LIVE SALE PLANNING & EXECUTION CHECKLIST

STRATEGY & PRE-SALE PREP

- ☐ Define your goal (sales, awareness, engagement, etc.)
- ☐ Identify your target audience
- ☐ Choose your platform (Instagram Live, TikTok, Facebook, Shopify, etc.)
- ☐ Select featured products (new arrivals, bestsellers, bundles, etc.)
- ☐ Set pricing strategy (discounts, limited offers, free shipping, etc.)
- ☐ Plan your script or flow (intro, product rundown, CTAs, close)
- ☐ Create a promotion timeline (email, SMS, stories, countdowns)
- ☐ Prep links or comment claims for fast checkout

SETUP & ENVIRONMENT

- ☐ Test lighting (natural light or ring light setup)
- ☐ Position your camera or phone at the right angle
- ☐ Clear and clean your background or use a branded backdrop
- ☐ Check Wi-Fi and stream stability
- ☐ Set up audio (use a mic if needed, avoid background noise)
- ☐ Have products organized and nearby for easy access

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AUDIENCE ENGAGEMENT

- ☐ Greet and welcome viewers by name
- ☐ Show each product clearly on camera
- ☐ Demonstrate product use if relevant
- ☐ Read and respond to live questions/comments
- ☐ Use urgency drivers (low inventory alerts, countdowns, etc.)
- ☐ Highlight pricing and call out deals as you go

CHECKOUT & ORDER MANAGEMENT

- ☐ Have a clear process for how customers claim/purchase
- ☐ Drop checkout links or codes in the chat
- ☐ Monitor orders as they come in (live dashboard or notepad)
- ☐ Confirm payment systems are working smoothly
- ☐ Be ready to address common questions (shipping, sizing, returns)

POST-SALE FOLLOW-UP

- ☐ Send confirmation or thank-you emails/messages
- ☐ Post "thank you" content on your social channels
- ☐ Encourage customers to tag you or share unboxings
- ☐ Collect feedback or reviews
- ☐ Review sales performance and viewer engagement metrics
- ☐ Note lessons learned and improvements for next time

**Dasha Randlett
Consulting**