

JA Company Program® Pop-Up Checklist

The Pop-Up Planning Checklist is intended to be used for laying out the program and ensuring all responsible parties know their tasks and their appropriate time frames. The Volunteer column is to be completed by volunteers and educators together to aid in planning.

PRE-PROGRAM

Timeframe	Task	Area	Educator	Student	Volunteer
	Attend training and determine necessary next steps to launch program.	✓	✓		
	Set up bank account for business sales and expenses or prepare to run business through school store. (could be either party)	✓	✓		
	Provide start up funds. (could be either party)	✓	✓		
These tasks can be done with students' input at the beginning of the program or in during pre-program preparation.	Determine business and monetary goal.		✓		
	Define the pop-up business focus.		✓		
	Determine the proceeds recipient.		✓		
	Determine how funds will be allocated.		✓		
	Send in product approval application to USI (only if determining business and logistics before program starts).		✓		
	Determine acceptable payment types. Provide necessary equipment and/or logistics to set up those payment types.		✓		
	Identify product vendors and establish relationship for production and delivery.	✓			
	Set up social media accounts for students to use in program advertising (if applicable).		✓		

DURING PROGRAM

Timeframe	Task	Area	Educator	Student	Volunteer
 Plan Phase					
Meeting One	Identify business goals and personal business strengths.			✓	
Meeting One	Record the desired profit goal for the pop-up business on the Profit worksheet.			✓	
Meetings One-Three	Order products from vendor.		✓		
During/After Meeting Two	Research the target audience (customers) and product(s).			✓	
Meeting Three	Determine the company structure and identify the necessary roles and responsibilities in the business.			✓	
Meeting Three	Create a business name and develop branding, if appropriate.			✓	
Meeting Four	Determine the pop-up store location.			✓	
Meeting Four	Determine pop-up store dates and hours of operation.			✓	
Meeting Four	Identify pop-up store needs (e.g., electricity, Wi-Fi access).			✓	
Ongoing	Use the Pop-Up Financials workbook to record information on the noted worksheets.			✓	
Ongoing	Record the pop-up's expenses in the Expenses worksheet.			✓	
Meeting Five	Determine product price to achieve desired profit.			✓	
Meeting Five	Add price per unit to the Sales Tracking worksheet.			✓	


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Timeframe	Task	Area	Educator	Student	Volunteer
Meeting Six	Determine transaction types for the pop-up and coordinate the starting cash box.			✓	
Meeting Six	Record starting cash in the Profit worksheet.			✓	
Meeting Six	Record the pop-up expenses in the Expenses worksheet.			✓	
During/After Meeting Six	Perform quality assurance (QA) on products to ensure quality.			✓	
During/After Meeting Six	Train staff for pop-up business operations.			✓	
During/After Meeting Six	Determine staffing schedule for pop-up store.			✓	
 Promote Phase					
Meeting Three	Tally students' market research (before or during class time, as time allows).			✓	
Meeting Four	Brainstorm the store setup.			✓	
Meeting Four	Determine product displays.			✓	
During/After Meeting Four	Create store signage.			✓	
Meeting Five	Determine promotional strategies and advertising methods.			✓	
Meeting Five	Coordinate social media posts with instructor.			✓	
Meeting Five	Determine time-release campaign for social media reminders.			✓	


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Timeframe	Task	Area	Educator	Student	Volunteer
Meeting Five	Decide how to distribute promotional materials according to the store schedule.			✓	
Meeting Five	Calculate a profitable price and strategize promotion of the business.			✓	
Meeting Five	Draft wording for product signage.			✓	
During/After Meeting Five	Create print advertising and determine format(s) (e.g., fliers, posters, brochures).			✓	
During/After Meeting Five	Create social media and determine format(s) (e.g., Facebook, Instagram, Twitter, website, vlogs).			✓	
During/After Meeting Five	Plan other promotions (e.g., school announcements, community bulletin boards, school radio/TV).			✓	
Before Meeting Six	Set up the physical/virtual pop-up storefront.			✓	
 Run Phase					
Before/After Meeting Six	Launch the business and practice successful sales and customer care techniques.			✓	
Before/After Meeting Six	Manage product inventory.			✓	
Before/After Meeting Six	Track product inventory.			✓	
Before/After Meeting Six	Record starting inventory on the Sales Tracking worksheet.			✓	

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Timeframe	Task	Area	Educator	Student	Volunteer
 Close Phase					
Meeting Seven	Close out the business and analyze the business results and associated goals.			✓	
Meeting Seven	Record final sales numbers on the Sales Tracking document. Transfer the sales tracking information to the Sales Tracking worksheet to calculate final sales.			✓	
Meeting Seven	Complete all financial worksheets. <ul style="list-style-type: none"> • Ensure all expenses are recorded in the Expenses worksheet. • Determine final profit by completing the Profit worksheet. 			✓	
During/After Meeting Seven	Complete the Post-Program Survey.			✓	

POST-PROGRAM

Timeframe	Task	Area	Educator	Student	Volunteer
	Liquidate company and provide Pop-Up Financials workbook to JA Area staff contact.		✓		
	Ensure funds have been delivered to the charitable organization.		✓		