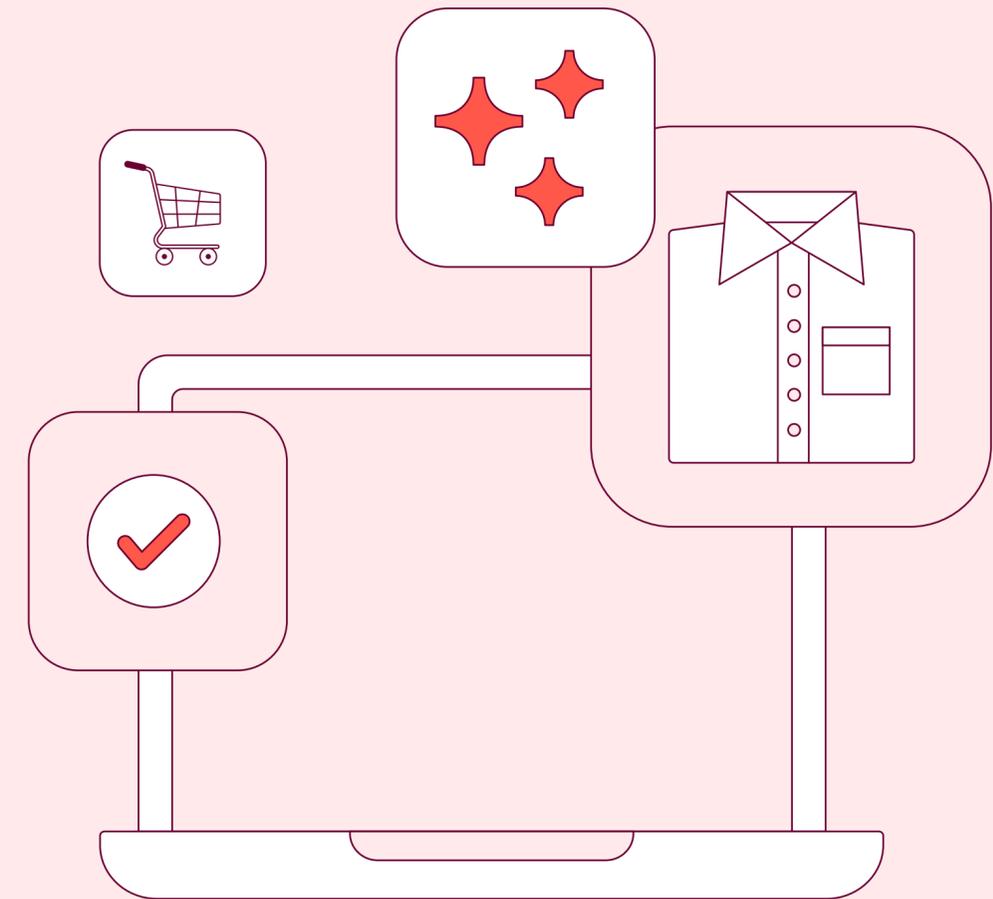


The retail marketer's peak season playbook

Practical retail processes and AI workflows to cut chaos, ship faster, and win every season



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Navigate the high-stakes reality of retail marketing

Retail marketing teams face relentless pressure to deliver: fast, flawlessly, and at scale. As campaigns stretch across more teams and customer touchpoints, delivery gets more complex, timelines get tighter, and expectations climb across every channel, from digital to in-store.

By late summer, peak holiday plans might be “final,” but in retail, final rarely means finished. Pricing changes. Products sell out. Promotions shift. Creative priorities get reshuffled. And when one piece moves, everything else has to adjust.

Planning alone doesn’t win the season. Execution does—and it has to be built for change.

This isn’t a planning guide, it’s a toolkit for executing high-stakes, high-volume work

In retail, execution makes or breaks performance. To deliver during the busiest months, teams need workflows that flex under pressure and adapt as priorities shift.

This playbook is for retail marketers and their partners in brand, creative, merchandising, and store ops—anyone responsible for bringing campaigns to life when the stakes are high. Whether you’re focused on holiday promotions, launching seasonal campaigns, or scaling what works year-round, the goal is the same: stay aligned, move fast, and deliver without disruption, even when plans change.

