

Holiday Card checklist

SUPPLIES:

- Festive colored pen Other
- Postage—make sure to get the holiday stamps www.usps.com
- Holiday cards including envelopes - *You don't have to send the same card to everyone. Mix it up!*

NOVEMBER 1ST

Go through CRM (database) to determine who is receiving a holiday card

- ⇒ Clients—Past and Current
- ⇒ Business Relationships (vet, doctor, hair stylist, mechanic, babysitter, house keeper, insurance agent, etc)
- ⇒ Friends
- ⇒ Family

Tip: Focus on cleaning this area up of your database. Capitalize where needed, any divorces, deaths, birthday, etc.

Export the database and review for accuracy

NOVEMBER 8TH

Decide what to send. Are you going to:

- Purchase cards locally
- Order personalized cards online (meaning you will order from a stationary company and have them mailed to you)
- Use an online greeting card company.
- Get all fancy with a photo, create your own message and upload to online service to print and mail to you
- Other

NOVEMBER 15TH

Set aside a couple of hours to self-address the envelopes (handwrite your return address on the flap side of the envelope)

NOVEMBER 22ND

Set aside 30 minutes a day to start hand addressing the envelopes, write personal message in the card, sign the card and stuff the envelope.

DECEMBER 2ND

Add postage to all envelopes

DECEMBER 6TH

Take holiday cards to post office.

ADDITIONAL NOTES: