



Black Friday Readiness Checklist

Everything you need to do, by when,
to run a successful Black Friday promo





The Clock Is Ticking... Are You On Track For Black Friday?

This guide is a no-fluff, just-tell-me-what-I-gotta-do checklist to make sure you are 100% ready for Black Friday.

We've broken down all the critical Black Friday to-do's from the months before Black Friday to the post-event wrap-up.

At SegMetrics, we're here to help you optimize your Black Friday results.

Keith Perhac

Founder and CEO, SegMetrics

✓ PS! Even more stuff!

Here are some additional resources which may help you make the most of your Black Friday promo:

- ✓ **Free Ad Attribution Audit** – Find out what is and isn't driving ROAS with your ad strategy
- ✓ **Ultimate Tagging Guide** – Learn how to track leads through your marketing funnel
- ✓ **How to improve your conversion rate** – The 80/20 tactical improvements to drive more results from any step in your marketing
- ✓ **Talk to a marketing analytics expert** – We're here to help!
- ✓ **Free custom Black Friday dashboard** – Let us build you a dashboard personalized to your business and Black Friday strategy

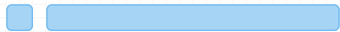


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1-2 Months Before Black Friday

Starting early is one of your best levers for Black Friday success. It's much easier – and less stressful – to fix problems ahead of time than during the Black Friday rush. Here are the critical preparations you should complete early.

TECHNOLOGY



Test Website Performance

Run website stress tests and optimize for high traffic, including page load times. Are you ready for a flood of traffic?



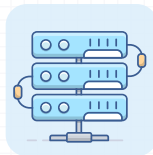
Ensure Mobile Readiness

Because many shoppers use mobile devices, your website should be fully optimized for mobile browsing and checkout.



Set-up Payment Options

Make it easier for customers to pay by offering multiple payment methods including credit cards, PayPal, and digital wallets. (ApplePay support is a must!)



DATA



Set-up Full-Funnel Analytics

Track your full customer journey, from ad clicks to purchase, to ensure there are no weak spots in your sales funnel. This should be set up and tested before Black Friday.



Audit Your Marketing

Review and refine your marketing strategy to identify the most effective channels, campaigns, personas, ads and products. Focus your Black Friday promotion on your proven winners.



Ensure Mobile Readiness

Leverage historical performance data to inform your expectations and spending for this year's Black Friday promotion. Make sure your pricing and discounting is competitive but still profitable by reviewing revenue, profit, ROAS and LTV.



STRATEGY

✓ Start Planning Early

Begin preparations weeks or months ahead to avoid last-minute rushes and allow for adjustments and delays.

✓ Create a Promotion Calendar

Plan out your Black Friday promotions in advance to ensure consistent and timely messaging across platforms during Black Friday.



OPERATIONS

✓ Align Inventory & Fulfillment

Ensure your inventory levels and fulfillment processes are ready for a surge in orders.

✓ Prep Scalable Support

Get customer support ready for a spike in inquiries and issues. Leverage systems, training, technology (e.g. chatbots), and temp staffing to scale your support needs quickly.

✓ Plan Ahead for Returns

Set up processes to handle post-event returns efficiently and ensure customer satisfaction. Make sure your refund and return policies are clear and up-to-date.



SALES & MARKETING

✓ Start Building Content

Design landing pages, draft product and sales copy, write email sequences, build ads, and create social media content ahead of time. Automate as much of the content as you can and create a clear calendar for any marketing that must be sent manually.

- | | | |
|---------------------------------|--------------------------|----------------------|
| • Landing pages | • Blog posts | • Site pop-ups |
| • Checkout pages | • Site banners | • Exit pop-up offers |
| • Confirmation emails | • Podcast episodes | • Coupon codes |
| • Cart abandonment campaigns | • Internal promotion FAQ | • Emails |
| • Post-purchase email campaigns | • Social media content | • Custom graphics |
| • Product recommendations | • Paid ads | • Videos |
| • Point-of-purchase upsells | • Remarketing ads | • And more! |

2 Weeks Before Black Friday

If your Black Friday planning has gone well, you should be in good shape by mid-November. All that's left is final checks. Giving yourself some buffer for unavoidable delays will help ensure that everything is completed on time.