Use it:

- During peak season to stay coordinated, respond to changes in real time, and cut manual work when time is tight
- Afterward to create reusable workflows, streamline cross-functional work, and scale success across teams or regions

When systems can't scale, campaigns stall

Today's campaigns span more channels, teams, and partners than ever. But too often, the systems behind them haven't caught up. Many retail organizations still rely on scattered tools and disconnected workflows to get campaigns over the line. Strategic plans live in decks; daily work happens in inboxes; teams work in parallel, but not always in sync.

These manual tools and siloed communications create friction at the exact moment retail marketing teams need to be fast and coordinated. Without a shared approach to marketing campaigns, teams face:

- Missed deadlines and duplicated work across cross-functional teams like creative, merchandising, and store ops
- Fire drills triggered by last-minute changes to pricing, promotions, or product availability
- Brand inconsistency across regions and channels
- Delayed launches due to lack of visibility into handoffs and approvals
- Burnout and inefficiency when performance stakes are at their highest

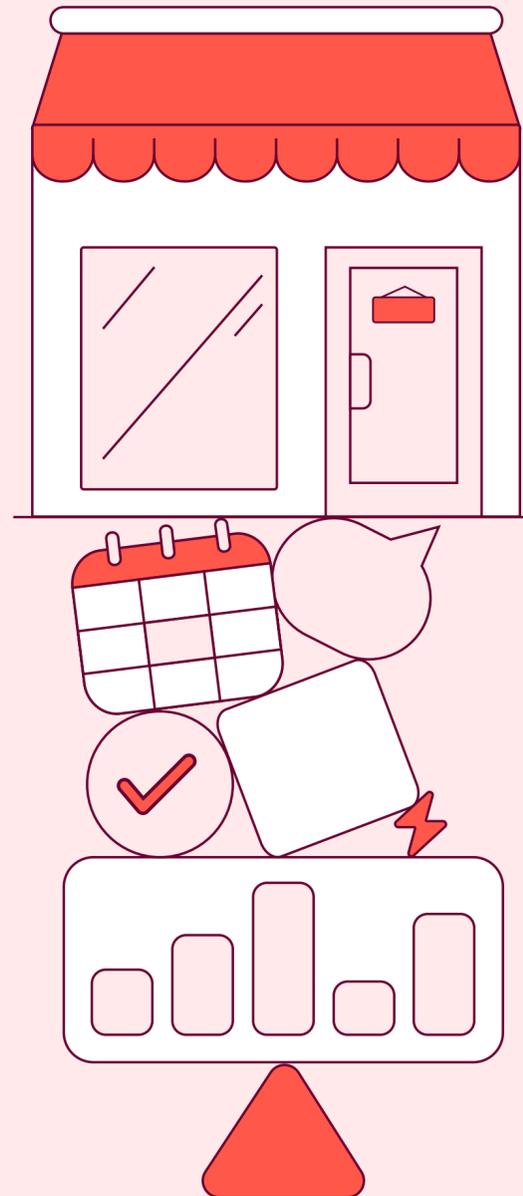
Common operational challenges in retail (and where they show up)			
Challenge	Where it happens	Impact	Solution
Fragmented campaign execution	Multi-channel campaigns with scattered timelines and assets	Missed deadlines, inconsistent messaging	Centralize timelines, assets, and approvals to deliver consistent, on-brand campaigns faster
Complex product launches	Cross-functional coordination across marketing, merchandising, and supply chain	Delayed launches, misaligned promotions	Use connected launch workflows to align every team from concept to shelf
Delays to store openings	Coordination across construction, staffing, marketing, and vendors	Cost overruns, opening-day issues	Standardize store opening processes and track progress in one shared system
Disconnected inventory & promo planning	Merchandising, marketing, and logistics misaligned on stock levels	Overselling, missed sales opportunities	Create real-time visibility into inventory health to align promotions and availability

This is your companion for the busiest months, and a foundation for what's next

Retail teams need systems that centralize campaign work, cut manual effort, and adapt in real time. The most successful teams don't just build plans; they design processes that scale and flex under pressure.

With the right approach, teams can:

- Navigate shifting timelines without losing momentum
- Coordinate seamlessly across in-store teams, vendors, and external partners
- Connect strategy to implementation so every stakeholder knows what's ahead
- Create consistent customer experiences across online and offline channels
- Respond quickly to last-minute changes without sacrificing quality or control
- Build reusable campaign processes that scale across teams and regions
- Deliver reliably, even when campaign plans change



When every channel, team, and partner is connected in one place, peak season doesn't mean peak stress.

Run integrated retail campaigns

Today's most effective retail campaigns are omnichannel by default. From paid ads and emails to in-store signage and seasonal displays, every element needs to work together to create a seamless customer experience.

