Busy Season Checklist

A practical operational guide for salon, spa, and clinic owners to prepare for the festive rush.

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1. Staff & Team Wellness

- [ ] **Finalise rosters early**
  Schedule and lock in all staff breaks and time-off requests in advance.
- [ ] **Arrange recurring snack deliveries**
  Keep the team energised and limit fatigue.
- [ ] **Brief team on Cheat Sheet AI**
  Ensure all staff are fully trained on the Phorest cheat sheet for continual client care.



2. Strategy & Performance Tracking

- [ ] **Set business targets**
  Define seasonal goals and translate them into actionable team and individual KPIs.
- [ ] **Align the team**
  Communicate goals clearly in 1-1s and meetings so everyone stays focused on business priorities.
- [ ] **Enable insight alerts**
  Configure automated notifications for when you fall under target or reach performance milestones.



3. Operations & Client Communication

- [ ] **Update answerphone messages and your WhatsApp number**
  Refresh out-of-office and voicemail recordings with seasonal operating hours, as well as redirection to online booking.
- [ ] **Adjust deposits**
  Increase online and in-house deposit amounts to minimise last-minute no-shows and late cancellations.
- [ ] **Use Payment Links**
  For In house deposits and consider using the auto cancel function for non paid deposits.
- [ ] **Review cancellation disclaimers**
  Verify that online booking disclaimers state your cancellation policy clearly.
- [ ] **Update online banners**
  Add key announcements to your online banner.

- [ ] **Audit client notifications**
  Ensure automated SMS/emails explicitly outline late cancellation and missed appointment rules. Also ensure your Client notifications are set to send via Whatsapp if you have this set up, HERE is a guide.

- [ ] **Enable automated rebooking prompts**
  Send automated reminders to guests who depart without scheduling their next visit.

- [ ] **Online booking slots**
  Consider limiting new client online bookings to team members with higher availability.

- [ ] **Customise service settings**
  Set bespoke deposit amounts for high-demand or high duration services.

- [ ] **Expand AI Front Desk responses**
  Add custom automated replies for frequent seasonal inquiries to save time.

- [ ] **If Using Whatsapp**
  Keep your team updated with the templates available on Chat and assign responsibilities to ensure Front Desk AI handoffs are dealt with promptly

- [ ] **Set up pre- and aftercare forms**
  Automate pre- and post-treatment forms dispatch upon booking to ensure up-to-date client care instructions and reduce service turnaways.

4. Inventory & Retail Stock



- [ ] **Rotate festive displays**
  Refresh retail product placement regularly to maintain customer interest.

- [ ] **Analyse past stock reports**
  Review historical holiday data to optimise order quantities and prevent last minute costly orders.

- [ ] **Activate low-stock alerts**
  Set up threshold alerts for essential retail and professional items.

- [ ] **Track product waste**
  Monitor and log daily stock usage to minimise wastage during high-volume periods.

5. Promote



- [ ] **Allocate marketing budget**
  Reserve dedicated funds for late-stage promotional efforts, including festive holiday greetings sent to your entire client database.

- [ ] Schedule gift card offers
  Set clear activation and deactivation dates for seasonal gift card incentives, discounts, or added-value packages.

- [ ] Optimise online store inventory
  Feature seasonal items and surplus retail prominently on your online store to accelerate movement.

- [ ] Enable expert recommendations
  Train staff on delivering personalised client product suggestions.

- [ ] Configure checkout hotkeys
  Add fast-selling retail products to front desk hotkeys to streamline checkout during busy periods.

- [ ] Link high-margin add-ons
  Attach express, high-profit add-on services to core offerings to boost average ticket value.

- [ ] Promote short-term Courses
  Introduce brief treatment courses to secure rebookings and drive client retention into January and February.

- [ ] Schedule all campaigns
  Keep your downtime as free as possible.

6. Client Retention & Staff Rewards

- [ ] Configure Staff Tips
  Verify tipping setup and onboard team members to collect payouts straight to their personal bank accounts, highlighting Phorest Vaults to help them save earnings for special purchases.

- [ ] Refresh loyalty incentives
  Audit your loyalty program to incorporate slower-moving treatments or retail stock as New Year client rewards.

- [ ] Boost seasonal staff bonuses
  Offer enhanced commission or team incentives for reaching holiday rebooking milestones.

- [ ] Leverage Client Reconnect
  Send automated SMS messaging, which is included free on Grow, Ultimate, Elite plans, and our Med Spa packages, to re-engage lost clients.

- [ ] Help Clients create their own shareable Wish List
  Email it to them to share with loved ones.


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