

90 DAYS TO BFCM

# Complete Preparation Checklist



**attentive**<sup>®</sup>

**The Marketers Sanctuary**

Follow these essential steps and track your progress to build a solid email and SMS foundation that will serve you well during the biggest shopping event of the year.

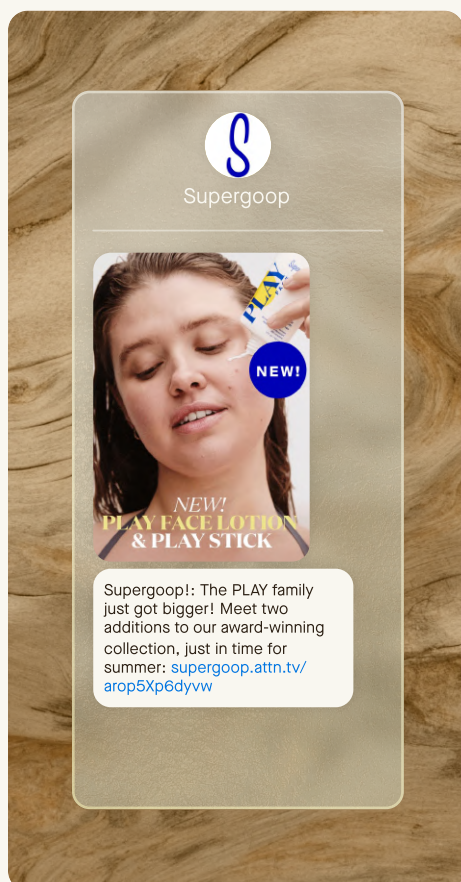
Revisit the full 90-day BFCM guide for detailed guidance on each of these strategies.

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## *One:* Channel Alignment and Strategy

### GOAL

Create a unified email and SMS approach



### CHECKLIST

- ☐ **Audit current channel usage** to review how you're currently using email vs SMS
- ☐ **Define channel-specific roles:**
  - ☐ SMS for: Flash sales, low-stock alerts, welcome texts, first-touch cart abandonment, order updates, VIP access
  - ☐ Email for: Product launches, recommendations, education, cart abandonment follow-ups, loyalty updates, brand news
- ☐ **Map out sequential customer journeys** that use both channels strategically
- ☐ **Consolidate platforms** if email and SMS are managed separately
- ☐ **Create content calendar** showing coordinated email/SMS campaigns