Behind the scenes, these campaigns create significant operational complexity. Retail marketers are tasked with coordinating dozens of moving parts across internal teams, external partners, and customer-facing channels—often while juggling overlapping timelines, evolving creative, and last-minute promotional changes.

When timelines, briefs, and approvals are scattered across tools and threads, teams fall out of sync. Reviews stall, messaging drifts, and performance suffers.

Getting it right takes more than a campaign calendar. During high-volume, high-pressure seasons, retail teams need to streamline operations by bringing together timelines, content, approvals, and collaborators in one place—so they can move faster, respond in real time, and deliver with consistency across every channel.



Streamline campaigns across every channel and partner

- Coordinate campaigns, channels, and regions in one shared platform
- Centralize timelines, assets, and approvals to prevent bottlenecks and duplicate work
- Standardize creative requests with forms, and streamline reviews from start to finish
- Automate routine check-ins and reporting to keep momentum high and manual work low
- Connect campaigns to brand goals, revenue targets, and key performance metrics
- Adapt quickly to seasonal surges, industry trends, or real-time customer feedback
- Track performance and make real-time adjustments, like updating messaging or extending promotions, without disrupting the overall campaign plan
- Use Asana AI to craft status updates and flag blockers, and AI Studio to automate campaign workflows end-to-end

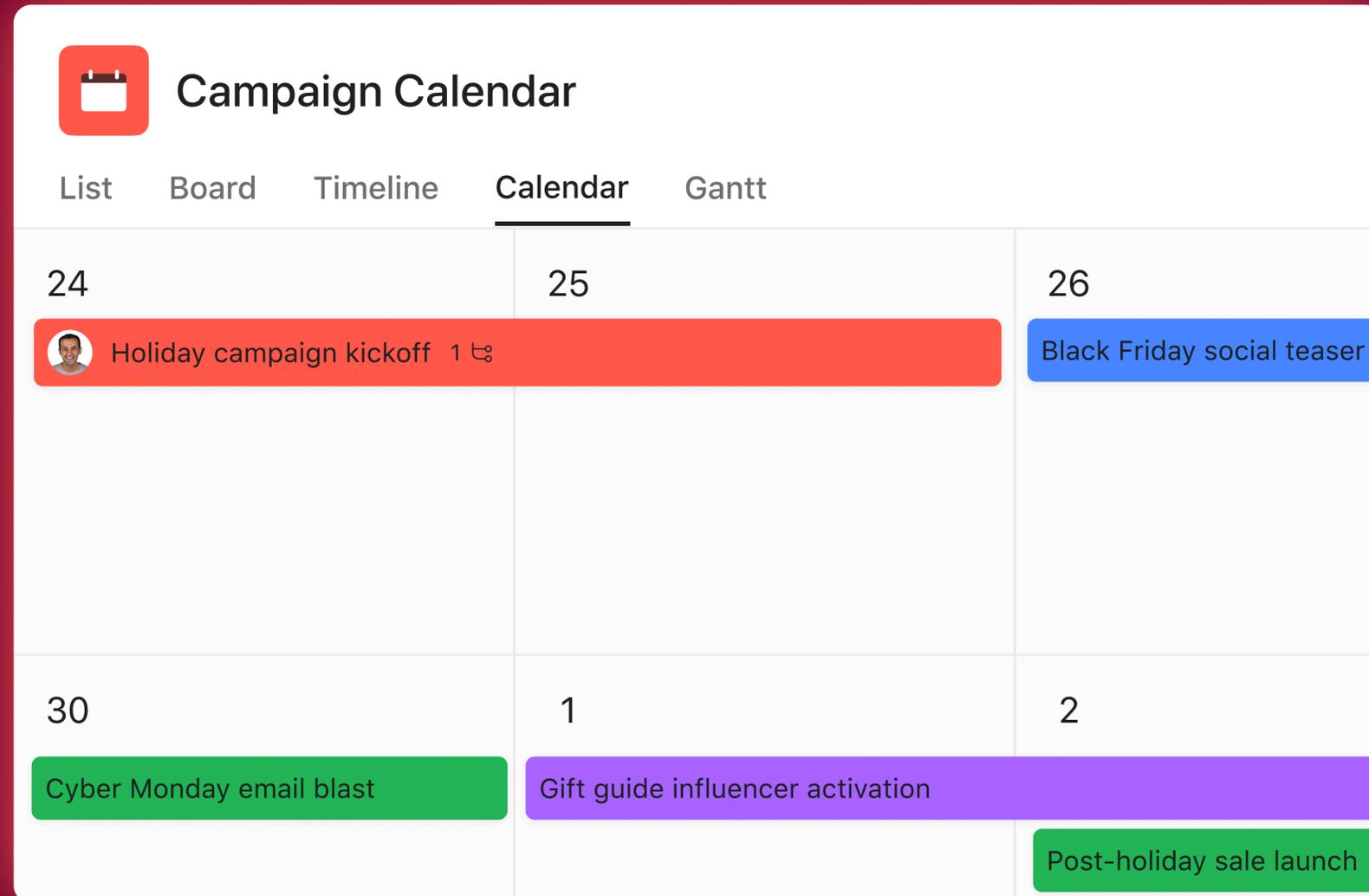
Coordinating integrated retail campaigns

