



2026 Holiday Reward Planning Checklist

A practical month-by-month workbook for planning, approving, delivering, and measuring holiday and year-end rewards.

Keep budgets, recipient lists, approvals, personalization, fulfillment, and reporting on track—from early planning through post-campaign review.

Holiday Program Quick-Start

Start Here: Define Your Holiday Reward Program

1. Program Purpose

- ☐ Define the primary goal of the program
 - ☐ Identify the contribution, milestone, or relationship being recognized
 - ☐ Decide whether the campaign is for the holidays, year-end recognition, Thanksgiving, or a combination
 - ☐ Establish what a successful program should accomplish
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2. Recipient Audiences

- ☐ Employees
 - ☐ Remote or distributed teams
 - ☐ Customers or members
 - ☐ Sales teams
 - ☐ Vendors or partners
 - ☐ Volunteers
 - ☐ International recipients
 - ☐ Other: _____
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3. Initial Decisions

- ☐ Estimate the total number of recipients
 - ☐ Determine whether reward values will be uniform or tiered
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- ☐ Identify physical, digital, or blended delivery needs
- ☐ Confirm whether recipient choice is important
- ☐ Determine the level of branding and personalization required
- ☐ Identify required reporting or documentation

Program name: _____

Primary goal: _____

Estimated recipients: _____

Target delivery date: _____

Program owner: _____

Month-by-Month Planning Calendar

Your 2026 Holiday Reward Timeline

Timing	Primary focus	Key milestone
August	Define	Confirm goals, audiences, budget, stakeholders, and initial format
September	Select	Choose reward products, delivery methods, and recipient experience
Early October	Prepare	Finalize creative, recipient data, testing, and support plans
Late October - Early November	Give thanks	Execute an optional Thanksgiving appreciation campaign
Mid-November	Distribute	Place orders, monitor delivery, and manage exceptions
Post-Thanksgiving	Adapt	Shift late or delayed fulfillment toward digital options
December	Complete	Finish delivery, support recipients, and begin reporting
January	Measure	Review delivery, budget use, feedback, and challenges
February	Extend	Apply the process to year-round recognition programs

Budget, Ownership, and Approvals

Build the Operational Foundation

1. Budget Checklist

- ☐ Confirm the total program budget
- ☐ Estimate reward value per recipient
- ☐ Account for different reward tiers
- ☐ Include physical delivery or shipping expenses, if applicable
- ☐ Reserve funds for new hires and late additions
- ☐ Establish department-level budgets, if needed
- ☐ Determine who can approve budget changes
- ☐ Confirm how unused funds or program changes will be handled
- ☐ Document reporting and reconciliation requirements

Budget Worksheet

Budget item	Estimated amount	Approved amount	Owner
Rewards	\$	\$	
Physical fulfillment	\$	\$	
Shipping	\$	\$	
Customization	\$	\$	
Late additions	\$	\$	
Other: _____	\$	\$	
Total	\$	\$	

2. Ownership and Approvals

Responsibility	Assigned Owner	Due Date	Approved?
Program strategy			☐
Budget			☐
Recipient eligibility			☐
Reward selection			☐
Creative and messaging			☐
Legal or tax review			☐
Recipient data			☐
Ordering and fulfillment			☐
Recipient support			☐
Reporting			☐

Choose the Right Reward Experience

Match the Reward to Your Audience

Reward	Best suited for	Decisions to confirm
BrandedChoice™ Rewards Program	Customized, organization-branded reward journey	Branding, catalog, messaging, card design, and delivery
Visa® Reward Cards	Broad flexibility through a physical or digital reward	Product type, approvals, presentation, and disclosures
Targeted gift card brands	A specific audience, need, or campaign theme	Brand fit, denominations, and delivery format
Physical rewards	Tangible presentations and in-person recognition	Production, packaging, shipping, and distribution
Digital rewards	Remote recipients, fast delivery, and late additions	Email or SMS data, messaging, testing, and send timing

Decision Checklist

- ☐ Determine whether one reward will work for the full audience
- ☐ Decide whether recipients should choose their preferred brand
- ☐ Confirm whether rewards will be physical, digital, or both
- ☐ Review domestic and international recipient needs
- ☐ Select available denominations or reward-value tiers
- ☐ Confirm required customization
- ☐ Review fulfillment and shipping timelines
- ☐ Account for accessibility and language requirements
- ☐ Obtain product and creative approvals

Selected reward approach: _____

Why it fits this audience: _____

Build the Recipient Experience

Personalize the Program (3 Levels)

Level 1: Personalized Message

- ☐ Recipient name
- ☐ Sender or leadership name
- ☐ Custom thank-you message
- ☐ Recognition-specific language

Level 2: Branded Delivery

- ☐ Company logo
- ☐ Brand colors
- ☐ Seasonal creative
- ☐ Branded email or SMS
- ☐ Customized physical carrier or insert

Level 3: Fully Branded Experience

- ☐ Customized reward card
 - ☐ Branded notification
 - ☐ Customized marketplace
 - ☐ Curated reward catalog
 - ☐ Branded redemption journey
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Message Builder

Opening:	
What we are recognizing:	
Personal thank-you:	
Redemption or next-step instructions:	
Support information:	

Messaging Review

- ☐ Keep the message concise and recipient-focused
- ☐ Explain why the recipient is being recognized
- ☐ Include clear redemption instructions
- ☐ Add an expiration date or other required information
- ☐ Confirm the sender and reply-to information
- ☐ Review product names and required disclosures
- ☐ Proofread all text before testing