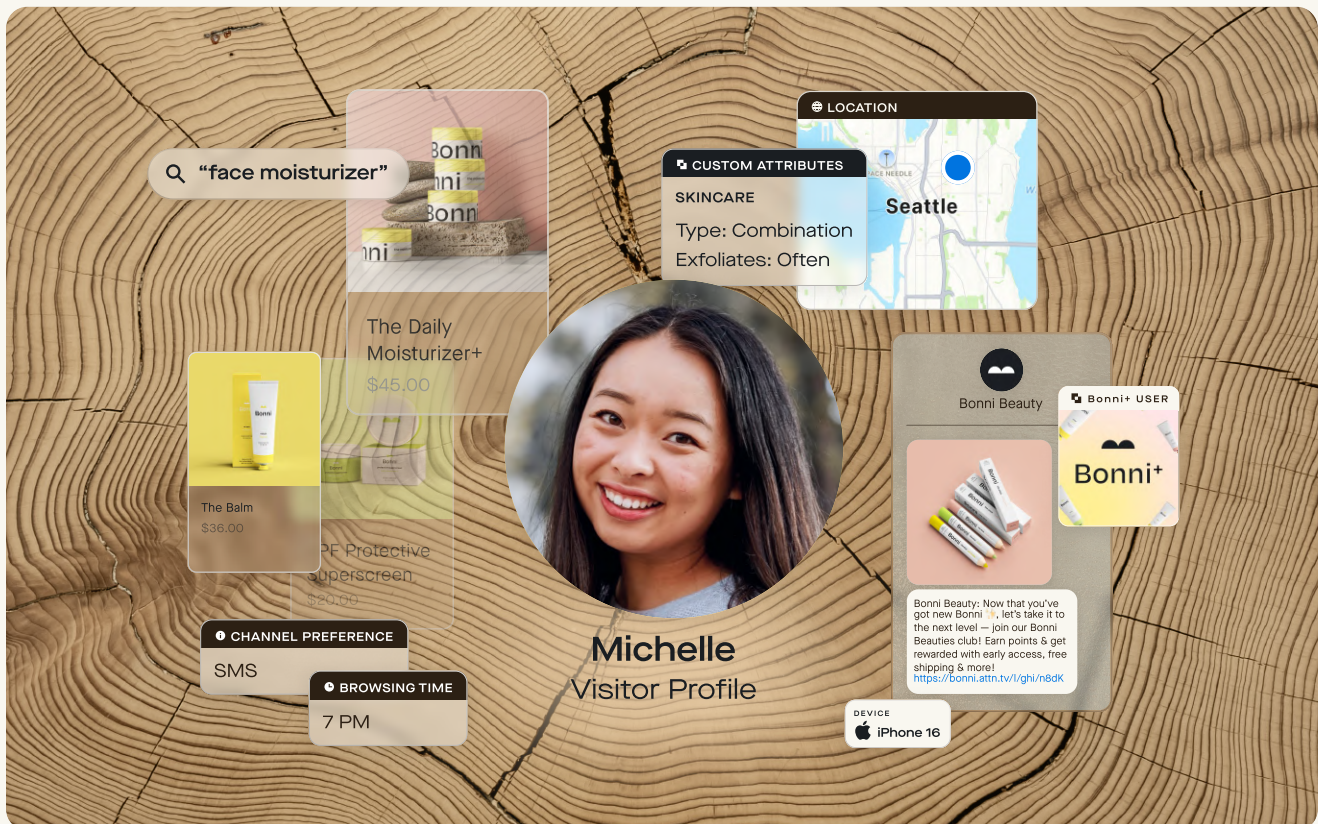
# Two: Customer Data and Personalization Set-up

## GOAL

Collect and leverage customer data for better targeting

## CHECKLIST

- ☐ **Set up Attentive Signal** (or equivalent) for cross-device customer tracking
- ☐ **Add preference** questions to all sign up forms and units
- ☐ **Create zero-party data collection strategies:**
  - ☐ Design customer preference quizzes
  - ☐ Set up conversational text campaigns for data collection
  - ☐ Create post-purchase surveys
- ☐ **Audit existing customer data** for completeness and accuracy
- ☐ **Implement data hygiene processes** for ongoing data quality

