



In-Store Pre Opening Management Planning Checklist

Target Date	Responsibility	Completed	EXECUTIVE PLANNING (4-6 months prior to opening)
			FSI Training Consultant to meet onsite with financial institution (4 to 6 months prior to opening)
			FSI to provide Project Manager's name
			Determine branch hours
			TEAM
			Determine staffing requirements (how many and positions)
			Determine job titles and roles
			Set performance expectations and accountability for each role
			Determine salary ranges
			Identify who will recruit each team role
			Determine dress code for staff
			Determine type of Incentive Plan
			MARKETING BUDGET
			Determine marketing budget for branch
			Determine spending guidelines and approvals
			MARKETING COLLATERAL
			Flyers, handouts, digital content
			Electronic marketing collateral
			IN-STORE MARKETING TOOLS
			Blackboards
			Digital
			GIVEAWAYS AND SWAG
			Branded shopping bags, chip clips, ice cream scoop, shopping list
			Guidelines for distribution and display
			GUIDELINES & LIMITATIONS
			Messaging, branding, and promotion guidelines
			Approval process for new campaigns or materials
			BRANCH SUPPORT & READINESS
			Resources needed from marketing
			Metrics for measuring success
Target Date	Responsibility	Completed	Pre-Opening (2 - 4 months prior to opening)
			Send introductory letter to retail development tenants
			Visit with retail development tenants
			Coordinate opening date and plans with retail development
			Begin recruiting for staff
			Publish employment ads
			Train staff on FI's operations/products
			Order supplies and equipment
			Order Grand Opening giveaways (3 months prior to GO; contact Tina Coleman at FSI for assistance)
			Determine Grand Opening Promotion

			Coordinate with retail development tenants the ability to provide information to store personnel about the financial institution ("Banking-At-Work" day); Participate in store activities, if applicable.
			Banner or sign during building phase, if sign ordinances allow. If store is already open, consider the following: "Coming Soon" in-store signage, grocery bag stuffers, greeters
Target Date	Responsibility	Completed	Pre-Opening (10 days - 2 months prior to opening)
			FSI Training Consultant to conduct a one day In-Store Sales and Service Training (10 days to 2 weeks prior to opening)
			Have a "count-down" sign
			Have a "Coming Soon" banner
			Press release of opening date
			On Blackboard: "5 Key facts about Financial Institution
			IN-STORE TEAM
			Scavenger hunts:
			Have you met, someone in the baker, produce section, cashier
			Locate food items
			Visit local business to give away candy jars (business card in bottom of jar with note) "Call me when you need a refill"
			Write notes to existing members in the area
			A guessing game with a shopping cart full of dry goods wrapped in saran wrap. Guess the total amount of items and the winner wins a store gift card and the food is donated to the local food bank.
			Register for The Smart Cart and complete on-line courses
			RETAIL RELATIONS
			Host meet the in-store team
			Have a weekly Register to win for retail employees
			Crazy hat day - for either the retail employees and in-store team
			Use store items for give-aways such as gift cards and gift baskets
			Branch team walk through store to meet staff
			Determine a special account for store employees
			Share branch opening information with store management
			Print and/or broadcast ads
			Statement stuffers
			Direct mail
			Obtain helium tank for branch, if desired
Target Date	Responsibility	Completed	Soft Opening
			"NOW OPEN" signage/banners
			Retail development business development
			Informational flyers
			Greeters - Additional team members for support
			Promotional items (balloons, chip clips, pens, etc)
			Product promotion
			Begin promotion for Grand Opening
			Store mangement involvement and support
			Special activities (raffles, spin the wheel, kids activities

			Social media plan and photo opportunities
			Follow-up plan (lead tracking, calling, thank you messaging)
Target Date	Responsibility	Completed	10 days prior to Grand Opening
			Send out Ribbon Cutting Ceremony Invitations; ribbon may be made up of money to be donated to local charity.
			Press release for Grand Opening Celebration
			Print and/or broadcast ads for Grand Opening
			Grand Opening signage
Target Date	Responsibility	Completed	Grand Opening (4 weeks after Soft Opening)
			Ribbon Cutting Ceremony (board members, retail managers, local dignitaries should be invited)
			Product promotions
			Refreshments
			Promotional items
			Microphone & amplifier, if needed
			Contests/giveaways
			Extra associates from financial institution to assist
			Branch decorations
			Photographer/Video