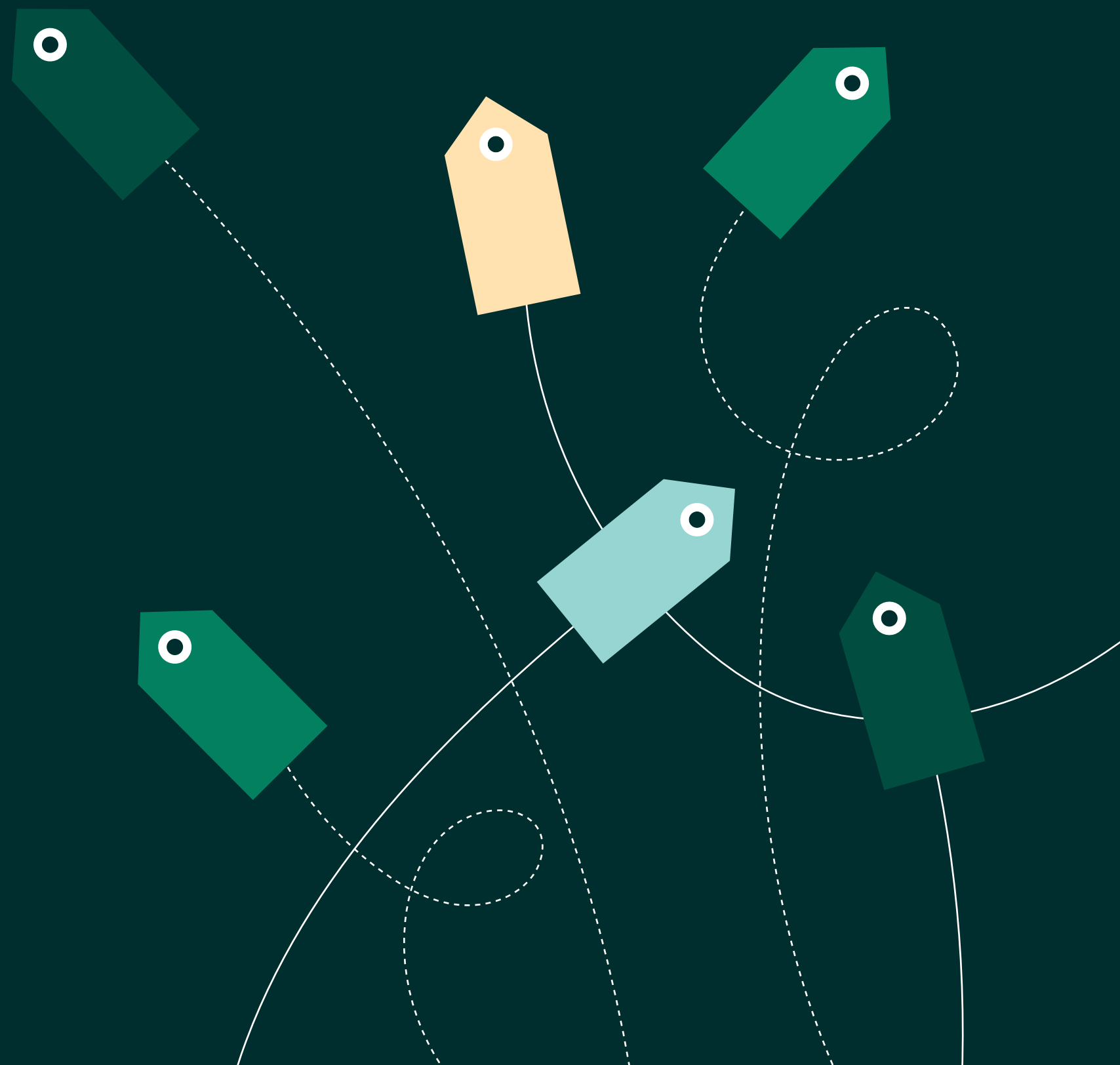**shopify**

The Peak Sales Season Checklist

It's that time of the year again.

