



The Ultimate SMB Checklist:

How to Master Small Business Saturday and the Holiday Season

Q1 - Discover

January - March

Analyze sales data, site analytics, and audit customer feedback from your most recent holiday season to determine trends, forecast future sales, and know how to best prep your business for the new year.

If you don't already have systems in place to track analytics, now is the time to set them up!

Determine if any major updates need to be made to your site. Is it responsive (mobile-friendly), do you need a design overhaul?

Determine what areas of opportunity your business has and make a plan to go after them. *Do you need a better presence on social? Should you expand your brand to multiple marketplaces? Can you identify any patterns in customer feedback?*

Step into the shoes of your customers! Map out your checkout and returns process – even test your customer support and unboxing experience. Write down any roadblocks, inefficiencies, and feelings you got throughout the process. Use these observations to develop improvements to your process.

Q2 - Test & Implement

March - June

Start implementing any new channels, integrations, shipping software, or third-party tools into your shipping workflow.

Create and test any new shipping rules.

Run security testing to check for vulnerabilities so that you have time to fix them or hire someone to fix them.

Consider testing a single-page checkout experience to help reduce cart abandonment.

Not sure what promotion will gain the most traction during the holidays (BOGO, free shipping, etc)? Test them out now to see which one performs better.

Find a way to highlight reviews and testimonials in the months leading up to the holidays.



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Q3 - Prepare & Secure July - September

If you're looking to outsource your fulfillment, onboard your 3PL or Dropshipping company early!

Use your forecasting data to help determine how much inventory to order for the upcoming holiday season.

Refresh your website and promotional content.

Find current keywords and phrases that will help you rank high during the holiday season and start by making some quick keyword changes – utilizing holiday-specific phrasing. Don't forget your product descriptions!

Think of innovative ways to promote your products and start creating content early – holiday-themed product photos, gift guides, social media campaigns.

Perform system updates & upgrades.

Consider increasing your site's bandwidth if site speed has been an issue in the past.

Confirm your site load times are working for you, not against you.

[According to Cloudflare](#), a web page with a 2.4 second loading time has a 1.9% conversion rate. This drops to 0.6% at 5.7 seconds or longer.

Stock up on branded packaging materials and shipping tools (scales, etc.).

Start preparing your inventory for the holidays, including organizing your warehouse.

The Post-Purchase Experience

Brand your touchpoints as much as possible. [Branded tracking](#) provides clear value to customers while improving branding recognition for you. ShippingEasy makes it easy to incorporate your logo, brand colors, and brand messaging into tracked emails and pages.



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Q4 - Holidays are here!

October

Onboard a seasonal support team if you anticipate needing help with your the influx of orders, returns, and customer inquiries.

Test your customer experience one last time – from checkout to returns.

Kick-off the holiday strategy you've been planning for all year. Holiday shopping starts now!

November

Start communicating your holiday shipping deadlines as soon as possible.

Consider pre-packing popular holiday orders to save on time.

Schedule non-promotional emails early to get customers excited about the holidays.

The week before each promotional sale (Black Friday, Cyber Monday, Boxing Day), send teaser emails to show customers what deals they can expect and links to any holiday content (gift guides, product pages, etc.).

A few days before each promotional sale, send a countdown or reminder to your subscribers to help keep your brand top of mind.

December

Keep a close eye on inventory to make sure your inventory management system is operating correctly and triggering out-of-stock notices to your site.

Ensure that the returns process is flowing smoothly for customers.

Discover a Better way to Ship

If you are new to e-commerce or need help getting packages out the door more quickly, ShippingEasy offers a free 30 days trial, no credit card required. Set up in minutes. Save hours on shipping.

[START SHIPPING NOW](#)