The ultimate Peak Trading **Checklist**

Brands that start planning early secure better stock positions, reduce waste, and protect cash flow.

Our planning expert, David Smith, has spent 30 years helping businesses plan smarter — from small eCommerce brands to global retailers.

He's seen that brands who win Black Friday, Christmas, and seasonal peaks do three things: Start early, stay in control, make every decision count.

This is David's proven framework to help you do the same.

Plan smarter. Sell more. Stress less.

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Kaleidoscope

01 Plan backwards from launch

- [ ] Identify your key sales period(s):
  - Black Friday,
  - Christmas,
  - Thanksgiving,
  - etc.
- [ ] Work backwards from your peak period: typical window = 3 months ahead.
- [ ] Adjust for supplier lead times and marketing prep.

02 Check your business health

- [ ] What's selling well? What's struggling? Spot best performers and slow movers early.
- [ ] Stock health check: Are you low on key items? Overstocked in others?
- [ ] Dig into the data: Use sell-through rates + sales velocity for the full picture.

Top tip:

- Combining these metrics reveals patterns you can act on — from reordering winners to clearing slow sellers.

03 Forecast demand with current data

- [ ] Review actual performance vs. your previous forecast.
- [ ] Create a baseline forecast (no promos).
- [ ] Create a promotional forecast for planned offers.

Top tip:

- Don't rely only on last year's data — products & markets change.
- Factor in site traffic, wishlists, search trends, and early pre-orders.
- Adjust for historic stock-outs to avoid underestimating demand.
- Record key assumptions and external events that could skew results.

04 Build offers from demand signals

- [ ] Select promo products based on demand, margin, and stock.
- [ ] Estimate uplift from discounts, bundles, or offers.
- [ ] Develop a promotions calendar aligned with stock & cash flow.

Top tip:

- Account for cannibalisation between products.
- Sync marketing — emails, waitlists — with your promo plan.

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05 Secure stock & supplier readiness

- [ ] Update your forecast to calculate needed stock & delivery timings.
- [ ] Talk to suppliers early: share your plan, check MOQs, lead times, and carrier capacity.
- [ ] Place orders in time to avoid delays.

Top tip:

- Plan replenishment waves to protect cash flow.
- Include in-transit orders in your plan.
- Factor in set/bundle demand.

06 Protect working capital

- [ ] Estimate total stock + marketing investment.
- [ ] Review cash flow to ensure coverage.

Top tip:

- If financing is needed, factor in costs/fees before committing.

07 Have a contingency plan

- [ ] Model alternative scenarios — viral surges, delays, shortages.
- [ ] Plan clearance sales, bundles, or off-season promos for excess stock.
- [ ] Prepare waitlists, pre-orders, or alternatives for shortages.

Top tip:

- Explore rapid reorders or reserved stock.

08 Review & adapt post-peak

- [ ] Compare sales vs. forecast.
- [ ] Review leftover stock & promo performance.

Top tip:

- Capture learnings immediately to improve next year's plan.