The countdown has started. Click Frenzy (9 November), Singles Day (11 November), Black Friday (26 November), Cyber Monday (29 November) and Christmas (25 December) are ahead of us. But there's still time to optimise your 2021 peak season ecommerce sales strategy.

In 2020, Australia's online share of retail spend hit 16.3%, beating pre-pandemic predictions by four percentage points. In November alone, 5.5 million Australian households shopped online. Online purchases for that month grew by 55.6% YOY, and the week commencing with Cyber Monday was the largest in Australian ecommerce history.[*] We're expecting another record-breaking year for this season's ecommerce sales.

If last year showed us anything, it was the clear direction of omnichannel selling and the power of selling online. Use this checklist to make sure you're ready to sell and deliver a great retail experience.

*Source: Australia Post (2021). Inside Australian Online Shopping, eCommerce Industry Report.

Four days, ten times the orders

Lifestyle clothing label **LSKD** had 3,500 orders over Black Friday and Cyber Monday 2019. In 2020 they had 50,000, an increase of 1,100%. At the same time, the brand's average order value increased from $122 in 2019 to $151 in 2020 and they acquired 27,000 new customers and increased their email database by 40,000.
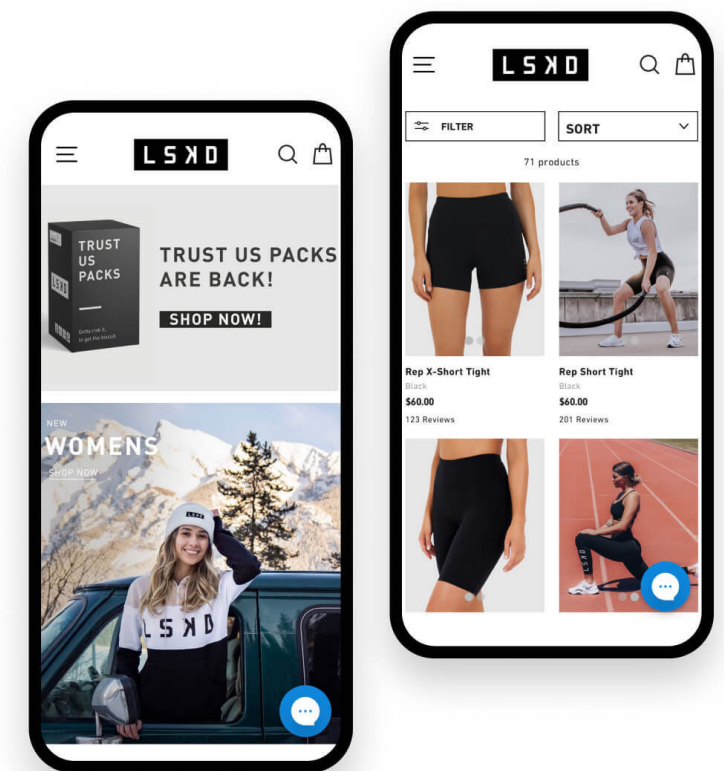
The Peak Sales Checklist

Planning

- ☑ Are you ready to handle a surge in traffic?
- ☑ Do you know the average conversion rate for your industry?
- ☑ Are you maximising your top sales channels?
- ☑ Are you sizing up the competition?
- ☑ Have you set up contingency plans?

Product

- ☑ Are you offering gift cards?
- ☑ Have you optimised your order and fulfillment workflows?
- ☑ Have you explored all of your delivery options?
- ☑ Are you offering free shipping?

Marketing

- ☑ Have you crafted your peak sales season offer/s?
- ☑ Do you have a plan for warm leads and existing customers?
- ☑ Have you implemented an abandoned cart strategy?
- ☑ Are you rewarding loyal customers?
- ☑ Are you bringing the in-store experience to life for online customers?

Customers

- ☑ Is your return policy clear and simple?
- ☑ Is your customer support team ready?
- ☑ Are your self-serve support docs up to date?
- ☑ Do you have a customer retention strategy?

Are you ready to handle a surge in traffic?

