

# Small Business Seasonal Checklist WINTER/SPRING



## Review 2025 Performance

- Analyze year-over-year trends comparing 2025 sales to 2024
- Evaluate which products or services delivered the highest profit
- Assess marketing ROI, match sales spikes to promotions
- Identify your best customers and evaluate loyalty programs
- Identify product lines and services to expand in 2026
- Review inventory turnover & stockouts
- Analyze seasonal, events, and promotion impact on sales
- Review new customer and new customer growth



## Set 2026 Goals

- Set SMART Goals (Specific, Measurable, Achievable, Relevant, Time-Bound)
- Examples
  - Sell more online - through [Shop Iowa LINK](#)
  - Reduce inventory hoarding - [Webinar LINK](#)
  - Sell more through education and experience events



## Create 2026 Calendar

- Include:
  - Holidays, seasonal promotions, local events
  - Loyal customer events & promotions
  - Inventory audits
  - Tax deadlines (Annual & Quarterly Sales Tax)
  - Payroll reports
  - Seasonal sales
  - Marketing campaigns, product launches
  - Window display changes (4-6 weeks)
  - Buying markets



## Prepare for Seasonal Slow Down

- Create an annual marketing plan & update websites
- Close for staff training, construction or major reorganization
- Host workshops or community events
- Review end of year financials, 2026 budget, and vendor contracts
- Conduct inventory audit & technology updates



# Small Business Seasonal Checklist SUMMER/FALL



## Preparing for Q4

- Ramp up loyalty programs
  - Collect emails, addresses, and birthdays
  - Increase subscriptions to newsletters and social media
  - Create special deals and exclusive events for loyal customers
- Explore new revenue streams: online sales, subscription boxes, customization, wholesale, gift baskets, corporate accounts, tailoring, limited editions, pop-up collaborations, unboxing selling



## Marketing & Promotions

- Prepare back-to-school campaigns
- Promote to your customers local holiday events, Pink Friday, and Small Business Saturday
- Emphasize the importance of shopping local
- Set loyalty program goals 'increase sign-ups by 20% in September'
- Promote a gift card program
- Market workshops and experiential events as unique gift options



## Inventory & Merchandising

- Clear out slow moving merchandise
- Keep displays and endcaps fresh with new seasonal products
- Reorganize your store layout to accommodate for events and extra holiday inventory



## Operations & Staffing

- Adjust staffing schedules for peak shopping days
- Train temporary employees
- Review emergency procedures: scams, weather, etc. [LINK](#)
- Prepare for inclement weather: shovel, salt, delivery options