How KENDO scaled cross-channel marketing

KENDO

KENDO's marketing and digital teams manage complex campaign activations like launching new products and promotional campaigns. But with teams using disconnected tools and workflows, coordination was slow, visibility was limited, and work often happened in silos.

Today, the team uses Asana as a central hub, coordinating digital activations from planning through launch and aligning content and messaging across channels. Asana serves as their single source of truth, where teams can track tasks and milestones, and ensure every activation goes live on time and on message.



KENDO uses Asana to:



Connect every activation in one view

A shared digital calendar connects every team's individual calendars in one unified view, so everyone knows what's launching and when.



Follow a consistent campaign process

Templatized workflows ensure nothing is missed during campaign execution, giving the team a repeatable process for planning and delivering activations.



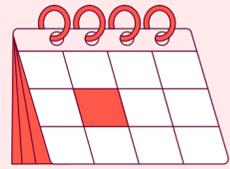
Gain real-time visibility to move work forward

A central platform allows teams to see the full scope of work in real time, making it easier to prioritize, collaborate, and keep campaigns on track.



Streamline approvals and decision-making

Centralized communication and visibility speed up approvals, helping leaders make quick decisions that unblock work.



87 workdays saved annually that were previously spent coordinating work



58% increase in time saved year over year as Asana adoption expanded



Increased campaign impact through centralized planning

“

We're now able to align our content and messaging across channels to launch more impactful digital activations thanks to our streamlined workflows and digital calendar in Asana.

Julia Ball
Senior Project Manager, Digital & Content
KENDO

Launch new products with speed

Product launches are high-stakes moments for retail teams. Behind every successful release are months of coordination and carefully timed handoffs between teams, suppliers, and creative partners.

From packaging and pricing to creative, merchandising, and in-store rollout, launches require tight coordination across multiple teams, often on compressed timelines that shift at the last minute. Supply chain delays, packaging changes, or pricing adjustments can set off a chain reaction that impacts the entire launch. Without shared visibility, teams lose time chasing updates, duplicating work, or missing dependencies entirely.

When a delay in one area stalls the whole launch, momentum gets lost in manual coordination. These breakdowns can reduce speed to market, impact promotional accuracy, and hurt sales.

To stay on track, retailers need flexible, connected systems that keep everyone, from product to store operations, aligned on what's happening, what's changing, and what's next.



Build flexible, cross-functional launch systems

- Manage launches from concept approval to in-store availability in a central hub
- Coordinate seamlessly across design, production, marketing, and regional teams in a connected view
- Manage multi-channel timelines for in-store, online, and wholesale launches without losing momentum when plans shift
- Track pre-production work like sample development, photo shoots, lookbooks, and creative assets in one place
- Standardize product intake requests to quickly adjust details like pricing or positioning
- Spot blockers before they delay go-to-market timelines
- Use Asana AI to monitor progress and summarize updates automatically, and AI Studio to generate structured launch briefings
- View all active launches in one portfolio, with visibility into milestones, priorities, and strategic goals

Driving fast product launches

How Beauty Pie manages 100+ product launches a year

BEAUTY PIE

Beauty Pie manages more than 100 new product launches annually—each involving long timelines, shifting requirements, and deep collaboration across product development, marketing, regulatory, packaging, and supply chain teams.

Before Asana, fragmented tools and inconsistent workflows made it hard to stay on track. Tasks weren't clearly assigned, responsibilities were unclear, and leadership had limited visibility into timelines and risks.

Today, Beauty Pie uses Asana to manage the entire product launch lifecycle. Standardized workflows, real-time visibility, and clear ownership keep launches on schedule, even as complexity grows.