Surges in web traffic sometimes come with a stressful downside: they can cause your website to crash. But if your store is on Shopify, we've invested a lot of time to ensure our servers can handle huge spikes in sessions and sales, specifically for huge-scale events like Black Friday and Cyber Monday (BFCM). Shopify has a Flash Sale guide to help you plan for events just like this.

Tip: Based on last year's performance and expectations for this year, are you expecting more than 4,000 checkouts per minute? If so, get in touch with the Shopify team now so that they can help you prepare.

1
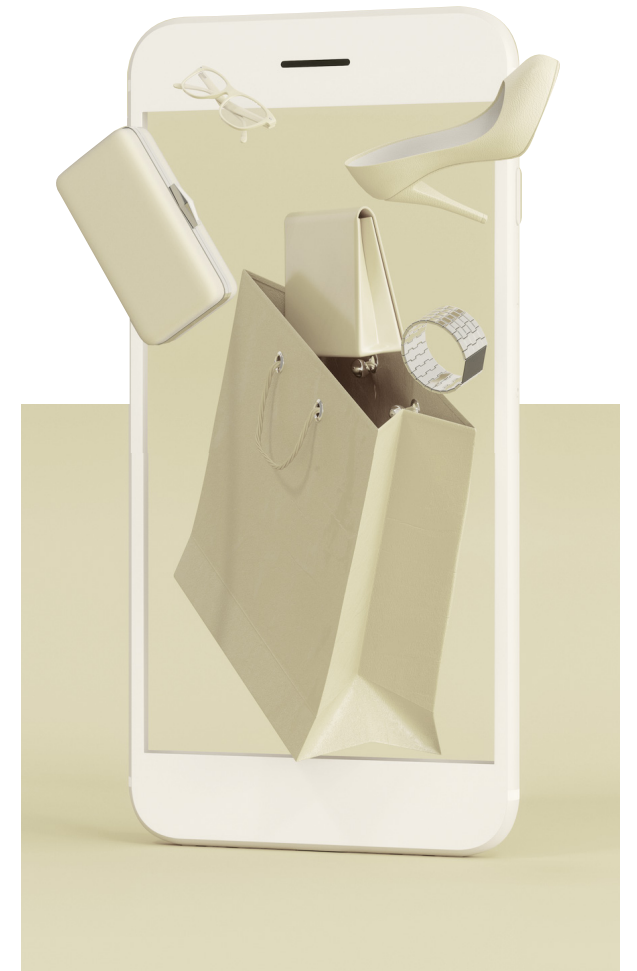
Try our Ecommerce conversion rate calculator. →

Where do you primarily sell?
Please select an option

What's your annual gross merchandise volume (GMV)?
Please select an option

What do you sell?
Please select an option

Calculate rate

2

Do you know the average conversion rate for your industry?

Know what to expect from your conversion rates. Every industry is different and knowing the average of yours can help determine the effectiveness of your sales in peak and non-peak periods. Remember: a 1% difference can mean millions more in revenue. Check the average conversion rate in your industry.

Tip: Conversion rate is a key measure of success, but should not be measured in a vacuum. Review metrics like cost per customer acquisition, AOV—average order value, and repeat customer rate alongside profitability and discount margins.

Are you maximising your top sales channels?

Every business is becoming an online business, so this is the year you'll want to reap the benefits of multichannel selling. If you're already selling on multiple channels, identify which have been most lucrative for your business and double-down during the holiday season. If you're new to multi-channel selling, then explore some of the following online sales channels:

Google | Facebook | Pinterest | Amazon

All sales channels connect with the core of your Shopify business, so you can easily keep track of orders, products, and customers across all platforms.

