The Peak Season Readiness Checklist

Practical campaign and fulfilment planning for retail and e-commerce teams



send dm
mail & print specialists

Plan → Create → Confirm → Prepare → Deliver → Learn

Peak season does not start when orders increase.

The work that determines how smoothly your busiest trading period runs happens weeks beforehand.

Customer data needs to be ready. Creative and print need to be scheduled. Stock needs to be available. Fulfilment capacity needs to be understood. Postage needs to be planned. And the journey from the mail piece to the next customer action needs to work.

Use this checklist to see what is ready, what still needs attention and where decisions need to be made before your seasonal campaign goes live.

1. Plan

8+ weeks before your campaign

Start with what you want the campaign to achieve, who you want to reach and what needs to happen if they respond.

Campaign Beginning

- [ ] We have agreed the main campaign objective
- [ ] We know when we want the campaign to reach our audience
- [ ] We have estimated campaign volumes
- [ ] We know what action we want recipients to take
- [ ] Marketing and operations teams understand the campaign plan

Audience and data

- [ ] We know who we want to reach
- [ ] Customer and prospect data has been reviewed
- [ ] Data cleansing and suppression requirements have been identified
- [ ] Audience segments have been agreed
- [ ] Any use of personal data has been considered against applicable GDPR and direct marketing requirements

Fulfilment planning

- [ ] Expected response and order volumes have been considered
- [ ] Stock requirements have been identified
- [ ] Storage requirements are understood
- [ ] Fulfilment capacity has been discussed
- [ ] We have considered what happens if demand is higher than expected

Ask your team: If this campaign performs better than expected, are we ready for the response?

2. **Create**

Around 6 weeks before

Turn the plan into a relevant customer experience and make the next action clear.

Manage and Creative

- [ ] The campaign message is clear
- [ ] The offer or proposition is easy to understand
- [ ] There is a clear call to action
- [ ] Creative reflects the intended audience
- [ ] Any important seasonal deadlines are clearly communicated

Personalisation

- [ ] We have considered whether personalisation will improve relevance
- [ ] Variable Data Printing requirements are confirmed where required
- [ ] Personalised elements are supported by appropriate data
- [ ] Different audience segments receive relevant messages or offers where appropriate

Connect mail to digital

- [ ] We know where we want customers to go next
- [ ] The digital destination supports the message in the mail piece
- [ ] Landing pages provide a clear next step
- [ ] The customer journey works effectively on mobile
- [ ] QR codes or personalised URLs have been considered where appropriate

Ask your team: What exactly do we want someone to do after receiving the mail piece?

3. Confirm

Around 4 weeks before

Bring the moving parts together and confirm the details that affect production, fulfilment and delivery.

Print

- [ ] Creative is approved
- [ ] Final quantities are confirmed
- [ ] Print format and specification are agreed
- [ ] Personalisation requirements have been checked
- [ ] Inserts or additional campaign materials are confirmed

Stock and fulfilment

- [ ] Campaign stock is available or scheduled
- [ ] Pick and pack requirements are confirmed
- [ ] Packaging requirements are agreed
- [ ] Dispatch requirements are understood
- [ ] Inserts and promotional materials will be available when required

Postage

- [ ] Postage has been considered before production
- [ ] Mail format, dimensions and weight have been reviewed
- [ ] Campaign volumes are confirmed
- [ ] Required dispatch dates are agreed
- [ ] Appropriate postage options have been considered

Ask your team: Are there any important decisions we are leaving too late?

4. Prepare

Around 2 weeks before

As the campaign approaches, the focus should move from making major decisions to checking that everything works.

Production and fulfilment

- [ ] Data has passed final checks
- [ ] Print and production schedules are confirmed
- [ ] Stock and campaign materials are where they need to be
- [ ] Fulfilment instructions are clear
- [ ] Dispatch schedules are confirmed

Check the customer journey

- [ ] QR codes have been tested
- [ ] Personalised URLs and campaign links work correctly
- [ ] Landing pages are live and tested
- [ ] Offers and promotional codes work as intended
- [ ] The mobile journey has been checked

Measurement

- [ ] Campaign KPIs have been agreed
- [ ] Tracking is ready before dispatch
- [ ] Website or landing-page activity can be monitored
- [ ] Enquiries, orders or redemptions can be attributed where appropriate

Ask your team: If the campaign landed tomorrow, would everything work?

5. **Deliver**

When your campaign goes live

Once the campaign has launched, keep marketing and operations connected.

Monitor the campaign

- [ ] Dispatch is progressing as planned
- [ ] Customer response is being monitored
- [ ] Website and landing-page activity is being reviewed
- [ ] Enquiries and orders are being monitored
- [ ] Stock levels remain appropriate
- [ ] Fulfilment capacity is keeping pace with demand
- [ ] Operational issues have a clear owner
- [ ] Marketing and fulfilment teams are sharing relevant information

Ask your team: Are we seeing anything that requires action now?

A live campaign creates information.

Use it.

If response is stronger or weaker than expected, or fulfilment pressures begin to appear, make sure the right people know early enough to respond.

6. Learn

After the campaign

Do not move straight on to the next campaign without understanding what happened.

Campaign performance

- [ ] Direct responses have been reviewed
- [ ] Website activity has been reviewed
- [ ] Enquiries, orders and redemptions have been assessed
- [ ] Results have been compared with the original campaign objective
- [ ] QR code and personalised URL activity has been analysed where used

Operational performance

- [ ] Actual volumes have been compared with forecasts
- [ ] Fulfilment performance has been reviewed
- [ ] Stock issues have been identified
- [ ] Production or dispatch pressures have been recorded
- [ ] Lessons have been captured for future campaigns

Ask your team: What should we repeat, change or prepare earlier next time?

The end of one campaign should make the next one easier to plan.

How ready are you for peak season?

Take one final look at your checklist.

Mostly checked?
You have many of the core elements in place.

Focus on final checks, measurement and keeping marketing and fulfilment connected as your campaign moves towards delivery.

Several gaps?
Identify decisions that could affect production, fulfilment, or dispatch, and prioritise those first.

A missing decision early in the process can become a bigger problem as deadlines tighten.

Lots still undecided?
Your campaign may benefit from a more structured planning review before committing to production dates, volumes and delivery requirements.

One final question
What happens if your campaign works better than expected?

It is an easy question to overlook.

A successful campaign can create additional pressure on stock, picking and packing, packaging, customer service and dispatch.

Planning for success means thinking about that response before the campaign lands.

Bring the journey together

At Send DM, our Start to Send approach brings together:

Data → Personalised Print → Direct Mail → Fulfilment → Postage → Client Led Digital Integration

Helping retail and e-commerce teams connect more of the campaign journey through one partner.

Planning for your next peak season?

Book a Peak Planning Review with Send DM.

We can review your data, direct mail, print, fulfilment and postage requirements and help identify what needs to happen next.

Start to Send with Send DM.

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