

STAPLES
Business Advantage

Master Your Holiday To-Do List (and Impress Your Boss)

The holiday season can potentially add a load of extra tasks — everything from planning a company party to organizing cards and gifts for customers and staff. It all requires a lot of behind-the-scenes work, even if you make it look easy.

A project plan that kicks off early will give you more time, ensure that everything gets done, and even help you showcase your organizational skills. Use the following checklist to get started, adapting it as needed for your situation.

October

Tip for the month: Making big decisions — where to hold the company party, for instance — is easier when you bring a range of options for your manager's review. Detail the advantages and limitations of each choice, to provide context for his or her input.

To-do's:

- Create a project plan. Treat holiday planning like any other business project: Concisely outline all the tasks and steps required, along with your budget and the points where you'll need your manager's approval to move forward, advises Bruce Tulgan, author of "It's OK to Manage Your Boss." The easier you can make it for your boss to sign off, the better.
- Decide on the location for your holiday party: On site or off site? If off site is an option, consider parking, traffic and overall ease of access for the team. For on site parties, quality of food is central to success. Choose a provider that comes recommended or whose food you know well. Avoid skimping on quantities.
- Firm up your customer gift list. Review last year's gift list, invoice lists and any other documents that should be considered. Ask management or customer-facing employees to let you know if there are names to add or drop, and double-check addresses. Update your list with new titles and check spellings of all names.
- Choose customer gifts. Timing is essential if you plan to order items branded with your company logo, so present your top choices to your boss as soon as possible. Make this purchase when you are clear on the quantities required.

November

Tip for the month: Call in the reinforcements! Identify specific tasks that others can take care of and assign them. Recruit volunteers who aren't facing a crunch during the holiday season; you might also look for people who are notably organized or who have a knack for the task you have in mind. For example, your extra-stylish coworker may be a great choice to plan party decorations.

See the next page for more tips.

To-do's:

- Send out holiday party invitations. Once you've booked the date with a venue or caterer, send invites early to help colleagues plan for this busy season. Set a deadline for RSVPs at least two weeks out from the event to give yourself ample time to finalize party planning details. Send a save-the-date email if there is a lag before invitations go out.
- Select your company's holiday card. Create a customized card using an online service, making sure you're getting professional-quality cards. Before you buy, print out a PDF of the design you chose to show your boss what it will look like.
- Do a budget check-in. Take a moment to be sure you're on solid footing, and adjust as needed. If it looks like you'll have money left over, start to consider where you might spend that money to make the holiday season extra special.
- Order the cards. Remember to purchase any extra items you need — return-address stamps or stickers, for example.
- If using a caterer for the holiday party, go over the details. Select the menu, and discuss what role the caterer will play in setup, serving and cleanup.
- Circulate holiday cards to get signatures.
- Wrap client gifts. Once your gifts for clients arrive, wrap them in quality paper and attach tags (or the signed holiday card, if you want to send the two together) and prepare them for mailing. It takes time, but this extra effort is well worth it.
- If sending cards separately from gifts, stuff and address the envelopes.

December

Tip for the month: You're in the home stretch, where it's all about handling the final details. Tulgan advises that you brief your boss as needed, and the final weeks are a good time to do this. Remember to keep all updates short and straightforward.

To-do's:

- Remind coworkers about the holiday party. Send reminders early in the month, and check in with those who haven't responded yet.
- Do a final budget assessment. Decide how to allocate any remaining funds, if you have them.
- Send cards and gifts to clients. Aim to get these out in the first week of the month, if possible.
- For on-site parties, purchase holiday decorations. Finalize all the details that will help create a festive atmosphere at the office, such as music playlists or rearranging furniture to make more space. Get a custom-made holiday banner with the money you saved.
- Consider the logistics of setting up the holiday party, and recruit volunteers to help you manage specific tasks during the event.
- Enjoy the party! You've earned it. As you relax with coworkers, take note of what elements people most enjoy, and what you might change next year.

When the holiday rush is over, gather feedback from colleagues about what worked and what could be improved. Be sure to save documents, useful web links and contact information that you used this year. Armed with that information, next year will be a breeze.