Tip: Some sales channels have a longer lead time for optimal performance. For example, if you're exploring the Google channel, install and set it up as early as possible. Google's algorithm takes about 15 days to learn about your online store, and to optimise performance so that your products are shown to the right shoppers.
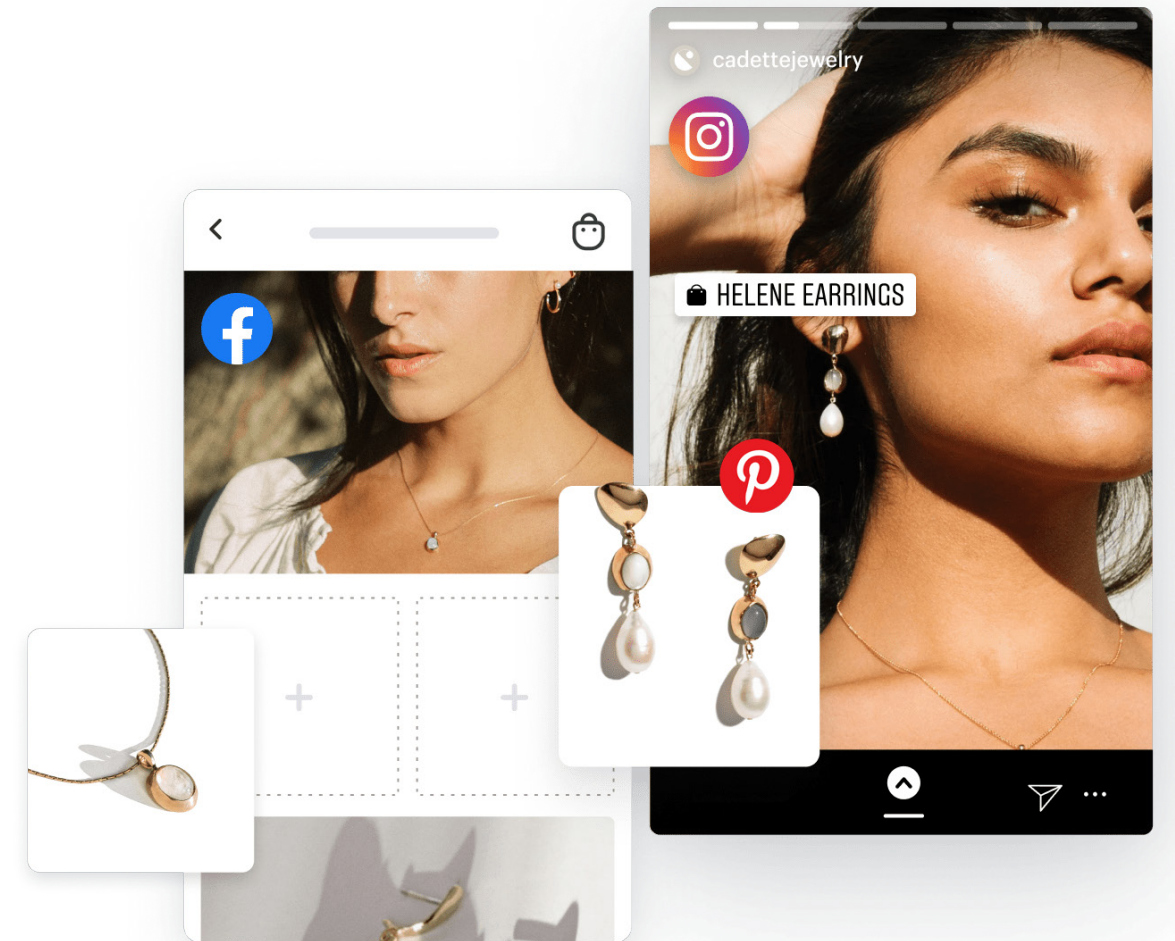
The Power of Pinterest
The Pinterest-Shopify integration app has been shown to be a more cost-effective channel compared to Facebook and Instagram. Make your images look natural and keep branding minimal to keep the inspiration from being interrupted.

3

4

Are you sizing up the competition?

Pay attention to your competition's marketing efforts to gather ideas for your own peak season deals. The easiest way to keep tabs on your competitors is to subscribe to their email list and to study the campaigns they're testing. But don't be "too inspired."

Additionally, keep tabs on competitors on social media and set up Google Alerts to see which websites are talking about them.

Have you set up contingency plans?

