

# **PLANNING FOR A MERRY Q4 & HOLIDAY SEASON**

## **PART 1: TAKING THE PULSE**





# Hi, I'm Jess.

co-founder + strategist,  
51group





*Why I'm here.*





# 1

## *Goals & Planning*

1. On a scale from 1–5, how prepared are you for the holiday season/Q4? (1 = not at all, 5 = very)
2. What's your biggest concern going into this season/quarter?
3. Where do you feel the most pressure (sales, staffing, visibility, something else)?



# 2

## *Marketing & Engagement*

1. What channels or tools are working *right now* to bring people in or to make them take action?
2. On a scale from 1 – 5, how much do you know about your customers?
3. On a scale from 1 – 5, how much do you know about your competition? (Local, online, etc.)



# 3

## *Capacity & Efficiency*

1. What is currently helping or hurting your operational efficiency?
2. If you could make one realistic improvement in your business, what would it be?
3. Are you currently using AI in your business to increase efficiency?



# 4

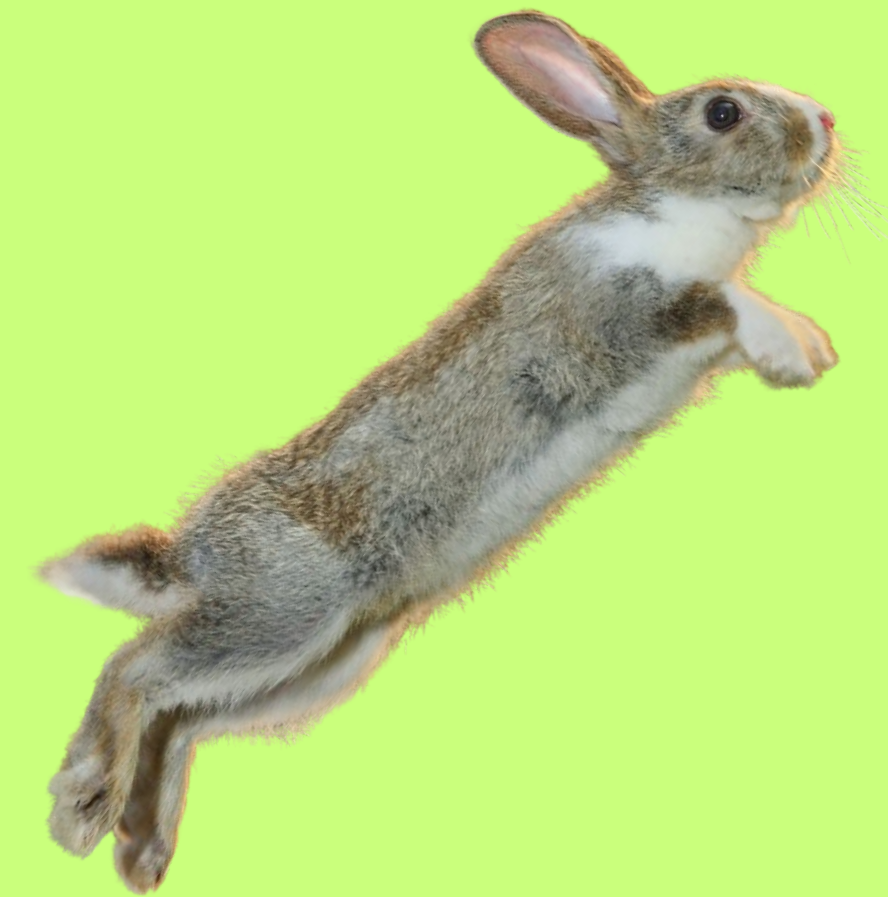
## *Looking Ahead*

1. What does success look like for you one year from now?
2. What do you wish you knew more about when it comes to your business?
3. What would you invest in to improve your business if money were no object?



