

# Standard Operating Procedure (SOP): Retail Promotion Planning and Scheduling

This SOP details the process for **retail promotion planning and scheduling**, covering the strategic development of promotional campaigns, timeline creation, resource allocation, coordination with marketing and sales teams, budgeting, and performance tracking. The objective is to ensure effective and timely execution of retail promotions that maximize customer engagement and sales while maintaining alignment with overall business goals.

## 1. Purpose

To outline the steps and responsibilities involved in planning, scheduling, and executing retail promotions, ensuring effective coordination, optimal resource use, and alignment with business strategies.

## 2. Scope

This procedure applies to all retail promotion activities, including but not limited to seasonal sales, product launches, in-store events, and digital campaigns.

## 3. Responsibilities

- **Marketing Team:** Develops promotional strategies and creative assets.
- **Sales Team:** Aligns promotion with sales targets and provides frontline feedback.
- **Retail Operations:** Implements promotion in-store and ensures planogram compliance.
- **Finance:** Allocates and monitors the promotional budget.
- **Project Manager/Promotion Coordinator:** Oversees scheduling, resource allocation, and milestone tracking.

## 4. Procedure

Step	Activity	Responsible Party
4.1	Define promotion objectives (e.g., increase sales, launch product, clear inventory).	Marketing, Sales
4.2	Analyze historical data and market trends to inform campaign strategy.	Marketing Analyst
4.3	Develop promotion concept, messaging, and creative materials.	Marketing Team
4.4	Create detailed promotion schedule, including key milestones and deadlines.	Promotion Coordinator
4.5	Allocate budget and resources (staffing, inventory, displays, digital assets).	Finance, HR, Operations
4.6	Coordinate with internal teams and external vendors as needed.	Promotion Coordinator
4.7	Communicate promotion plan to all stakeholders, including training for frontline staff.	Promotion Coordinator, Store Managers
4.8	Launch promotion as scheduled, monitor execution in-store and online.	Retail Operations, Digital Marketing
4.9	Track performance metrics (sales data, customer engagement, ROI).	Analytics Team
4.10	Conduct post-promotion analysis and capture lessons learned for future campaigns.	All Teams

## 5. Documentation & Records

- Promotion briefs and approvals
- Campaign schedules and resource allocation sheets
- Budget tracking reports
- Performance and post-campaign analysis reports
- Stakeholder communication logs

## 6. Key Performance Indicators (KPIs)

- Promotion sales uplift vs. forecast
- Customer traffic and engagement
- Promotion ROI
- On-time campaign execution
- Inventory sell-through rates

## 7. Review & Continuous Improvement

1. Schedule regular post-campaign reviews involving all key stakeholders.
2. Document findings and identify actionable improvements.
3. Update SOP as needed based on lessons learned and business changes.

## 8. Revision History

Date	Version	Description	Author
2024-06-01	1.0	Initial SOP release	Retail Operations Team