Being prepared means asking uncomfortable questions and preparing for the worst. Do you have the proper backups in place in case anything goes awry? What happens if the shipping company you work with becomes too busy? Or if your inventory doesn't arrive when it's supposed to? How quickly can you adjust your product plan?

It's important to prepare for tough situations. And considering the well-documented shipping delays experienced during the pandemic, along with the announcements already made by Australia Post and other shipping providers, preparing for delays is necessary.

Think about the worst-case scenarios for your business and create contingency plans wherever possible. It's much easier to handle the planning now, rather than troubleshooting in the midst of the biggest sales period of the year.

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Are you offering gift cards?

Since you need to commit to inventory in advance, check in with your suppliers early and ensure they're prepared to handle your projected sales for the peak season. One of the worst things that can happen during a sale is selling out faster than you wanted to and not meeting the demand of your customers.

A great solution? Gift cards. They capture sales that would otherwise be lost to sold-out items, while giving you time (and money) to restock before the cards are redeemed. Bonus: digital gift cards are great for driving last-minute gift purchases when shipping timelines make it hard to send a timely present.

Have you optimised your order and fulfillment workflows?

7

A high volume of sales in a short period of time can make it more difficult to fulfill and get orders to customers quickly. Here are some ways you can optimise your fulfillment workflows for peak sales season:

Organise your fulfillment area.

Whether you are using a warehouse or your basement to fulfill orders, you want to make sure your most popular products are accessible for quicker picking and packing.

Hire additional fulfillment staff.

You will likely get an influx of orders over the peak sales period, so it might be worth hiring additional staff to help fulfill and ship orders to customers more quickly.

Over-communicate.

Communicating clearly and regularly with your fulfillment and local delivery staff can help avoid errors and save you time in the long run. If you're a Shopify merchant, use Orders Timeline in your admin with specific instructions to your staff.

Over-communicate... again.

Internal communication is just as important as external communications. Ensure that your customers can be kept up to date with delays and updates so that you are managing their expectations and reducing customer-service queries about shipping.

Prioritise and organise your orders.

Plan in advance how you want to prioritise your orders and group orders by a common need, so they can be processed more quickly. Some common ways to organise and group orders, include:

Customer priority. Organise orders by customer priority and fulfill these orders first, so you can show appreciation to your most loyal customers.

Shipping requirements. Organise orders by shipping priority, so customers who paid for expedited shipping get their orders first. You can also organise by delivery method, so products fulfilled by local delivery or a given shipping provider are grouped and fulfilled all at once.

Product type. Different products require different picking and packaging requirements. Group your orders by product type, so you can optimise the time it takes to pick and pack and order.

8

Have you explored all of your delivery options?
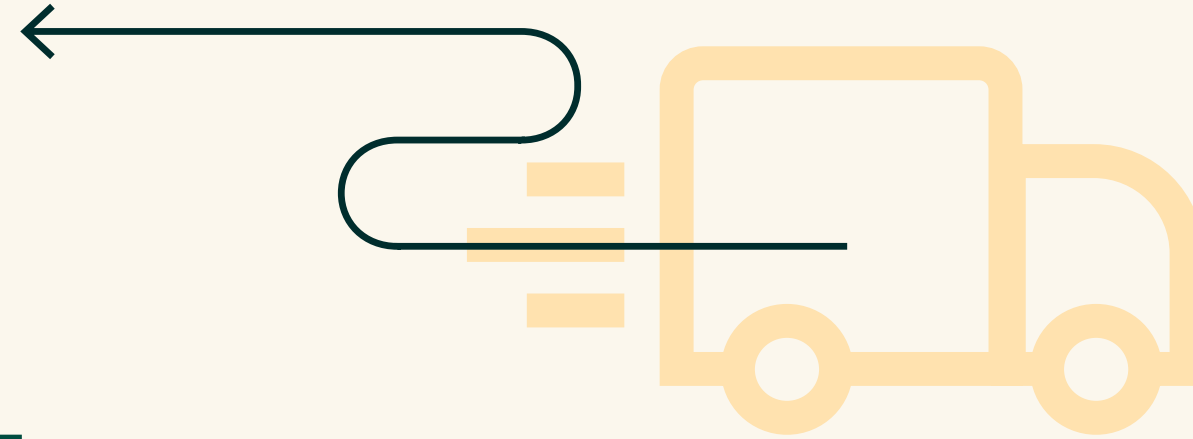
The biggest anticipated challenge for Shopify Plus brands surveyed participating in Black Friday and Cyber Monday last year was ensuring shipping carriers could deliver orders on time (45%). To combat this, ecommerce brands may consider implementing new fulfillment strategies, like buy online or pickup in store (click and collect). However, delivery times for international orders will be harder to control.