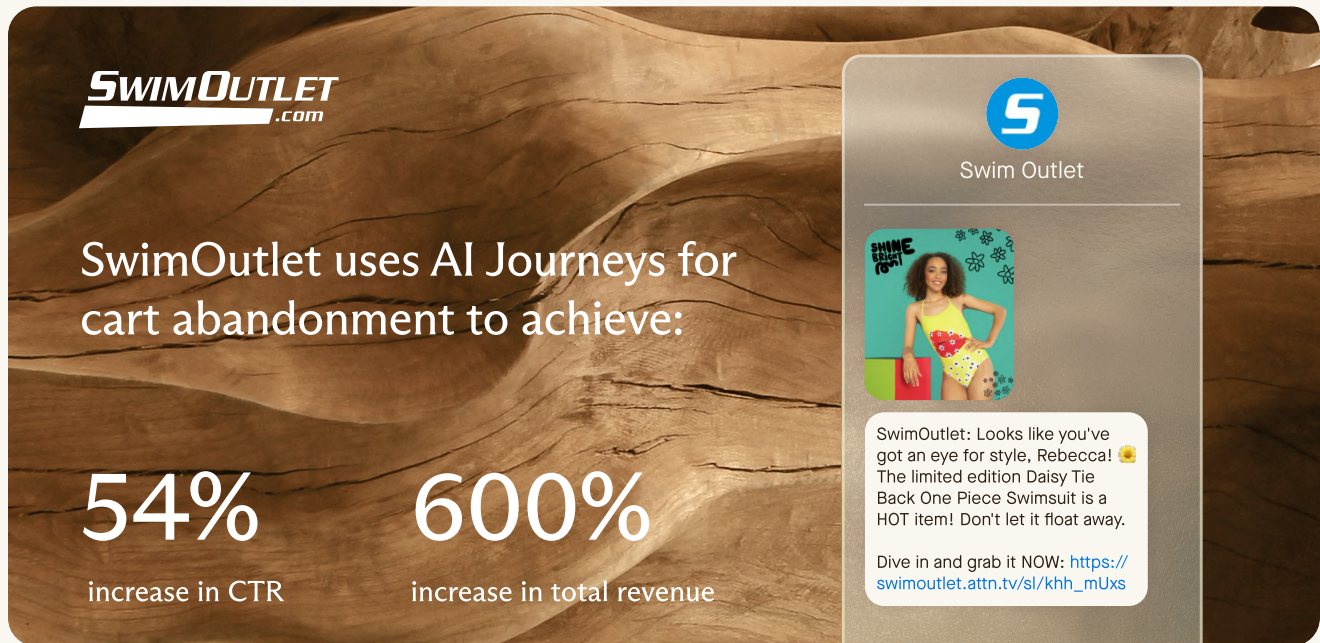




# Three: AI Implementation and Optimization

## GOAL

Deploy AI tools early so they can learn before peak season



The image shows a mobile app notification for SwimOutlet. The background is a wooden texture. On the left, the SwimOutlet logo is at the top. Below it, the text reads: "SwimOutlet uses AI Journeys for cart abandonment to achieve:". Underneath this, two large percentages are displayed: "54%" with "increase in CTR" below it, and "600%" with "increase in total revenue" below it. On the right, there is a notification card with the SwimOutlet logo at the top. Below the logo is a photo of a woman in a swimsuit. The text in the card says: "SwimOutlet: Looks like you've got an eye for style, Rebecca! 🌟 The limited edition Daisy Tie Back One Piece Swimsuit is a HOT item! Don't let it float away. Dive in and grab it NOW: [https://swimoutlet.attn.tv/sl/khh\\_mUxs](https://swimoutlet.attn.tv/sl/khh_mUxs)".

## CHECKLIST

- ☐ **Assess AI needs** based on your business goals and current capabilities
- ☐ **Implement core AI features:**
  - ☐ Identity tools like Identity AI for enhanced customer recognition
  - ☐ List growth optimization tools like AI Grow
  - ☐ Send time optimization tools like Send Time AI for perfect campaign timing
  - ☐ Audience segmentation tools like Audiences AI for better segmentation
  - ☐ Automated copywriting tools like AI Essentials
  - ☐ Customer journey automation tools like AI Journeys for personalized customer flows
- ☐ **Allow 4-6 weeks** for AI systems to learn and optimize
- ☐ **Monitor AI performance** and adjust settings as needed



# *Four:* Audience Growth Strategy

## GOAL

Maximize list growth before the season begins

## CHECKLIST: ONLINE GROWTH TACTICS

- ☐ **Website optimization:**
  - ☐ Add welcome popups to homepage
  - ☐ Add popups to collection pages
  - ☐ Add popups to product pages
  - ☐ Enable persistent bubble for popup re-engagement
  - ☐ Set up exit-intent popup with compelling final incentive
  - ☐ Turn on checkout opt-in (Shopify users)
- ☐ **Social media promotion:**
  - ☐ Add sign-up links to bio on all platforms
  - ☐ Create Instagram Stories promoting list sign-up
  - ☐ Design multi-step forms to capture both email and phone numbers
- ☐ **AI-powered growth:**
  - ☐ Consider implementing AI Grow for personalized popup experiences

