



HOLIDAY GIFT PLAN WORKSHEET

Name	
Company	
Date	
Phone number	
Email	

1. Goals

First, think about what the goals of your holiday giving are. This will help you narrow down who you should give to, how much is reasonable to spend, and the type of gift you want to give. Here are some possible goals you may have:

- Thank customers for patronage during the year
- Thanks for service from your staff
- Retention of customers or employees
- Maintaining your image

2. Recipients

Identify the types of people and the number of each type you need to consider.

Type	Number
Employees	
Clients/Customers	
Suppliers	
Colleagues	
Other	

3. Determine your budget

It's best to spend some time thinking about how much you are willing to spend ahead of time. This will help to control costs rather than buying without a plan and ending up spending way more than you had intended. If you would like, you can break your budget down by type of recipient.

Type	Budget
Employees	
Clients/Customers	
Suppliers	
Colleagues	
Other	
Total	



4. Gift selection

Do you already have a particular gift in mind? Here are some things to think about:

- Do you want to give the same gift to everyone on your list?
- Do you want to select individual gifts for each person or each category of recipient?
- Do you want your gifts to target the special interests of the recipients? (Note that this requires that you know something about the person.)
- Is the gift for an individual or a group of individuals? (For example, consider a gourmet snack basket sent to the office rather than directly to an individual.)



Harmony Gift Baskets has a variety of standard gifts including gourmet food/beverages, gifts for pet lovers, gifts for sports lovers, and bath & body baskets. We will also design custom baskets that will meet your needs and budget.

5. Date required

When do you need your gifts? It's best to think about this early, and order your gifts ahead of time. First, it will ensure that what you want is available when you need it. Second, it will reduce your stress if you are prepared and everything is taken care of before the year-end panic strikes. Third, it can save you money. (See below)

6. Pre-order discounts



Harmony Gift Baskets offers discounts for pre-orders.

Orders received at least two weeks in advance for November or December delivery will be discounted:

Number of gifts ordered	Discount
1	6%
2	10%
3-4	15%
5-9	18%
10+	20%

7. Delivery

- Will you be handing the gifts over yourself?
Handing gifts to the recipients yourself can have a big impact, especially if accompanied by a personal note.
- Will all gifts be delivered to one location?
Delivery of 5 or more Harmony baskets to your place of business is free.
- Will each gift be delivered individually?
Harmony Gift Baskets delivers locally and ships nationwide. Delivery to Mullica Hill is free regardless of number of gifts ordered.

8. Payment

Harmony Gift baskets accepts cash, checks, Visa, MasterCard, Discover, and American Express. Partial or full payment may be required at time of order depending on number and type of gifts ordered.



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EMPLOYEES	COST	GIFT

CLIENTS	COST	GIFT

SUPPLIERS	COST	GIFT

COLLEAGUES	COST	GIFT

OTHER	COST	GIFT