If you have opportunities for alternative fulfillment, try testing ahead of your peak sales period and monitor its success to optimise the customer experience ahead of Peak Sales Season.

Are you offering free shipping?

Not offering free shipping is the #1 reason for abandoned carts. Your brand may also want to consider incorporating charitable donations into your promotional and discount strategy given the increase in participation on Giving Tuesday this season. Some brands achieve this by giving customers an option to add a charitable donation at checkout.

Offering free shipping on orders 5-10% greater than your average order amount can boost your average order value, as can offering seasonal bundles which nudge people to add more to their cart.

9

Primary reasons for abandoned carts

Shipping costs too much — 63%

Discount code doesn't work — 46%

Order takes forever to ship — 36%

Have to re-enter credit card info — 30%

Have to re-enter shipping info — 25%

Source: Statistica 2021

10

Have you crafted your peak sales season offer/s?

One popular strategy among retailers is to heavily discount a very popular item to attract customers to a store. Once customers follow the deep discount they're likely to keep adding items to their cart on the way to the checkout. If the item turns out to be a loss leader, the difference is typically offset by the extra purchases. If you're sending an email to your subscribers, consider focusing on the one sale product you feel is the most enticing, instead of promoting all of your season's sales at the same time.

Alternatively, if loss leader pricing doesn't make sense for you, you can try out a number of other promotional ideas, such as:

- Offering a product bundle

- Gamifying your offers (e.g. spin-to-win discounts)

- Creating daily deals that are available for a limited time

- VIP previews in the days before pushing a sale live to all customers

- Extending the sale past the official end date in owned or closed channels, such as via SMS and email

- Offering recent customers special discounts with long expiries so they aren't left out of sales and discounts

- Gift with purchase promotions, just be cautious of lower AOV (average order values)

- Special treatment and sales for locations and states going through COVID-19 lockdowns

- Engaging and incentivising new customers via email marketing.

Most importantly, ensure your promotion is easy to understand, and straightforward to redeem. This will help to cut-through the other noise throughout peak sales season!

Tip: Explore powerful discounting options including Shopify Scripts if you're on Shopify Plus, as well as in-built discount codes & BOGO offers. Gamification, pop-ups and promotions using Shopify Plus Certified Apps like JustUno also provide some flexible creativity.

