

Black Friday Readiness Checklist

Black Friday's coming in hot, and this checklist is all you need to crush the chaos, keep your cool, and make this season your smoothest yet.

Stage 1

Build the Foundation before Black Friday

Plan, align & energize the team

- ☐ Review last year's sales and support data: note peak times, common pain points, and missed opportunities.
- ☐ Set measurable goals for:
 - ☐ Sales targets
 - ☐ Average response time
 - ☐ CSAT and NPS scores
- ☐ Align with marketing on promotions, launch timing, and message consistency.
- ☐ Schedule team briefings and role assignments for peak days.

Automate & enable with AI

- ☐ Deploy chatbots, automated SMS, and smart IVR for routine inquiries and FAQs.
- ☐ Set up after-hours automations for:
 - ☐ Handling missed calls
 - ☐ Booking callbacks
 - ☐ Escalating urgent issues overnight
- ☐ Tag conversations by intent to train future AI models.

Personalize and automate smarter

- ☐ Segment customers by purchase history, loyalty tier, and engagement level.
- ☐ Draft personalized SMS, email, and call scripts for:
 - ☐ Pre-sale teasers
 - ☐ Launch day promos
 - ☐ Post-sale follow-ups
- ☐ Use dynamic fields (name, product type, previous purchase) for a personal touch.
- ☐ Automate order updates, promo reminders, and VIP offers to save reps' time.
- ☐ Set up proactive notifications for order confirmations, shipping updates, and VIP/loyalty offers.

Pro tip:

Let automation handle the busywork, so your team can bring the human magic that actually converts.

Omnichannel readiness

- ☐ Connect phone, SMS, chat, and email into one dashboard.
- ☐ Test handoffs between channels; no customer should have to repeat their story.
- ☐ Double-check that your CRM gives agents full customer context at a glance.

Stage 2

Execute with agility during Black Friday

Scale, flex & support each other

- ☐ Make sure your systems can handle 5x–10x your usual volume.
- ☐ Keep an “on-call reserve” of trained agents ready for surge hours.
- (PS: Automate this with JustCall's AI Voice Agents. 24/7 support on tap without breaking the bank or a sweat)**
- ☐ Automate repetitive workflows (order checks, delivery confirmations, etc.).
- ☐ Keep spirits high: hydration breaks, quick pep huddles, energy snacks.

Pro tip:

A five-minute regroup every few hours can save your team from burnout and missteps.

Monitor, adapt & respond in real time

- ☐ Track your live dashboards for:
 - ☐ Call/ Chat/ SMS volume
 - ☐ Response and resolution times
 - ☐ Customer sentiment
- ☐ Adjust staffing and campaign offers dynamically based on data.
- ☐ Escalate issues instantly using predefined paths (no guesswork).

Pro tip:

Don't just watch the data; act on it. Real-time agility is your biggest Black Friday advantage.

Assure quality & keep spirits high

- ☐ Spot-check conversations for tone, empathy, and compliance.
- ☐ Provide quick, constructive feedback during breaks.
- ☐ Celebrate every small win: a tough save, a happy customer, a great review.
- ☐ Keep “Energy Captains” or micro-leaders to uplift team morale.

Pro tip:

Remind everyone: customers remember how you made them feel, not just how fast you responded.

Stage 3

Convert momentum into loyalty after Black Friday

Turn rush into relationships

- ☐ Send thank-you messages and post-sale offers within 24 hours.
- ☐ Reconnect with:
 - ☐ Abandoned carts
 - ☐ Unresolved tickets
 - ☐ Lapsed high-value customers
- ☐ Collect feedback or quick ratings through SMS or chat links.
- ☐ Personalize your “thank-you” tone. Make your templates sound human and from the heart.

Pro tip:

Strike while the goodwill's fresh. Follow-ups done right build loyalty faster than any discount.

Review, reflect & reinforce

- ☐ Analyze key metrics:
 - ☐ Conversion rates
 - ☐ CSAT/NPS
 - ☐ Average handle time
 - ☐ ROI from each campaign/channel
- ☐ Compare results against the goals you set in Step 1.
- ☐ Conduct a short team retrospective: what worked, what didn't, and why.
- ☐ Identify customer themes or sentiment patterns for next year.
- ☐ Update scripts, workflows, and AI models based on lessons learned.

Pro tip:

Use JustCall's call recordings and AI coaching insights to spotlight top-performing moments and share them across the team.

Black Friday is both high-stakes and high-energy. With the right prep, empathy, and automation, your team can turn every rush into lasting relationships and repeat business.