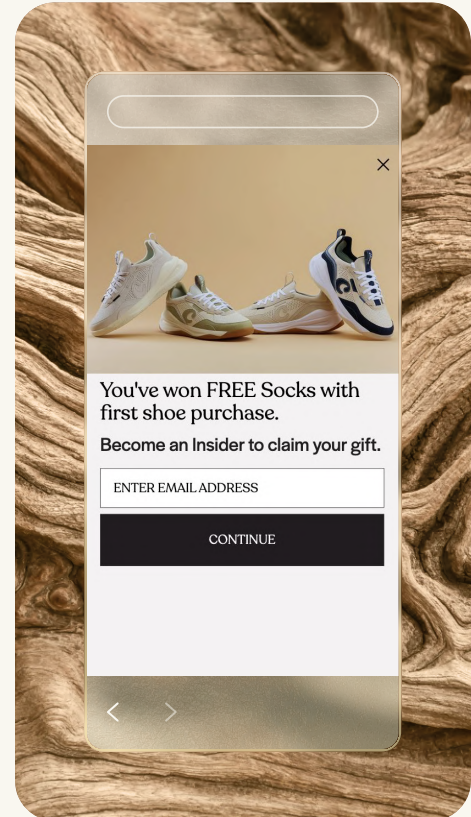
## CHECKLIST: OFFLINE GROWTH TACTICS

- ☐ **Create QR codes** for easy mobile sign-up
- ☐ **Develop Text-to-Join keywords** for offline campaigns
- ☐ **Retail location optimization:**
  - ☐ Display sign up prompts in dressing rooms
  - ☐ Add sign-up prompts at checkout
  - ☐ Include sign-up CTAs on receipts

- ☐ Train retail staff to promote email/SMS signups during transactions
- ☐ **Direct mail integration:**
  - ☐ Include subscription CTAs in order packages
  - ☐ Add sign-up prompts to direct mail campaigns

#### CHECKLIST: INCENTIVE STRATEGY

- ☐ **Define compelling sign-up incentive** (discount, exclusive access, etc.)
- ☐ **Communicate value proposition** beyond just the initial incentive
- ☐ **Highlight SMS-specific benefits** (faster alerts, exclusive deals, etc.)
- ☐ **Test different incentive types** to find what resonates with your audience



## Five: Deliverability and Engagement Preparation

### GOAL

Ensure messages reach inboxes during high-volume periods

#### CHECKLIST: SMS READINESS

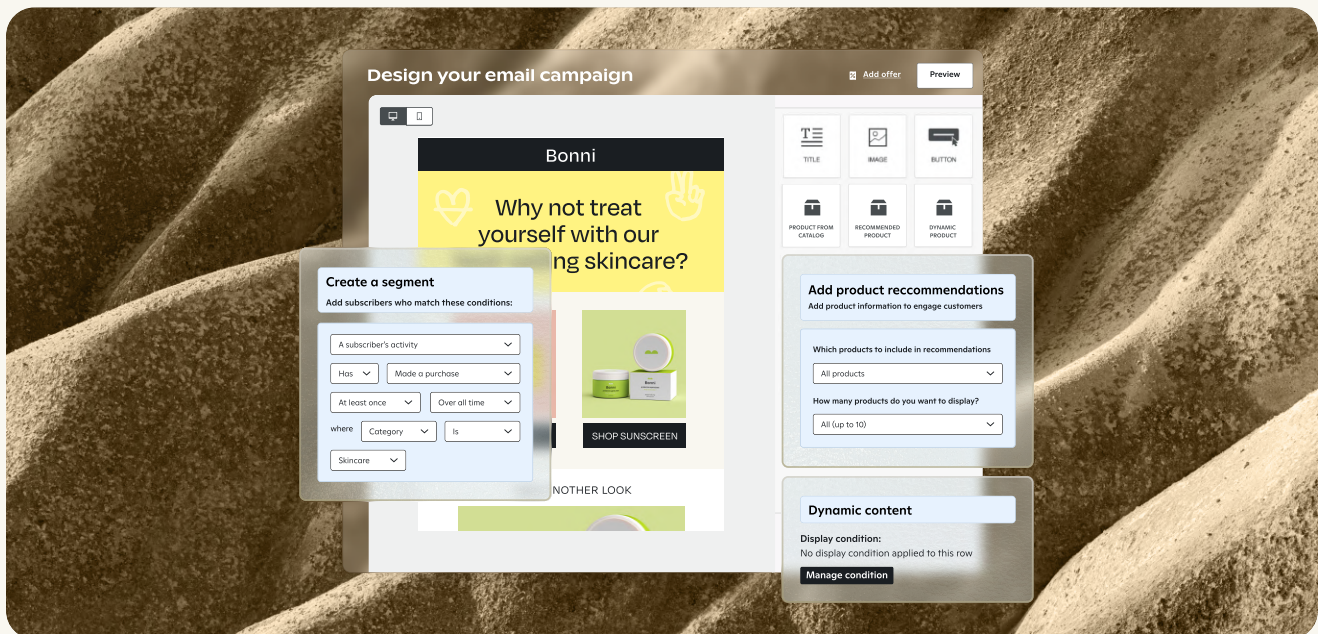
- ☐ **Switch to shortcode** for improved message delivery during BFCM
- ☐ **Create contact card** (MMS capability required, US only)
- ☐ **Encourage subscribers** to save your brand as a contact
- ☐ **Test message delivery** across different carriers and devices

