



Special Events Checklist

Each promotional sale and special event will be unique, however some of the same components to preparing and planning for the event can be included in the promotional sale/special event plan. It's crucial to remember that every plan should be flexible and change with circumstances. Below is a checklist of items to consider incorporating into your plan.

Event Assessment

- Event Type (celebrity appearance, in-store entertainment, promotional sale, etc.)
- Scope of Event (number of expected guests and duration of the event)
- Time Frame (amount of advanced notice)

Planning

- **Staffing**

✓ Ensure that stores will have adequate staffing levels throughout the event. Staffing should take into consideration all critical positions (cashiers, loss prevention, security, re-stocking, sales associates, management)

✓ Make arrangements for extra staffing and additional security personnel in locations where a history of prior incidents warrants increased attention.

✓ For events that will draw large crowds, contact law enforcement to notify them of the upcoming event.

✓ Utilize separate entrances for staff and appropriate door monitors in these areas.



- **Training**

- ✓ Associates working the day of the event and back-up associates should all be trained and knowledgeable of both the event and promotional items including merchandise placement, event location and timing of special/hourly promotions.
- ✓ Brief associates on what to communicate to unhappy customers and which managers and other store personnel should be notified to de-escalate certain situations.
- ✓ For large-scale events, consider hosting a dress rehearsal in advance.
- ✓ Associates should be trained on who to contact in the event of any situations and who the key decision maker is on the day of the event. Additionally, associates should be informed of procedures (if any)/ or protocols for dialing 911.
- ✓ Review evacuation procedures.

- **Communication**

- ✓ Provide a clear communication plan which covers how critical information will be delivered on the day of the event to customers, celebrity guests, entertainers, associates, security personnel, mall management and law enforcement.
- ✓ Contact local fire and law enforcement agencies to determine if the event site meets all public safety requirements.
- ✓ When required by local authorities and to maximize safety for consumers and associates, ensure that all permits and licenses are obtained and that local emergency services, including the local authorities, are aware of the event
- ✓ Devise a clear communication plan on how potential issues should be communicated to the key decision maker.
- ✓ Designate a point of contact who will liaise with law enforcement prior to the event (if necessary) and during the event (if an emergency situation arises).
- ✓ Consider renting or purchasing two-way radios and utilizing them the day of the event to communicate with key managers, security personnel, floor monitors, etc. Cellular phones are not effective for mass communication.



✓ Utilize signage or pamphlets to communicate entrance locations, store opening times, traffic flow, merchandise placement and event location.

✓ Use public announcement (PA) system, if available, to communicate pertinent information to customers inside the store. If the PA system broadcasts outside the store, it could be used to communicate to customers waiting in line either prior to or during the sale/event. These announcements can also include seasonally appropriate music, information on specials and where they are located within the store.

- **Physical/Environmental Considerations**

✓ Store Layout – Utilize the physical/environmental layout of the store to your advantage during the event. Entry and Exit Points should be determined based on how the crowd will be able to file into the store as well as the best place outside of the store where it makes the most sense for the line to form.

✓ Merchandise Layout – Promotional sale items should be placed throughout the store to dissipate crowds and help alleviate potential congestion.

✓ Entertainment Location – Similar to merchandise layout, the location of the special event/celebrity guest/entertainment should complement the layout of the store as well as any merchandise that may be promoted alongside the event. Security for both the celebrity/entertainer and customers should be taken into consideration for staging and execution of the event.

- **Line Formation Considerations**

✓ Pre-determine the location and flow of the line, with a back-up plan to manage the unexpected (larger crowds, extreme weather conditions, etc.).

✓ Consider staffing the line either with security, store associates or entertainers.

✓ Stage the line entrance away from the store entrance so that customers are not directly in front of the store entrance.

✓ Line monitors can assist in keeping customers updated with the status of events, availability of merchandise and other factors that may affect their decision to stand in



line. Additionally, having line monitors builds rapport with customers as unpleasant news will be better received from a person who has been standing outside with them for a majority of their wait time as opposed to an unfamiliar face.

✓ Lighting up the parking lot to accommodate customers arriving at early hours or making additional accommodations, such as renting portable bathrooms, may also alleviate frustrations or anxiety of customers waiting in long lines.

✓ Position security or crowd monitors to the sides of entering (or exiting) public, not in the center of their path.

✓ Provide an alternate entrance for people with disabilities.

- **Event Logistics**

✓ Pre-Opening

- Establish early arrival times for associates.
- Establish the timing and the personnel who will set out signage, line stanchions/barriers, hand out wristbands, or act as line monitors communicating with early arriving customers.
- Provide legible and visible signs that describe entrance locations, store opening times, and other important information such as the location of major sale items. Line stanchions/barriers should be set up prior to customers arriving.
- Stanchions/barriers should be set up in a snake formation for crowd management purposes and have enough breaks and turns at regular intervals to maintain an orderly flow.
- Use more than one entrance to alleviate overwhelming crowds, if possible.
- When the store reaches maximum occupancy, do not allow additional customers to enter until the occupancy level drops.



√ Store Opening

- Determine what doors will open and who, if anyone, will monitor the doors. Make sure all employees and crowd control personnel are aware that the doors are about to open.
- Consider propping open doors while the traffic flow entering the store is heavy; this will help avoid potential safety issues.
- Create a site map, which includes traffic flow, clearly marks promotional items/special event location, location of critical staff members and law enforcement liaison.
- Have managers and key decision maker in key locations throughout the store when the store initially opens/event commences and at key times throughout the sale/event.

- **Emergency Situations**

√ Instruct employees to call 911 and follow internal procedures once they have called for assistance.

√ Have Automatic External Defibrillator (AED) device(s) readily available and key staff trained on how to use the device as well as how to perform Cardiopulmonary Resuscitation (CPR).

√ Address potential dangers employees may face including: overcrowding, aggressive shoppers, violent acts, being struck/crushed by the crowd, fire and unexpected natural/man-made disasters.

√ Consider sharing these emergency plans with local public safety agencies.