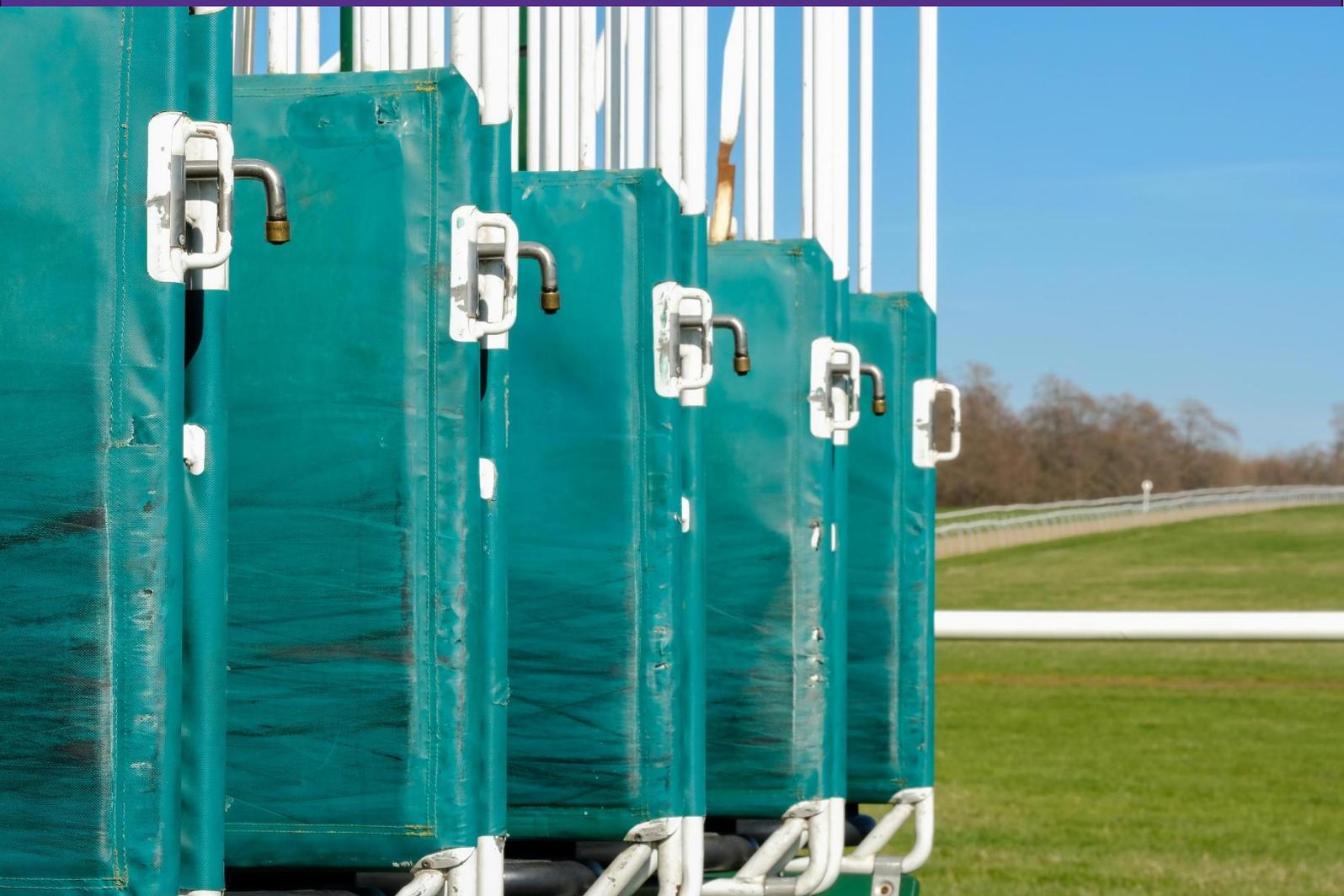




The Essential Cheltenham CRM Checklist



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INTRODUCTION

With just a few weeks until the Festival, the strategic planning is done. Now it's about execution.

This checklist translates your Vision & Strategy into operational readiness. It's the unglamorous but critical groundwork that aligns your Technology, Processes, Data, and People to stop chaos, protect revenue, and ensure your CRM performs when it matters most.

We've identified seven operational priorities that you must ensure are in place across your CRM & Technology stack.



PRIORITY 1

Test Channel Deliverability

Aligning **Technology & Platforms** with demand.

