



Holiday Checklist for Retail Stores

Everything you need to prepare for
the busiest selling season

System checks

REVIEW YOUR SHOPIFY POS SETTINGS

Update to the [latest version of the Shopify POS app](#) for your iOS devices

Check your connectivity status and charge levels for connected hardware

Add your [most-used actions to the smart grid](#) like local pickup and delivery, buy in-store, ship to home, and loyalty apps

[Customize your receipts](#) to include your return and exchange policies and customer information

OPTIMIZE YOUR ONLINE STORE

Test your online store on [mobile devices](#) to ensure customers can shop everywhere

Check and fine tune your store speed with [Shopify's online store speed report](#)

Display [pickup availability](#) on your online store when offering local pickup so customers can see what's in store

Update store hours across all online channels so customers can plan their visit

Orders and fulfillment

OFFER SHOP AND SHIP

Create [calculated shipping rates](#) to charge fees based on the shopper's shipping destination

Test your [shop and ship](#) flow to process gift orders in store, by phone, and email and ship them directly to recipients

Offer gift wrapping for free or for an additional fee with [custom sale](#)

STREAMLINE YOUR LOCAL PICKUP PROCESS

Set up [local pickup](#) for online orders and manage your orders through Shopify POS

Make sure staff know how to view and [fulfill local pickup orders](#) directly from Shopify POS

[Turn on push notifications](#) to send order updates to customers by email or SMS

Estimate order fulfillment times for local pickup so customers know what to expect when they place their order online

OPTIMIZE YOUR LOCAL DELIVERY PROCESS

Set up [local delivery](#) for online orders and manage orders through Shopify POS

[Download the Shopify Local Delivery App](#) to manage deliveries, optimize delivery routes, and view customer instructions

Make sure staff know how to view and [fulfill local delivery orders](#) directly from Shopify POS

[Turn on push notifications](#) to send order updates to customers by email or SMS

Check your order fulfillment times for local delivery so customers know what to expect

DELIGHT CUSTOMERS WHEN THEY OPEN THEIR ORDERS

Prepare handwritten thank you notes to include in orders

Stock up on gift wrapping supplies to turn orders into special unboxing moments

Products

STOCK INVENTORY FOR INCREASED DEMAND

Place last-minute orders on stock that's running low so you don't face stockouts

Schedule incoming inventory orders to prepare your store and staff for merchandising

Understand which items to bundle or discount with Stocky reports

Ensure in-store inventory is listed online to give customers flexible shopping options

Order and sell gift cards on Shopify POS for last-minute shoppers, that can be used online and in store

Staff

Review and confirm your staff permissions in Shopify POS so staff have access to only the things they need

Ensure new or seasonal staff are up to speed with Shopify POS training videos

Set up product recommendations in Shopify POS so staff can drive additional purchases at checkout

Stock up on health and safety equipment for your staff and shoppers to provide a seamless in-store experience

Brief staff on new promotions, products, and safety protocols

Marketing

ATTRACT IN-STORE SHOPPERS

Print storefront signage so shoppers know what to expect in-store

Put finishing touches on your window displays to feature gift inspiration

Have promotions and sale items clearly visible to attract shoppers

Reward loyal customers with incentives and offers, right through Shopify POS

DRIVE ONLINE TRAFFIC

Make sure all promotions are consistent across online and in store

Test any website banners, pop-ups, links, and offers

Post to social channels regularly to stay top of mind

Host a contest on social channels to increase awareness of your brand

EMAIL YOUR CUSTOMERS TO DRIVE PURCHASES

Send customers the items they looked at in-store with email carts, so they can buy the items online

Send abandoned carts to shoppers who didn't checkout online

Email product recommendations based on customer tags and past purchases

Offer early access to sales, incentives, and special discounts to loyal customers

Share new products through email to drive purchases from your customer base

Customers

Capture new customer information in Shopify POS during checkout to grow your customer base

Add customer tags to easily target customers with relevant product recommendations and offers

Prepare staff to offer product and gift recommendations to drive additional sales in store

Keep gift-wrapping supplies near your checkout counter to wrap shoppers' purchases

Adjust your return and exchange policy for the holidays to allow additional time for shoppers to bring back their orders

Display your hassle-free return and exchange policy so shoppers know what to expect

Performance and reporting

Get familiar with your Shopify POS analytics and admin reporting to track sales performance daily and adjust upcoming strategies based on insights

Track the performance of your online promotions using Google Analytics

Post-holiday

Prepare to take down or adjust any holiday messaging in-store and online

Perform stocktakes in your retail stores to get an accurate account of inventory on-hand and understand which items sold and which didn't

Prepare for more returns and exchanges and be prepared to offer exchange recommendations to limit full returns

Use retargeting campaigns to turn seasonal shoppers into year-round fans with incentives and offers

Ask for feedback from your staff about what went well and what didn't to improve in the new year



Want to set your retail stores up for success post-holidays?
We're here to help, [request information](#)