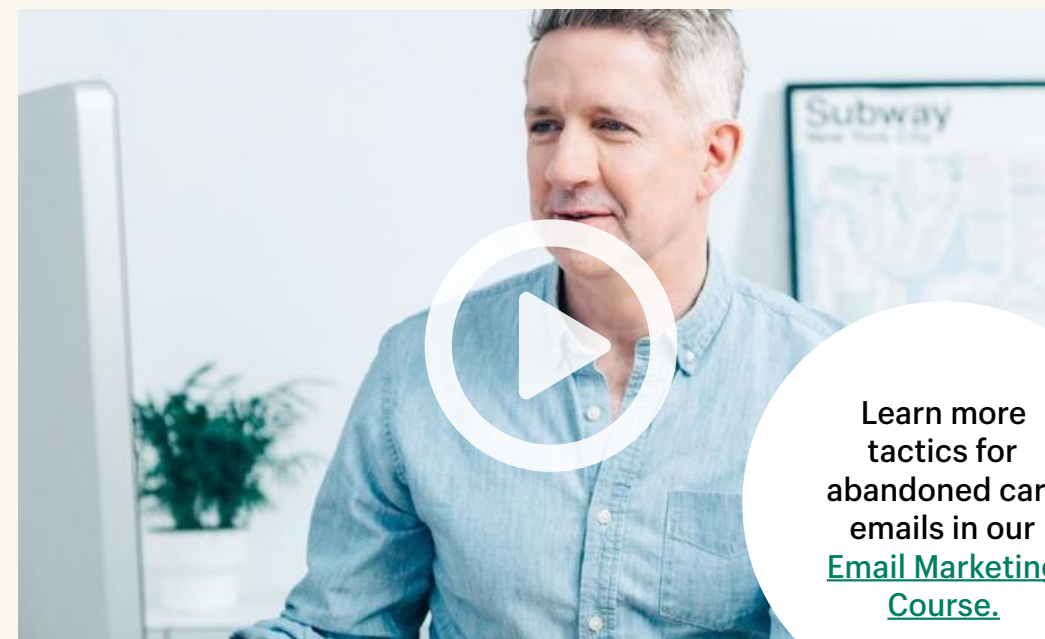# Do you have a plan for warm leads and existing customers?

11

If you've already set up the Facebook conversions API with the Facebook Pixel on your store, now's the time to use it. When you retarget previous visitors, you'll reach people who are already interested in your brand, and more likely to hit the checkout button. Reaching potential customers across multiple channels ensures your brand remains top-of-mind when it comes to sales time.

Prioritise talking to your existing customer base, to honour the 80/20 rule. With existing customers being generally easier to reach and market to than brand new customers, shoppers you've already sold to in the past should be especially receptive to your latest peak sales season offers. With recent changes to advertising guidelines, it's never been more important to invest in your owned customer data.

Have you implemented an abandoned cart strategy?

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Data from Barilliance indicates that the average cart abandonment rate on Black Friday 2020 globally was 77.79%. Of course, you'll want to try and keep that number as low as possible. Abandoned cart email strategies and other tactics are some of the most effective ways of doing this. This way, when a customer adds a product to their cart but leaves your store, you can use a compelling email to bring them back to complete their purchase.

Before peak sales season, ensure you are emailing visitors who abandon their carts. This will happen at a higher volume on peak sales season, and an automatically triggered email will help capture some of those abandoned conversions. Find out how to get this set up.

Abandoned cart optimisations include:
- Use Shopify's built-in abandoned cart recovery or use an order recovery app to recapture shoppers who added items to their cart but didn't purchase.

- Use your Email Service Provider (ESP) like Klaviyo or Privy, to build out a multi-step abandoned cart email strategy, using multiple emails with incentives and personalised content.
- Explore using SMS marketing as part of your abandoned cart, multi-channel strategy.
- Search for apps that can notify anonymous shoppers about their abandoned carts. Many merchants recommend PushOwl which sends web notifications without requiring any other contact details.

Learn more tactics for abandoned cart emails in our Email Marketing Course.

13

The peak sales season is a great time to give back. Loyalty and rewards programs are the perfect way to show appreciation to customers who love your brand. Loyalty programs, if done well, have been proven to increase repeat business and create a community for your brand.

Are you rewarding loyal customers?

Make sure that you're offering your customers perks they want by offering a combination of free gifts, exclusive discounts, members-only product releases, and points for product redemptions. You can use apps like LoyaltyLion, Smile.io, or Swell to create your loyalty program. If you already have a loyalty program in place, create a holiday-themed offer like bonus points, a holiday gift, or early access to any discounts or new products you have planned. Making your existing customers feel special will keep them loyal throughout the peak sales period and into the new year.

Are you bringing the in-store experience to life for online customers?

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Bring the in-store experience to life with live streams to showcase new collections and bring the experience into customers' homes. It's also a great opportunity to re-train sales staff if stores are closed, with live chatting and personalised shopping for a true omnichannel experience.

# Is your return policy clear and simple?

15

This season isn't just stressful for business owners; it's also a frantic time for shoppers. Go further for your customers to create a stronger relationship.

