



SHAMROCK
COMPANIES INC.

The Q4 “Holiday Readiness” Countdown



Beating the deadlines and securing production slots.

BUDGET & APPROVALS

- ☐ **Budget Sign-Off**
Is your holiday gifting budget approved and allocated by tier — executive, employee and customer? Waiting until October can cost you both money and production slots.
- ☐ **Gift Policy Review**
Do any of your corporate clients or partners have gift acceptance policies or spending caps? Confirm before ordering to avoid awkward returns.

PRODUCT SELECTION

- ☐ **Gift Tier Strategy**
Have you defined what each recipient tier receives? A clear good/better/best framework prevents last-minute scrambles and keeps spend consistent.
- ☐ **Trend & Sample Review**
Have you reviewed new product options with your promo partner? Premium gifting trends shift year to year — what was hot last year may feel dated this season.
- ☐ **Brand Alignment Check**
Does every item in your gift lineup use your current brand standards — colors, logo version, packaging style, etc.?
- ☐ **Global Supply Check**
For custom-manufactured promo or apparel, do you know when you need to place orders to account for overseas shipping timelines?

CREATIVE & MESSAGING

☐ **Creative Finalization**

Will your holiday themes and messaging be approved by mid-September to allow for custom production?

☐ **Custom Packaging**

Have you considered branded boxes, tissue paper, ribbon or inserts? Unboxing experiences significantly impact how gifts are received and remembered.

☐ **Handwritten Notes or Cards**

For executive-level gifts, is there a personalized message plan in place — and who is responsible for writing and signing them?

PERSONALIZATION & EXPERIENCE

☐ **Digital Gifting Option**

For remote or international recipients, do you have a virtual gifting or eGift solution as a backup?

☐ **Kitting & Assembly Plan**

If sending experience boxes, have you reserved kitting hours with your fulfillment team for the November/December rush?

LOGISTICS & FULFILLMENT

☐ **Recipient List Scrub**

Is your mailing list updated? A 5% “Return to Sender” rate on premium holiday gifts is a significant wasted expense.

☐ **Address Verification Deadline**

Set a firm deadline for recipients to confirm or update shipping addresses — especially for employees who may have moved.

☐ **International Shipping**

For global recipients, have you confirmed customs requirements, duties and in-country delivery timelines?

☐ **Backup Inventory**

Have you ordered a small overage (typically 10–15%) to cover last-minute additions, damaged items or new hires?

☐ **“Early Bird” Shipping**

Have you scheduled your bulk shipments to arrive before the mid-December carrier bottlenecks?