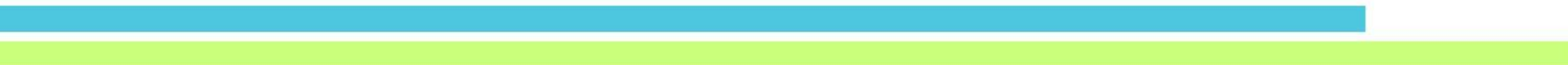
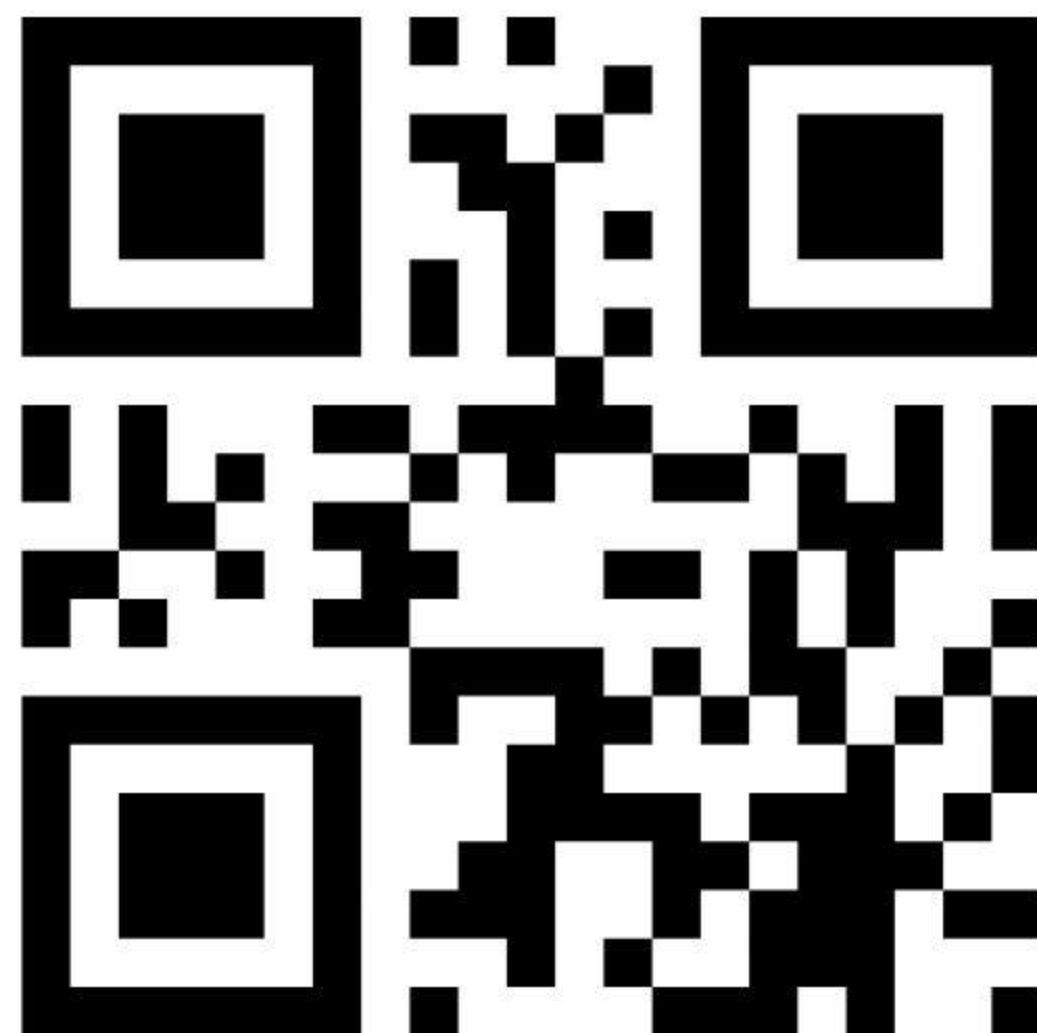
# *What's next?*

1. Take our short survey!
2. Attend the September Meeting for the follow up presentation, *Insight to Action: Your Blueprint for a Merry Q4 and Holiday Season*, where I will:
  - Share findings and insights
  - Present actionable strategies and solutions for a successful Q4/holiday season
  - Discuss strategies for success in 2026





*Please take our survey!*





*Thank you.*

Jess Wolfe, 51group

[jess@the51group.co](mailto:jess@the51group.co)

[linkedin.com/jesstwolfe](https://linkedin.com/jesstwolfe)