### CHECKLIST: EMAIL DELIVERABILITY

- ☐ **Conduct deliverability audit** of current email program
- ☐ **Determine target BFCM sending volume** based on historical data
- ☐ **Create volume increase plan:**
  - ☐ Plan gradual increases (5-10% daily maximum)
  - ☐ Start volume increases 4-6 weeks before BFCM
  - ☐ Train retail staff to promote email/SMS signups during transactions
- ☐ **Direct mail integration:**
  - ☐ Include subscription CTAs in order packages
  - ☐ Add sign-up prompts to direct mail campaigns

### CHECKLIST: ENGAGEMENT BUILDING

- ☐ **Implement list warming strategy** for low-engagement segments
- ☐ **Establish consistent sending schedule** so subscribers expect regular communication
- ☐ **Create re-engagement campaigns** for dormant subscribers
- ☐ **Monitor engagement metrics** and adjust frequency as needed





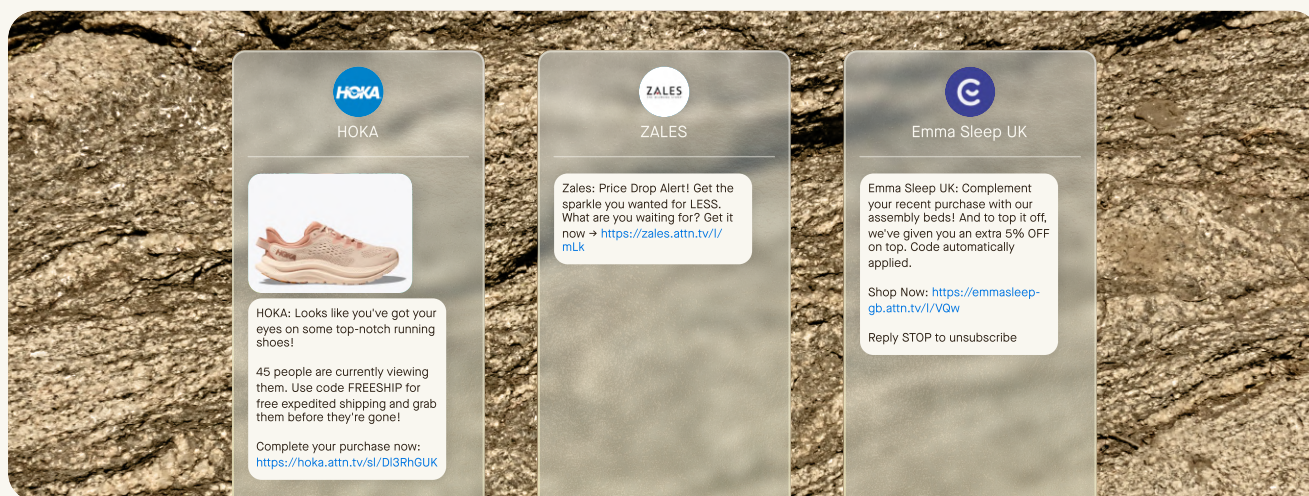
# Six: Automated Journey Set-up

## GOAL

Create steady automated revenue streams

## CHECKLIST: ESSENTIAL AUTOMATED FLOWS

- ☐ **Welcome series** - Multi-touch introduction to brand and products
- ☐ **Cart abandonment** - Recover lost sales with timely reminders
- ☐ **Browse abandonment** - Re-engage visitors who viewed but didn't purchase
- ☐ **Post-purchase** - Thank customers and encourage repeat purchases
- ☐ **Winback campaigns** - Re-engage lapsed customers
- ☐ **Inventory alerts** - Notify interested customers when items restock
- ☐ **Transactional messages** - Order confirmations, shipping updates, delivery notifications



## CHECKLIST: JOURNEY OPTIMIZATION

- ☐ **Map customer journey touchpoints** for each automated flow
- ☐ **Set appropriate timing delays** between messages in each series
- ☐ **Create mobile-optimized content** for all automated messages
- ☐ **Test journey triggers** to ensure proper activation

# *Seven:* Program Optimization and Testing

## GOAL

Continuously improve performance through strategic testing

## CHECKLIST: BEHAVIORAL FLOW TESTING

- ☐ **Test copy variations** in key automated flows
- ☐ **Optimize trigger timing** for maximum effectiveness
- ☐ **Test flow message order** and sequence
- ☐ **Implement conversational elements:**
  - ☐ Add surveys to gather feedback