2 WEEK CHECKLIST



Finalize Your Content

Polish and pre-load as much of your Black Friday marketing and sales content as possible. Proof everything.



Execute Your Data Tracking Plan

Finalize your strategy for accurately and clearly tracking all user engagement, actions and purchases. Double-check that your tracking is working.



Address Open Risks

Take time to review your preparations and run through “what if...?” scenarios. Are you ready? Make your list, check it twice.



GAME TIME!

During Black Friday/Cyber Monday

Black Friday is the day after Thanksgiving, but Black Friday promotions are starting earlier and running longer every year. Your primary responsibility during the event is to monitor your business and address any surprise issues that pop up.

GAMETIME CHECKLIST



Track KPIs in Real-Time

Monitor critical metrics like sales, traffic, and customer behavior in real-time to adjust your strategies as needed.



Run A/B Tests

Test variants of your landing pages, email subject lines, and CTAs to see what resonates best with customers.



Monitor Your Competitors

Keep an eye on competitor promotions and adjust your pricing or offers to ensure you stay competitive during Black Friday.



Monitor Site Performance

Make sure tech problems don't interrupt your Black Friday traffic or sales.



Double-Check Promotion Execution

Make sure all of your promotional materials are sent at the right time.



Monitor Support & Fulfillment

Ensure your business is scaling smoothly to meet your Black Friday demands and address any hiccups that pop up.



After Black Friday

Whew! Black Friday's over, but don't move on just yet. Doing some post-event reviews and organization will set you up for success with future promotions – including next year's Black Friday!



RETROSPECTIVE



Review Your Feedback

Send and review any surveys to gather customer feedback. Also review email replies and customer support requests. Combine this qualitative data with your quantitative data.



Conduct a Retrospective

Review your Black Friday data to identify what did and didn't work. Document your insights to inform planning for future promotions—including next year's Black Friday.



Evergreen All Assets

Make sure any materials you used are correctly titled, organized and easy to find for future review. (This is a small administrative step that can make your life much easier in the future.)



About SegMetrics



SegMetrics is a full funnel analytics platform designed to give you unparalleled accuracy, cross-platform tracking, and deep performance insights – with the need for a dedicated data analytics team.



Full Customer Journey Tracking

SegMetrics goes beyond basic analytics by allowing you to trace every interaction a customer has with your brand, from the first ad click to the final purchase. Whether you're using tools like Facebook Ads, Stripe, or other CRMs, SegMetrics ties all these data points together to show you exactly where your leads are coming from and how they convert into sales over time.



Accurate Attribution

Unlike other analytics platforms that rely on short attribution windows, SegMetrics offers unlimited attribution windows. This means you can track a lead's journey over months or even years, ensuring you capture the true lifetime value (LTV) of your customers. By connecting historical and incoming data, SegMetrics allows you to optimize your marketing campaigns based on the real revenue they generate, not just initial clicks.



Advanced Segmentation & Reporting

SegMetrics enables you to filter contacts by any attribute or action tracked in your CRM. Discover which customer personas, campaigns, and assets are most valuable and how different segments respond to your marketing efforts. Moreover, with customizable dashboards and pre-built reports, you can easily visualize and share insights with your team, ensuring everyone is on the same page.



Seamless Integration with Your Tools

With 100+ integrations, SegMetrics fits seamlessly into your existing marketing stack. Whether you're using email marketing platforms, ad networks, payment processors, or CRMs, SegMetrics pulls data from all these sources to provide a single source of truth for your marketing performance.

Don't Leave Your Marketing Success To Chance

Unlock the true potential of your marketing data, optimize your campaigns, and maximize your ROI. Experience the power of SegMetrics with our [14-day free trial](#) – using your own data.

[Start your 14-day free trial today →](#)