

# SPECIAL OCCASION PLANNING AND PROMOTIONS TIMELINE AND CHECKLIST

## TASK

## RESOURCES

### 6 WEEKS OUT

- Review SDLY sales, orders and labor needs for the event
- Collect requests off and availability updated from your staff
- Discuss menu items and formats with your Food Fanatics® Chef
- Discuss product availability with your sales rep
- Discuss menu profitability
- Finalize menu and packaging needs
- Identify special occasion plating and serveware needs
- Determine a marketing budget for the event or occasion

### 5 WEEKS OUT

- Plan social media promotion strategy to drive customer orders
- Hold photo shoot to gather at least 10 images of your offerings
- Determine marketing collateral and digital image creation
- Create partnerships for cross-promotion
- Bring in product to begin testing and training
- Determine available ordering methods and cutoff dates
- Determine any incentives or rewards associated with special event
- Talk to landlord about creating designated curbside/pickup spots

### 4 WEEKS OUT

- Launch social media campaign on Facebook, Instagram and Google
- Add special event or menu splash page to your website
- Add items to POS and any online ordering platforms
- Make any needed adjustments to your reservation platform
- FOH training for call-in orders and upsell opportunities

Contact the [US Foods® Menu](#) team for custom menus, marketing materials and branded images.

For email, SMS, website and other marketing support, contact your website or online ordering partner. To upgrade your current system, visit [Drive Traffic](#) in CHECK® Business Tools for featured partners.

To streamline in-house, catering and online orders, work with your POS and ordering partners. To upgrade your current system, visit [Modernize Operations](#) in CHECK Business Tools for featured partners.



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## RESOURCES

### 3 WEEKS OUT

- Continue social media campaign strategy
- Begin using printed marketing collateral
- Send email blast or SMS text message to your database
- Begin ordering product based on pre-orders
- BOH training on food safety and food packaging standards

### 2 WEEKS OUT

- Continue social media campaign strategy
- Begin writing thank-you cards for all orders
- FOH training on special occasion workflow and expo

### 1 WEEK OUT

- Continue social campaign strategy
- Post on Facebook and Instagram daily with a sense of urgency
- Send reminder email to database
- Check inventory levels of needed products and place order

### DAY BEFORE

- Ensure you are fully staffed and stocked with all products

### DAY OF

- Post on social channels to move last-minute inventory
- Place a test order on your POS/online ordering/third-party platforms
- Review your daily order summary and print production prep sheet
- BOH Pre-shift refresh training on critical temp checks and packaging
- FOH Pre-shift refresh training on curbside/pickup process

### DAY AFTER

- Thank-you post on social channels
- Share tagged content from customers on social channels
- Remove event content from website, if not automated

Staffing templates are available in the No-Cost [Tools](#) section. For staff scheduling, team management, payroll and training services, visit [Simplify Staffing](#).

To calculate theoretical food cost and make profitable menu decisions, visit [Menu IQ™](#).

Leverage Menu IQ, MOXē® Inventory and the Food Cost Calculator for deeper business insights—all at no cost to US Foods customers and available exclusively in [MOXē](#).