting before busy season
- ☐ Make sure the team understands seasonal priorities
- ☐ Plan for team support during the busiest weeks, including breaks, food and coverage



2. Retail & Inventory

- ☐ Confirm seasonal inventory has arrived
- ☐ Review last year's holiday sell-through to help guide stock decisions
- ☐ Set up seasonal retail and gifting displays
- ☐ Prepare gift wrapping and gifting supplies
- ☐ Decide which retail bundles or products you want to feature
- ☐ Identify anything that needs to be reordered before the rush



3. Offers & Promotions

- ☐ Decide which seasonal offers or promotions you want to run
- ☐ Check the calendar before creating additional demand
- ☐ Confirm the start and end dates for each offer

- ☐ Confirm who each offer is intended for
- ☐ Set up promo codes, discount rules or targeting in Phorest where relevant
- ☐ Review packages or special offers and make sure the setup matches what you're promoting
- ☐ Make sure the team understands the offers and how they work

4. Gift Cards



- ☐ Confirm Gift Cards are easy to purchase
- ☐ Check your online Gift Card setup
- ☐ Restock physical Gift Card supplies
- ☐ Confirm envelopes, bags, tissue paper and other gifting supplies are ready
- ☐ Decide when and how Gift Cards will be promoted
- ☐ Make sure the team knows what to say about Gift Cards

5. Email & SMS



- ☐ Prepare your holiday email campaigns
- ☐ Prepare the SMS messages you know you'll need
- ☐ Confirm the audience and timing for each communication
- ☐ Schedule campaigns ahead of the busiest weeks
- ☐ Prepare a message for last-minute appointment gaps
- ☐ Prepare Gift Card messaging



6. Client Experience

- ☐ Confirm PhorestTips is set up where relevant
- ☐ Prepare for increased front desk volume
- ☐ Make sure clients can easily understand any seasonal offers or changes
- ☐ Think through how you'll keep the experience personal when things get busy



7. Once Busy Season Is Underway

- ☐ Watch for appointment gaps
- ☐ Keep Gift Cards and gifting visible
- ☐ Use SMS for timely opportunities where appropriate
- ☐ Keep an eye on which offers and communications are working
- ☐ Make small adjustments instead of rebuilding the whole plan
- ☐ Make sure your January messaging is ready before December ends



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