  - ☐ Include quizzes for personalization
  - ☐ Test interactive content formats
- ☐ **Consider AI Journeys** for 1:1 personalization at scale

## CHECKLIST: SIGN-UP UNIT OPTIMIZATION

- ☐ **Test incentive types** (discount vs free shipping vs exclusive access)
- ☐ **Optimize trigger timing** (immediate vs delayed vs exit-intent)
- ☐ **Analyze post-signup behavior:**
  - ☐ Track subscriber spending patterns
  - ☐ Monitor engagement rates
  - ☐ Measure list retention rates
- ☐ **A/B test popup designs** and copy

## CHECKLIST: CAMPAIGN EFFECTIVENESS TESTING

- ☐ **Test message formats:**
  - ☐ MMS vs SMS for text messages
  - ☐ Plain text vs stylized HTML for emails

☐ **Test urgency and tone:**

- ☐ Sense of urgency in messaging
- ☐ Brand voice and tone variations

☐ **Test incentive strategies:**

- ☐ Different discount amounts
- ☐ Various CTA buttons and copy

☐ **Optimize send times:**

- ☐ Manual send time testing
- ☐ Implement Send Time AI for automatic optimization

**CHECKLIST: SEGMENTATION REFINEMENT**

- ☐ **Test engagement thresholds** for different audience segments
- ☐ **Implement Audiences AI** for intelligent, automated segmentation
- ☐ **Create VIP customer segments** based on purchase history
- ☐ **Develop behavioral segments** based on browsing and purchase patterns





## *Eight:* Platform and Infrastructure Readiness

### GOAL

Ensure your technology can handle BFCM traffic and volume

### CHECKLIST: PLATFORM ASSESSMENT

- ☐ Evaluate current platform capabilities for handling high-volume periods
- ☐ Consider platform consolidation if using separate email and SMS tools
- ☐ Verify integration capabilities between marketing tools and ecommerce platform

### CHECKLIST: PERFORMANCE AND SUPPORT

- ☐ Confirm deliverability rates (aim for 99%+ for both SMS and email)
- ☐ Verify compliance tools are properly configured and monitored
- ☐ Test customer support availability during peak periods
- ☐ Review platform's advanced orchestration capabilities
- ☐ Ensure no planned downtime during BFCM period

**Questions or need help implementing these tactics?**

Reach out to your Customer Success Manager for personalized guidance and support