

A Step-by-Step Framework for Planning, Launching, and Managing Year-End Incentive Programs at Scale

Phase 1: Strategy & Alignment (July)

Define Program Goals

- Identify primary audience(s)
 - Employees
 - Customers
 - Channel partners
 - Sales teams
 - Loyalty members
 - Other stakeholders
- Define desired outcomes
 - Employee recognition
 - Retention
 - Customer loyalty
 - Sales performance
 - Partner engagement
 - Holiday appreciation
- Establish success metrics
 - Participation rate
 - Reward redemption rate
 - Program utilization
 - Budget adherence
 - Delivery success rate
 - Recipient satisfaction

Identify Stakeholders

- HR leadership aligned
- Finance leadership aligned
- Procurement involved
- Operations informed
- Regional teams consulted
- Executive sponsors identified
- Reporting owners assigned

Budget Planning

- Total budget approved
- Department allocations finalized
- Contingency budget reserved
- International requirements considered
- Funding process documented
- Approval thresholds established

Notes

Phase 2: Audience Planning & Segmentation (August)

Define Recipient Groups

- Employee segments
- Customer segments
- Partner segments
- Global recipients
- High-value recipients
- Special recognition groups

Determine Reward Strategy

- Gift cards
- Choice-based rewards
- Prepaid reward cards
- Physical rewards
- Digital rewards
- Hybrid approach

Notes

Localization Review

- International recipients reviewed
- Country-specific reward options selected
- Currency considerations addressed
- Local brand relevance validated
- Language requirements reviewed

Personalization Planning

- Messaging strategy defined
- Executive communications drafted
- Department-level communications created
- Recognition messaging customized
- Branding assets approved

Phase 6: Post-Holiday Review (January)

Measure Program Performance

- Budget vs actual spend analyzed
- Delivery metrics reviewed
- Redemption metrics reviewed
- Participation rates evaluated
- Stakeholder feedback collected
- Recipient feedback collected

Prepare for Next Year

- Lessons learned documented
- Process improvements identified
- Vendor performance evaluated
- Reporting requirements updated
- Planning timeline refined
- Q3 planning calendar established

Notes

Common Holiday Incentive Program Failure Points

Before launching your program, confirm you have avoided these common issues:

- Planning began before Q4
- Budget approvals completed
- International recipients considered
- Reward options localized
- Reporting capabilities configured
- Delivery methods tested
- Choice-based rewards available
- Stakeholder responsibilities documented
- Escalation procedures established
- Post-program reporting planned

Holiday incentive programs become increasingly complex as organizations grow. The most successful enterprise teams treat holiday rewards as an operational process—not a last-minute purchase.

Learn how the **Engage2Reward™ Gift Card Ordering Platform** helps organizations manage holiday incentive programs through centralized controls, global reward delivery, budget visibility, approval workflows, fulfillment management, and enterprise reporting.

Enterprise Holiday Incentive Readiness Score

**0–10 Checks Completed:
High Risk**

Significant operational gaps may impact delivery and recipient experience.

**11–25 Checks Completed:
Moderate Risk**

Core planning is underway, but execution challenges remain.

**26–40 Checks Completed:
Strong Readiness**

Program foundation is established with manageable risk.

**41–55 Checks Completed:
Enterprise Ready**

Your organization is positioned to execute a scalable, well-governed holiday incentive program.

Contact Our Team Today!

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