Task name	Priority	Department	Due date	+
▼ Planning ⚡				
✓ Finalize gift set formula	High	Product Dev	Nov 14	
✓ Approve marketing brief	High	Marketing	Nov 20	
▼ Production				
✓ Begin compliance checks	High	Regulatory	Dec 2	
✓ Schedule themed photoshoot	Medium	Creative	Dec 5	
▼ Launch				
✓ Publish new product detail page	Medium	Web	Jan 6	
✓ Launch marketing campaign 2 👍 2 💬 2 🗨️	High	Marketing	Jan 13	

Beauty Pie uses Asana to:



Standardize product launch workflows

Templates ensure consistency across launches, reducing upfront work and helping teams deliver products to market on time.



Assign clear ownership to keep work moving

Task owners and dedicated launch boards ensure accountability and make it easy for teammates to step in when someone is out.



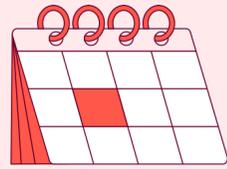
Keep launch timelines on track

Teams track key milestones and dependencies for all product launches, giving leadership and contributors real-time visibility into project status.

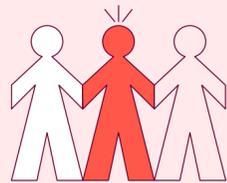


Focus on high-impact work

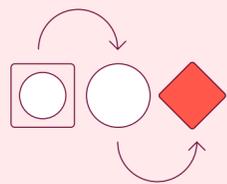
Custom fields highlight top priorities, so teams can concentrate on critical tasks and deliver on time.



444 workdays saved, resulting in an estimated cost savings of \$124,600



61% increase in cross-functional collaboration, improving coordination across departments



Over 100 product launches managed each year with standardized workflows that keep timelines on track

“

As a small business managing a high volume of intricate projects, we needed a way to handle that complexity. With Asana, our teams can access exactly what they need across hundreds of projects, so everyone knows what to do and by when—keeping our launches on track.

Katie Sissons
Senior Programme Manager
Beauty Pie

Streamline new store openings

Few retail initiatives demand as much hands-on coordination as opening a store. These launches span departments, partners, and systems, making alignment a constant challenge. From real estate and construction to marketing, merchandising, and staffing, successful launches require tight coordination across dozens of teams, often working on separate timelines, in different tools, and across multiple regions.

Some milestones are fixed, like signage installs or build-out completion. Others are ongoing, like onboarding new staff or rolling out in-store training. Without a central system to manage the full scope, details slip through the cracks. Teams rely on email threads, spreadsheets, or disconnected trackers to stay updated, and when one group misses a deadline, the entire opening can be delayed.

These setbacks don't just affect opening day. They can derail growth goals, impact revenue forecasts, and hurt the customer experience in new markets.

To scale store openings with less stress and more consistency, retail teams need a standardized approach that brings every stakeholder into one system, with clear timelines, task owners, and the flexibility to adapt as needed.



