

CallRail

Checklist:

How to prepare for Small Business Saturday



More shoppers choose Small Business Saturday over Black Friday for holiday deals.

A record-breaking number of shoppers — 200.4 million — hit the stores Thanksgiving weekend in 2023 to spend \$17 billion.

Small businesses can make the most of this year's event by devising their marketing and sales strategies in advance. Use this checklist to prepare and make sure you're ready for the big day.





1 month ahead

Create promotions

Decide which discounts, partnerships, and special offers you want to promote to attract customers to your store.

Set up your map listing

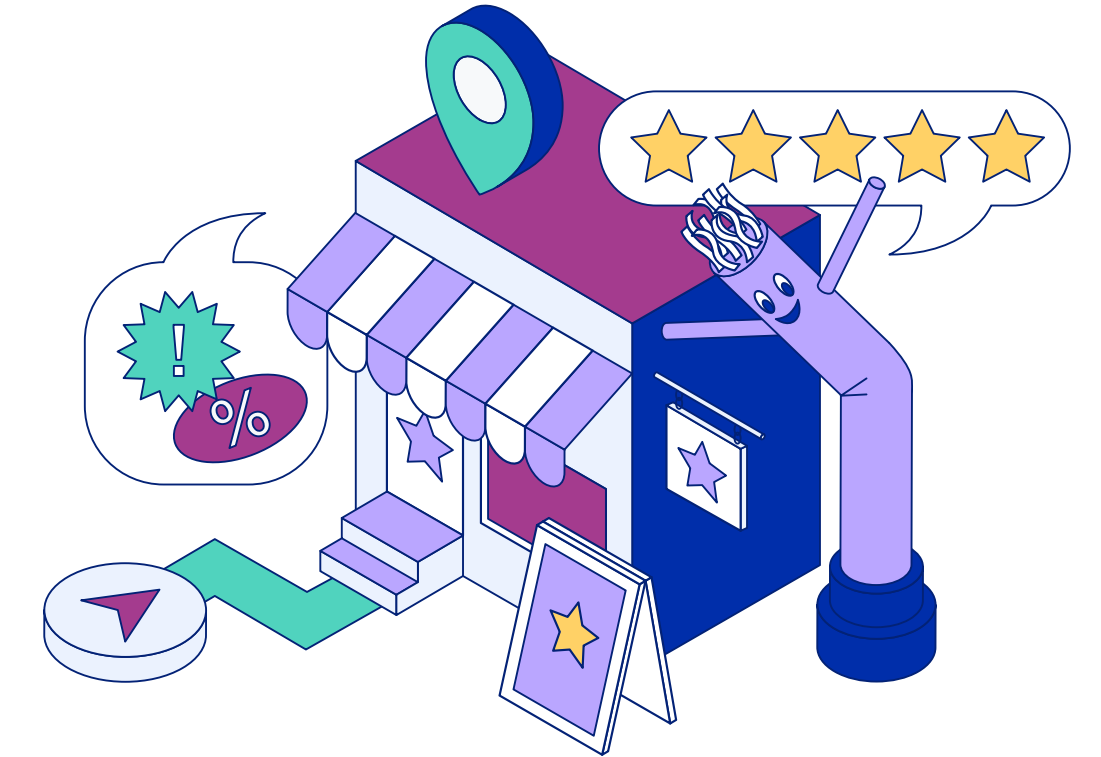
Add your business to the American Express Shop Small Map listing to help customers find you on Small Business Saturday.

Establish payment options

Set up and test online and in-person methods to ensure transactions run smoothly on the big day.

Update your online presence

Check that your website and social media profiles contain current information, and can handle traffic and address customer questions.



Check your inventory

Make sure you have enough promotional items, gift cards, and best-selling products in stock, then order what's still needed.

Set up automated responses for missed calls

Ensure you don't miss calls during the busy holiday season with CallRail's automated response feature. Use this feature to send an automated text to let a customer know when they can expect to hear from you if you missed their call.

10%



Customers report a 10% increase in leads by reducing missed calls.

2-3 weeks before

- **Design promotional materials**
Create or download marketing materials like graphics, posters, and social media posts.
- **Publicize your participation**
Start letting customers know you're involved with Small Business Saturday by sharing the news on signage, social media, your website, and email newsletters.
- **Prepare your website**
Set up your online sales and update information about cross promotions and event-day activities.



"CallRail helps us glance through the call logs and identify the reason customers are calling us and the general sentiment on the calls."

Verified User, Marketing & Advertising

- **Get involved with your community**
Engage with community groups, local influencers, other businesses, charitable causes, or Small Business Saturday walking tours to make connections and support other local organizations.
- **Track leads**
Use lead tracking and AI tools to learn how customers found you for Small Business Saturday, then use the insights all year.



1 week before

- ☐ **Train your team**
Review customer service best practices and use tools like CallRail's call coaching, which analyzes calls in real-time and delivers timely, personalized feedback to improve conversations for a better customer experience.

What do you like best about CallRail?

“Being able [to] listen to calls to find any errors or miscommunications and train employees better on how to speak to the clients!”

Juan C., Paralegal Office Manager



- ☐ **Post on social media**
Share your Small Business Saturday deals as well as details about your store location and hours.
- ☐ **Remind customers**
Send out event reminders via mail and email to let local shoppers know what you have planned.



- ☐ **Prepare your store**
Clean and organize your shop to ensure it's welcoming for customers on the day of the event.

After the event

□ Analyze your data

With Call Tracking and AI-generated call summaries and sentiment analysis, you can easily review how the day went and what you can do differently next year by examining call and marketing data and then plan changes.



“CallRail has been a game changer when it comes to tracking calls and viewing the analytics for these calls.”

– Brittany R., Executive Administrative Assistant

□ Request customer feedback

Ask customers for their opinions of the event so you can better plan next year, and request reviews and referrals from happy customers.

□ Follow up

Share post-event emails, bounce-back promos, and social media posts to thank your customers for their business.



Streamline customer interactions in time for your holiday sales

By following the steps in this checklist, you'll be ready to participate in Small Business Saturday and optimize your sales for this popular event. [Start your free 14-day trial](#) of CallRail's AI-powered Call Tracking to understand the full impact of your Small Business Saturday campaigns.

Try 14 days of CallRail right now for free

No credit card required.



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