



5 Holiday Marketing Action Items

Here are 5 high-value action items that you can take in Total Expert to ramp up your marketing efforts for the holiday season!

1. Schedule social media posts in advance.

- **Schedule for major holidays**
 - Also, remember that “every day is a holiday” and look for unique holidays.

2. Schedule multiple holiday email blasts in advance.

- **Check to see if you have holiday campaigns available to opt in to.**
- **If no campaigns are currently available, schedule multiple blasts throughout the season.**
 - Use Groups and Smart Groups to identify target groups.
- **Review and act on email stats.**
 - Access email stats in the platform by navigating to **Email Marketing** → **Email Stats**.

3. Send holiday postcards using direct mail or EDDM through Total Expert.

- **Send holiday postcards directly from the system using USPS direct mail or EDDM.**
- **Export custom lists of contacts to CSV to create mailing labels outside of Total Expert.**
 - From the Groups menu, click the number in the Lead Count column to quickly navigate to the list of leads in that group, then select the contacts and click the **Export CSV** icon.

4. Use Focused View to create Custom Views of special clients from this year to reach out to on the phone.

- **Examples include the past year’s clients, business partners, or other special contacts.**
 - Use Groups and Smart Groups as Inclusion Rules to build Custom Views.

5. Host a virtual event and use the Event Registration lead capture app for registration and lead generation.

- **Host a session on something you are knowledgeable about, or co-host with a partner.**
 - Have an industry, market, or local theme.
- **Host a social event for customers or business partners.**
 - Attend virtual events yourself to generate more ideas!