Standardize store launch operations across markets

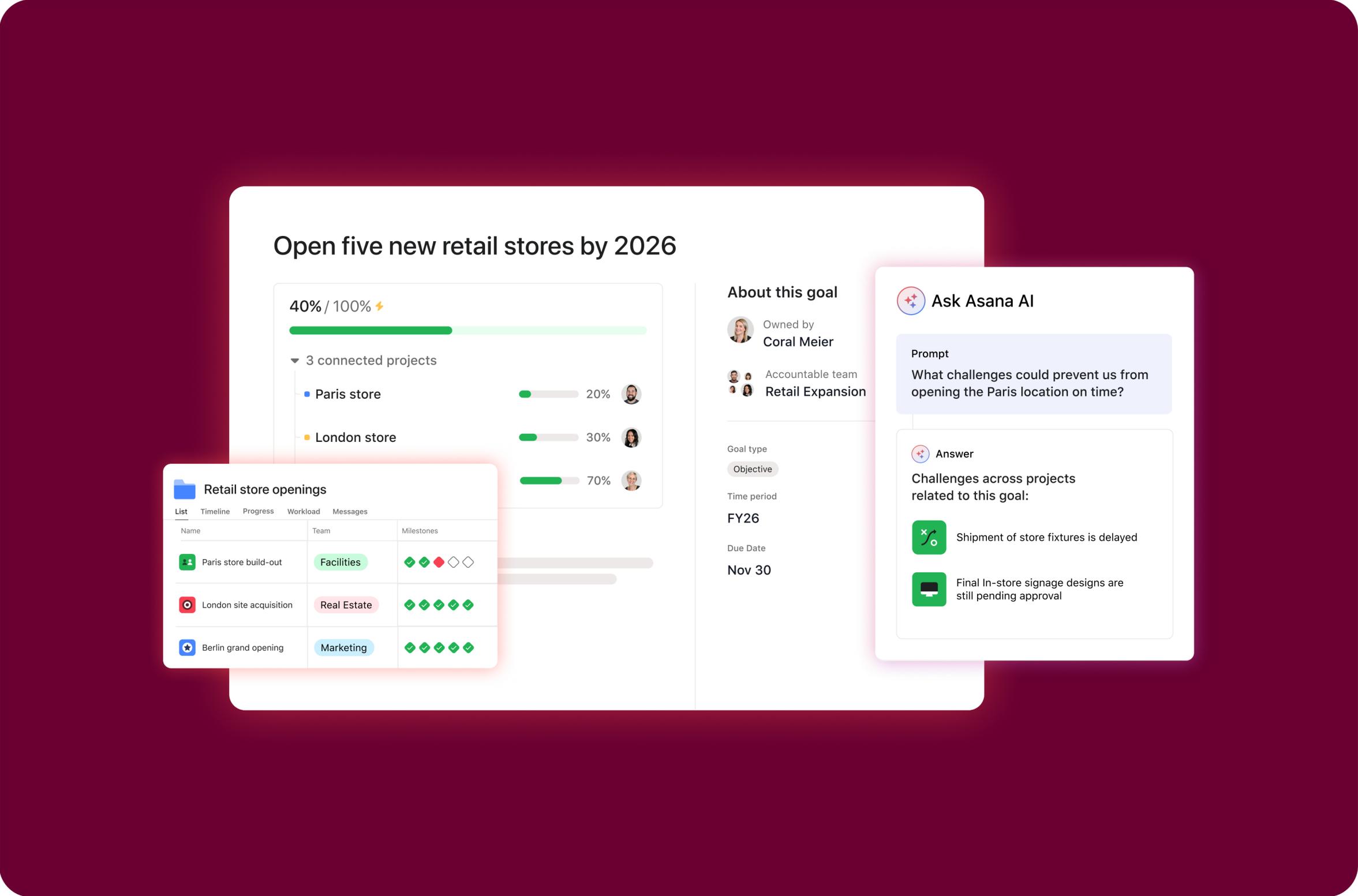
- Manage every aspect of store openings, from inventory planning and merchandising to supplier coordination, in connected one system
- Align tasks across internal and external teams (real estate, construction, marketing, staffing, operations) with reusable, custom templates
- Centralize vendor communication and access with integrations like Outlook
- Maintain brand consistency with shared briefs, standardized checklists, and a central platform for creative assets
- Track critical tasks like inventory setup, signage installation, onboarding, and staff training in one place
- Manage staffing across sites with capacity planning
- Assign owners and due dates to improve accountability and avoid delays across departments
- Automate recurring steps like onboarding checklists, asset approvals, and launch milestones to save time
- Collect and route requests, such as site updates, change orders, or approvals, via forms to ensure they reach the right team quickly
- Use AI Studio to streamline supplier workflows, compile vendor information from pre-built lists, and flag missing inputs
- Monitor cross-functional progress in real time with reporting dashboards, surface risks early, and generate AI-powered store readiness summaries

Delivering smooth store openings

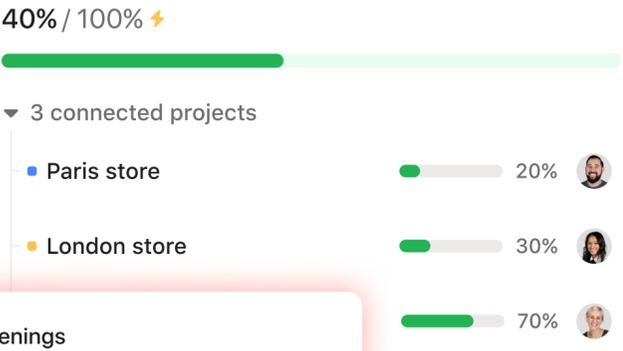
How retail teams open new locations on time

Opening a new retail store involves hundreds of moving parts—from construction and permitting to merchandising, staffing, marketing, and supplier coordination—all on tight timelines. Without a clear process and real-time visibility, delays snowball, costs rise, and brand consistency suffers.