Make sure your return policy is clear, fair, and well-communicated on your store, and offer refunds where feasible. It can convince on-the-fence customers to pull the trigger, showing confidence in your product and removing potential risk.

Tip: Offer easy returns. Do you want to offer free returns to customers? Implement an automated Returns Management Solution app to help ensure that you are equipped to handle higher return volumes seamlessly. These app solutions support self serve returns, product exchanges as well as issuing a store credit.
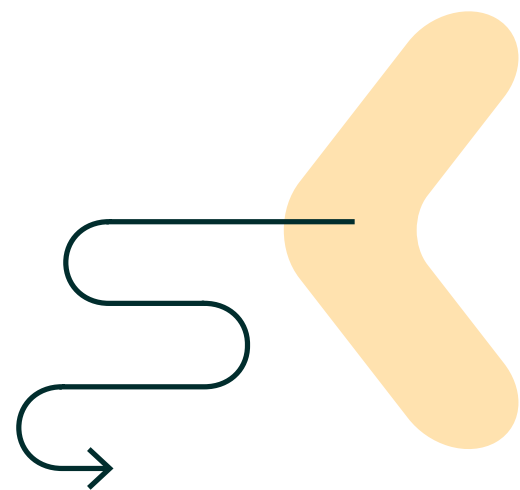
Is your customer support team ready?

16

The holidays are a hectic time for customer support. Part of providing a fantastic experience is having a quick response time—the other part is being courteous and respectful of all of your customers.

Having a few standard phrases and replies already prepared will enable you to deliver a more consistent, helpful service with minimal upfront effort. In particular, prepare for these common points of frustration:

• A customer's order is lost or delayed
• A customer is unsatisfied with their purchase
• A customer's package or product arrives damaged

It's also worth brushing up on how to handle upset customers effectively and empathetically, and what makes for genuinely delightful customer service—getting this information out of your head and written down somewhere makes it easy to share it with your team or any extra help you've hired for the peak rush.

Remember that customers aren't shopping during 9-5, so adjusting your customer service opening hours to align with key shopping times throughout the day will mean customers are better supported, and customer service teams aren't inundated each morning.

Be memorable this year and customers will remember to come back next year, when you'll be armed with more insights and a stronger strategy to tackle this peak period.

Are your self-serve support docs up to date?

Ensure that your FAQ page and any other customer-facing support documentation like your expected shipping and delivery times, customer support contact information, and chatbot responses have been updated to reflect any changes to your store policies over the peak sales season.

Having key information easily accessible to shoppers will help reduce the volume to your support team and allow them to focus on addressing other customer inquiries faster.

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Do you have a customer retention strategy?

Make sure you don't lose touch with your newly acquired customers via retention tactics. It's easy to get caught up with planning and execution of peak sales season, but it's just as important to ensure you keep your new customers engaged and coming back. Post-sale retention strategies might include personalised thank-you emails or launching a loyalty program.
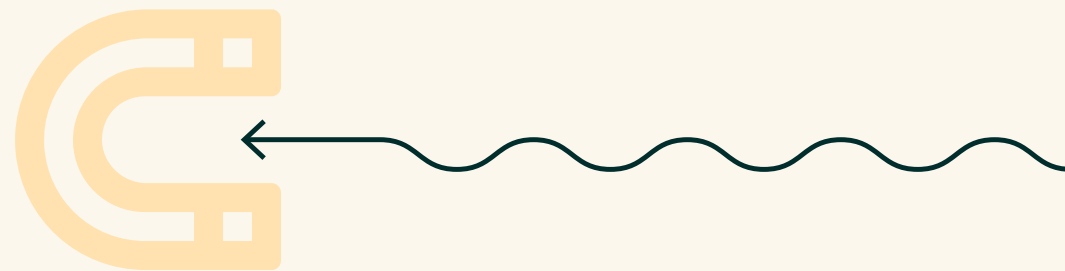
Preparation, planning, and starting early are the keys to peak sales season success. This checklist covers the fundamentals to help prepare you for the many sales ahead.