Recipient Data Readiness

Recipient-data checklist

- ☐ Confirm each recipient's full name
- ☐ Validate email addresses
- ☐ Validate mobile numbers if using SMS
- ☐ Confirm mailing addresses for physical delivery
- ☐ Identify department or audience segment

- ☐ Assign the correct reward value
 - ☐ Confirm country or region
 - ☐ Record the selected delivery method
 - ☐ Identify language requirements
 - ☐ Confirm employment, membership, or eligibility status
 - ☐ Remove duplicate records
 - ☐ Identify missing or incomplete information
 - ☐ Separate test recipients from the final list
 - ☐ Protect recipient information during transfer and review
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Exception planning

Decide in advance how the team will handle:

- ☐ New hires
- ☐ Departing employees
- ☐ Late approvals
- ☐ Incorrect email addresses
- ☐ Returned physical shipments
- ☐ Duplicate recipients
- ☐ Missing departments
- ☐ International restrictions
- ☐ Recipients without email or mobile access
- ☐ Rewards requiring replacement or follow-up

Final list owner: _____

List freeze date: _____

Late-addition process: _____

Who can authorize corrections: _____

Thanksgiving and Holiday Delivery Plan

Plan Each Recognition Moment

Part 1: Thanksgiving appreciation

- ☐ Determine if Thanksgiving will replace or supplement December rewards
 - ☐ Finalize creative and messaging by mid-October
 - ☐ Confirm recipient information in late October
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- ☐ Select physical or digital delivery
- ☐ Schedule distribution for early or mid-November
- ☐ Complete the primary send before Thanksgiving week
- ☐ Prepare support for missing or undeliverable rewards

Target send date: _____

Campaign message: _____

Part 2: Holiday and year-end recognition

- ☐ Confirm the main send date
- ☐ Build enough time for physical production and shipping
- ☐ Schedule digital delivery
- ☐ Prepare for late approvals and recipient additions
- ☐ Identify additional year-end recognition audiences
- ☐ Confirm who will monitor delivery activity
- ☐ Create an escalation process for recipient issues
- ☐ Determine when the campaign will officially close

Target send date: _____

Physical order deadline: _____

Digital send deadline: _____

Late-delivery contingency plan

- ☐ Shift eligible rewards to digital delivery
 - ☐ Use digital rewards for late additions
 - ☐ Prepare an updated recipient message
 - ☐ Notify internal stakeholders of format changes
 - ☐ Document all approved exceptions
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Pre-Launch and Fulfillment Checklist

Before launch

- ☐ Confirm final budget approval
 - ☐ Confirm final reward selection and values
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- ☐ Verify recipient eligibility
- ☐ Review the final recipient list
- ☐ Approve all branding and messaging
- ☐ Complete legal, tax, product, or compliance review as needed
- ☐ Confirm physical inventory or production timing
- ☐ Verify shipping addresses and delivery method
- ☐ Test emails, SMS messages, links, and redemption steps
- ☐ Confirm sender information
- ☐ Verify the customer-support process
- ☐ Document escalation contacts
- ☐ Save copies of final approvals

During fulfillment

- ☐ Place or approve the final order
- ☐ Monitor digital delivery activity
- ☐ Track physical shipments
- ☐ Review undeliverable emails
- ☐ Review returned shipments
- ☐ Correct recipient information
- ☐ Process approved late additions
- ☐ Monitor budget utilization
- ☐ Respond to recipient questions
- ☐ Document replacements and exceptions
- ☐ Provide internal status updates

Launch-Day Contacts

Issue	Primary Contact	Backup Contact
Order or platform issue		
Recipient-data correction		
Budget approval		
Creative question		
Recipient support		

Post-Campaign Review and CTA

Measure the Program & Improve the Next One Performance Checklist

- ☐ Review successful and unsuccessful deliveries
- ☐ Record undeliverable emails and returned shipments
- ☐ Review recipient selection or redemption activity when available
- ☐ Calculate budget utilization
- ☐ Document unused or remaining budget
- ☐ Categorize recipient-support questions
- ☐ Count late additions and corrections
- ☐ Identify approval bottlenecks
- ☐ Compare physical and digital fulfillment
- ☐ Gather stakeholder feedback
- ☐ Gather recipient feedback when appropriate
- ☐ Document lessons for the next campaign

Campaign Scorecard

Area	Rating	Notes
Planning timeline	__/5	
Approval process	__/5	
Recipient-data quality	__/5	
Reward selection	__/5	
Personalization	__/5	
Delivery performance	__/5	
Recipient support	__/5	
Reporting	__/5	
Overall program	__/5	

Reflection Questions

What worked especially well?

What caused the most administrative work?

What should begin earlier next year?

What process could be reused for year-round recognition?

Make Holiday Rewards Fast, Flexible & Easy

The Engage2Reward™ Gift Card Ordering Platform helps organizations manage physical and digital rewards, personalized messaging, recipient delivery, budgets, approvals, tracking, and reporting through one centralized platform.

Whether you are creating a fully branded BrandedChoice experience, offering recipient choice, or coordinating holiday rewards across multiple audiences, the right tools can make execution easier from planning through reporting.

Plan Your Holiday Reward Program

1 (800) 413-9101 | info@giftcardpartners.com