With Asana, retailers manage every stage of a store opening in one place. Teams align around a single plan and timeline, spot risks early, and keep internal teams and external vendors in sync. AI-powered automation, real-time updates, and integrated tools help move work forward faster, so every location opens on time, on brand, and ready for customers.



Open five new retail stores by 2026



Retail store openings		
Name	Team	Milestones
Paris store build-out	Facilities	✓ ✓ ✖ ○ ○
London site acquisition	Real Estate	✓ ✓ ✓ ✓ ✓
Berlin grand opening	Marketing	✓ ✓ ✓ ✓ ✓

About this goal

Owned by Coral Meier

Accountable team: Retail Expansion

Goal type: Objective

Time period: FY26

Due Date: Nov 30

Ask Asana AI

Prompt: What challenges could prevent us from opening the Paris location on time?

Answer: Challenges across projects related to this goal:

- Shipment of store fixtures is delayed
- Final In-store signage designs are still pending approval

Retail teams use Asana to:



Align every team on a single opening plan

Portfolios provide a central view of all store openings, with real-time tracking of progress, budgets, and key milestones.



Streamline vendor and supplier coordination

Outlook or Gmail integrations turn emails into trackable tasks and store all vendor documents in one place.



Standardize processes for consistency

Templates create structured workflows that ensure each store opening follows the same steps and meets company requirements.



Spot and resolve risks before they cause delays

AI Studio flags potential issues, like supplier disruptions, and automatically routes them to the right owner with clear next steps.

Improve inventory and promotional planning

Retail promotions move fast, but inventory doesn't always keep up. Success depends on having the right products in the right place at the right time—and coordinating those moving parts across merchandising, marketing, logistics, and store operations requires tight coordination across teams and timelines.

This operational complexity grows when marketing and merchandising teams lack real-time visibility into product availability, stock levels, or regional differences. Store managers and frontline teams may spot issues early, but without a clear process to flag urgent needs, those updates can get buried in back-and-forth messages or never reach the right teams in time.

When planning happens in isolation from supply chain or store ops, teams risk promoting out-of-stock items, misaligning in-store and online offers, or rolling out pricing that doesn't reflect real-time conditions. These breakdowns can reduce customer trust, impact revenue, and put extra strain on already stretched teams.

To make sure offers match inventory, retailers need a shared system that gives everyone the visibility, structure, and speed to respond in real time.



Create real-time visibility into inventory and promotional work

- Centralize intake of inventory or stock shortage requests across store locations
- Use forms to collect key details, like SKU, location, urgency, and timing, in one step
- Streamline communication between merchandising, logistics, store operations, and external vendors
- Track progress from request to resolution with clear status, ownership, and timelines
- Prioritize work using custom fields for urgency, region, supplier, budget impact, and other key factors
- Manage short-term fixes, reorders, and long-term redistribution plans in a single portfolio
- Attach purchase orders directly to related tasks for quick tracking and confirmation
- Use AI Studio to detect missing details in requests and prompt submitters to fill them in automatically
- Create AI-powered status updates to keep stakeholders aligned on stockouts, supply issues, or promotional readiness

Optimizing inventory management

How The Citizenry streamlined inventory tracking across channels

THE CITIZENRY

The Citizenry's product development, design, and production teams often manage up to ten product launches at once, with each one involving around 100 tasks and dozens of stakeholders. As the company scaled, managing launches and inventory through spreadsheets led to delays, missed steps, and time-consuming updates across multiple tools.

With Asana, The Citizenry tracks new product development, launches, and inventory in one shared system. Standardized workflows, project templates, and clear timelines help keep teams aligned, improve visibility, and speed up delivery.