Verify your messages will land and that you're covered for the surge.

Test Deliverability & Throughput

- **Email** - Run a basic deliverability audit (domain health, spam traps). Pre-warm any IPs and test rendering across all major email clients.
- **Push & SMS** - Validate gateway burst capacity and aggregator limits. Simulate peak volume to avoid throttling.
- **Vendor Readiness** - Confirm key providers' infrastructure plans for the traffic peak. Ensure they are not implementing shared throttling or maintenance during critical windows.

PRIORITY 2

Contracted Volumes

The Festival is one of the most active periods in the Horse Racing and Betting Calendar, increasing the number of active customers, and service messaging. Check your **Technology & Platforms** have capacity to manage the increase.

Confirm Contracted Volumes & Costs

- **Credits & Caps** - Triple-check that your vendor contracts have enough pre-paid SMS credits and email/push volumes to cover the entire festival surge. Do not rely on goodwill.
- **Overage Clarity** - Understand the exact cost and process for exceeding your limits. Clarify this in writing now to avoid a post-event invoice that erodes your campaign ROI.

PRIORITY 3

Agree Your Plan B

Building resilience into your **Process & Operations**.

Cheltenham is unpredictable. Your CRM shouldn't be.

- **Pre-Approved Templates** - Have pre-approved templates ready for race abandonment, streaming outages, site issues, or a void market.
- **Fast-Track Sign-Off** - Decide who can sign off urgent comms in under 30 minutes if things go wrong.
- **Backup Channels** - Identify your fallback if your primary channel fails.

PRIORITY 4

Define Who Fixes Things

Clarifying **People & Organisation** roles for rapid response.

When something breaks at 1:25pm, you need a clear path, not a chat thread.

- **Internal Ownership** - Map out who is responsible for resolving channel outages, data feed failures, and payment issues.
- **Vendor Escalation** - Confirm a named contact and emergency number for each key provider, and ensure you have access to support portals.
- **Single 'Who to Call' Sheet** - Create a one-page contact list for CRM leads, trading, tech, and vendor contacts. Make sure it's accessible offline.

PRIORITY 5

Validate Campaigns & Links

Ensuring **Process & Operations** integrity under load.

Test that your automated journeys are ready and every link lands.

- **Journey Integrity** - Simulated high-volume events. Factor in the increased load on welcome emails and new customer journeys with the key acquisition moment.
- **API Trigger Reliability** - Confirm that real-time triggers, such as password resets are stable and can handle volume without delay.
- **Link & Deep Link Testing** - Check that every link resolves correctly on iOS, Android, and desktop.
- **Journey Management** - Pause any non-essential or conflicting automated journeys for the festival duration to avoid message fatigue and protect system capacity.

PRIORITY 6

Secure Your Data Foundations

Solidifying **Data & Insight** flow and compliance.

Confirm your information is accurate, timely, and protected.

- **Overnight Processing** - Validate batch jobs such as updating segments can handle the increased data volume and complete on time before morning sends.
- **Ad-Hoc Data Needs** - Identify any reports or data pulls required during the festival. Confirm the source, format, and delivery timeline with your data/BI team now.
- **Self-Exclusion Synchronisation** - Ensure CRM suppression logic updates in near real-time to mitigate compliance risk.

PRIORITY 7

Lock Down Your Plan

No last-minute surprises.

- **Freeze & Finalise** - Set a hard freeze for new CRM templates 48 hours before Day 1. Finalise all content, segments, and send times.
- **Quality Control Process** - Review and streamline your QC checklist. Ensure it's robust enough to catch critical errors but efficient enough for the festival pace. Confirm who is performing QC and that they have dedicated time in the schedule.
- **Internal Comms** - Brief your customer support and trading teams on all planned comms, offers, and expected timings. Provide them with offer FAQs and escalation paths.



SUMMARY

Cheltenham is one of the biggest betting events of the year. Don't let meticulous planning be undone by an overlooked operational detail.

Running these checks provides more than just peace of mind, it's how you **turn strategic vision into flawless execution**. It protects your ROI and lets you find a moment to enjoy the racing.

Need a second pair of eyes?

We specialise in helping operators align their **strategy, technology, data, process, and people** for peak-performance moments like Cheltenham. From audits against this checklist to hands-on crisis management, we're here to ensure your campaign runs smoothly.

If you'd like to discuss how we can help, get in touch.





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