

# SOP: Seasonal Promotion Planning and Calendar Setup

This SOP details the process of **seasonal promotion planning and calendar setup**, including identifying target seasons, selecting promotional themes and products, scheduling campaign timelines, coordinating cross-functional team activities, setting marketing budgets, and establishing performance metrics. The goal is to ensure a streamlined and effective approach to seasonal marketing efforts that maximize customer engagement and sales outcomes throughout the year.

## 1. Purpose

To establish a standardized process for planning, scheduling, and executing seasonal promotions to drive customer engagement and boost sales.

## 2. Scope

This SOP applies to the Marketing, Sales, Merchandising, and Operations teams involved in the planning and execution of seasonal promotions.

## 3. Responsibilities

- **Marketing:** Lead promotion planning, theme selection, campaign setup, and budget allocation.
- **Sales & Merchandising:** Identify potential products for promotion and forecast inventory needs.
- **Operations:** Ensure readiness for fulfillment, logistics, and customer service.
- **Analytics:** Establish KPIs and monitor performance.

## 4. Definitions

- **Target Seasons:** Defined calendar periods with high promotional potential (e.g., Spring, Summer, Back-to-School, Holidays).
- **KPI:** Key Performance Indicator, a measurable value demonstrating promotion effectiveness.

## 5. Procedure

1. **Identify Target Seasons**
  - Review previous years' sales and customer engagement data.
  - List high-potential seasons and events (e.g., Black Friday, Valentine's Day, Summer, Back-to-School, Christmas).
2. **Select Promotional Themes and Products**
  - Recommend themes aligning with target audience and season.
  - Coordinate with merchandising to choose featured products.
  - Approve product selection with sales and inventory teams.
3. **Schedule Campaign Timelines**
  - Determine pre-launch, launch, and post-launch periods.
  - Create a detailed promotion calendar including creative deadlines, communications plan, and launch dates.
4. **Coordinate Cross-functional Activities**
  - Hold regular kickoff and status meetings with involved teams.
  - Assign owners for creative, digital setup, inventory checks, and logistics.
5. **Set Marketing Budgets**
  - Estimate costs for ads, creatives, promotions, and logistics.
  - Gain approvals as per company policy.
  - Track spend against budget throughout the campaign.
6. **Establish Performance Metrics**
  - Define key KPIs, e.g., sales uplift, conversion rates, website traffic, ROI, new customer acquisition.
  - Set up analytics dashboards for real-time monitoring.
7. **Post-Campaign Review**
  - Analyze outcomes versus targets.
  - Document learnings and share with stakeholders.

## 6. Promotion Planning Calendar Template

Season/Event	Theme	Featured Products	Promotion Dates	Responsible Teams	Budget	KPI Targets
Spring Sale	Refresh & Renew	Home Décor, Garden Tools	Mar 20 - Apr 10	Marketing, Sales	\$15,000	+15% sales, +10% traffic
Back-to-School	Gear Up for Success	Stationery, Backpacks	Jul 25 - Aug 20	Marketing, Merchandising	\$12,000	+20% sales, 500 new signups
Holiday	Season of Giving	Gift Sets, Electronics	Nov 25 - Dec 24	Marketing, Operations	\$25,000	+25% sales, +15% avg. order value

## 7. Document Management

- **Owner:** Marketing Manager
- **Review Cycle:** Annually, or after each major promotion
- **Version Control:** Maintain updated copies with revision dates