Inventory update form

Add form description

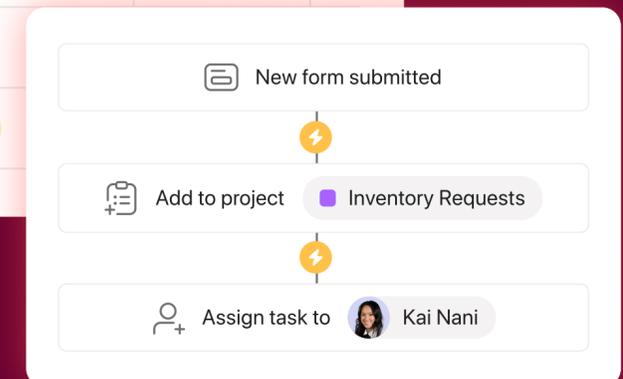
Product name *

Product SKU *

Stock status *

Inventory tracking

Task name	Product SKU	Stock status	Store location	
✓ Moroccan wool rug	SKU-2219	Low	Manhattan	
✓ Linen pillow set	SKU-5498	Restock needed	Austin	
✓ Handcrafted ceramic vase	SKU-9101	Out		
✓ Teak wood serving tray	SKU-1112	Low		



The Citizenry uses Asana to:



Track inventory-related issues alongside launch plans

Dedicated projects help teams monitor stock concerns and improve handoffs across product development, fulfillment, and e-commerce.



Centralize timelines and responsibilities

Clear timelines, visibility into dependencies, and visible project statuses minimize the need for extra check-ins or duplicate updates.



Scale launches without sacrificing consistency

Project templates and team-built workflows support consistent delivery, even as new team members join or launches increase.



60% increase in feedback speed
on inventory issues



Fewer missed ship dates and oversold items



More pre-sale opportunities for items
previously marked "out of stock"

“

We have been able to reduce the number of products that we've oversold and the number of times we have to contact the customer to push a ship date out.

Andrea Georgi
E-Commerce Director
The Citizenry

Enhance retail operations with AI

In retail, even small delays or missed details can impact customer experience and revenue. Asana AI and AI Studio help teams work faster and smarter, automating routine tasks, surfacing the right information at the right time, and giving everyone the context to make confident decisions.



“

The ability to surface insights across applications with Asana AI will revolutionize how we launch products and campaigns.

Adam Kite
VP of Brand, Content, & Marketing Operations
Relex

How retail teams use Asana AI

Get instant clarity

Generate AI-powered status updates to share progress on store openings, campaigns, or product launches, no manual reporting required.

Summarize and share updates in seconds

Automatically create briefings, inventory updates, or campaign summaries so stakeholders stay aligned without chasing details.

Launch holiday 2025 campaign

50% / 100% ⚡

3 connected portfolios

- HC25 creative production 
- HC25 omnichannel media plan 
- HC25 in-store merchandising rollout 

 Draft with Asana AI

 Generating status report...

 On track

Summary

The holiday campaign is progressing as planned, with key creative assets approved and distribution scheduled. Regional store teams have confirmed readiness for in-store displays, and vendor shipments remain on schedule. No major risks identified at this stage.

How retail teams use AI Studio

Prioritize and act on incoming requests

Capture new requests, flag incomplete submissions, gather the details needed to start work, and route them to the right owner automatically.

Streamline campaign and launch execution

Turn scattered inputs, like notes, emails, and documents, into structured briefs, suggest the right reviewers, and ensure creative assets meet brand standards before launch.

Plan campaigns with precision

Conduct market research, generate campaign and launch timelines, and assign tasks instantly.

The screenshot displays the AI Studio interface for a workflow titled "Request quality check". At the top right, there is a toggle switch labeled "AI Studio" which is currently turned on. The workflow is visualized on a light orange background with a dotted pattern. It consists of three main components: 1. A "Check if" step: A white box with a star icon containing the text "Check if Inventory request is missing information". 2. A "Do this" step: A white box with a speech bubble icon containing the text "Do this Add comment" and a blue "Use AI" button with a plus icon. 3. A "Create with AI" step: A white box with a star icon containing the text "Create with AI". Below this, a light blue box contains the instruction: "When an inventory request is submitted, check if it includes all required details. If anything is missing, prompt the requester to add the information." followed by a red curly bracket icon.

Turn seasonal wins into year-round momentum



Peak and holiday seasons might define retail's busiest moments, but the work doesn't stop when the sales end. Whether you're running campaigns, launching products, opening stores, or keeping promotions and inventory in sync, retail success depends on more than great ideas. It takes connected systems, clear ownership, and the ability to adapt quickly when priorities shift.

When you have the right system in place, the same structures that get you through the busiest months can set you up for year-round success. With standardized workflows, shared visibility, and automation working together to help teams move quickly and adapt with confidence, you can deliver seamless experiences that build customer loyalty and drive growth—in every season.

Turn high-stakes retail work into results

Discover how Asana helps retail marketing teams deliver seamlessly across every channel and season

Explore more

Talk to our team

Get a personalized look at how Asana can support your retail marketing teams

Contact sales

