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Smart Business Brief

Advice for Success!

Plan Ahead: A Campaign for “Crunch Time”

Are November and December your busiest months? Set this checklist in motion in June. Do you rely on summer business? Start preparing in January!

Review Your Finances

Review financial reports (P&L, Income, Expense, etc.) for a snapshot of your company’s financial health.

Evaluate Sales and Be Aware of Trends in the Marketplace

Examine sales reports to identify profitable and unprofitable products and services and unexpected or recent trends in areas where you may be able to increase profits.

Keep in touch with marketplace trends and forecasts.

Involve front line and office staff in identifying products and services for the season.

Purchasing Products?

Identify products, price points, and promotional items as you go into the season.

Review product lines and pricing from several sources.

Write purchase orders for loss leaders and other must-haves.

Purchase in bulk if possible and negotiate to stretch payment terms through the season.

Evaluate your sources’ abilities to deliver product on demand during the season.

Servicing Clients?

Focus on services most valued by clients during your busy time and prepare to deliver.

List any promotional services you plan to offer.

Create a variety of service price points to meet client budgets and needs.

Consider flexible payment terms, or discounts for advance payments, for retail/seasonal businesses.

Marketing Plan

Determine the best marketing mix for your products and services: tv, radio, newspaper, flyers, social media, etc.

Begin to prepare brochures, newspaper or radio advertising, e-mail and/or social media campaigns, etc. for promotional and standard products and services.

Sales and Support Plan

Generate product and service information for sales staff.

Train sales staff on the features and benefits of new product and service offerings.

Create point-of-sale information for staff.

Research, list, and prepare to target customers and clients for specific products or services.

Set sales goals and contingency plans for the upcoming months.

Need extra help? Begin to hire and train full or part-time help as the season gets closer.

Plan to gradually increase any materials necessary for sales support such as printed material, receipts and invoices, bags, boxes, parts, etc.

