

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.

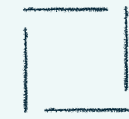
This is David's proven framework to help you do the same.

Plan smarter. Sell more. Stress less.

Keep reading ↓

01

Plan backwards from launch

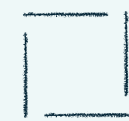


Identify your key sales period(s):

- Black Friday,
- Christmas,
- Thanksgiving,
- etc.



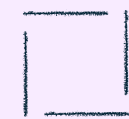
Work backwards from your peak period: typical window = 3 months ahead.



Adjust for supplier lead times and marketing prep.

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.

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?



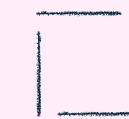
Dig into the data: Use sell-through rates + sales velocity for the full picture.

Top tip:

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

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.

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.

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.

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.

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.