

PROFITEDGE CALENDAR · EXECUTIVE

Preseason Planning Calendar

The busy months are decided in the slow ones. Start with an honest look at last season while it's fresh, then plan buying, staffing, service and cash together, with dates and a name next to each.

Season

Season starts

Plan owner

Date

1 Look back at last season

A few lines under each heading are enough. Without them, next year's plan is built on memory.

QUESTION	WHAT HAPPENED
What sold out early, and what was left over?	
Which units and parts were still on the floor at the end of the season?	
How far ahead was service booked at the peak, and how many customers went elsewhere?	
Where were the staff stretched, and where were they waiting?	
Which vendor programs paid off, and which ones filled the shelves?	
What did the cash position look like at the low point?	

2 What we'll change

3 The four plans, month by month

Write the month across the top. Each plan depends on the others, so check the questions on the right as you go.

PLAN	MONTH	MONTH	MONTH	MONTH	OWNER
Buying what, when, terms					
Staffing hire, train					
Service preseason work, parts					
Cash out, back in, low point					

QUESTIONS THAT LINK THEM

- ☐ Can the shop set up and deliver what we're buying?
- ☐ Will new staff be trained before the rush, or during it?
- ☐ Are the parts for preseason service work on the shelf in time?
- ☐ Can the business carry the inventory until it sells?

4 Steps and dates

STEP	OWNER	BY	DONE
Review last season and write down what we learned			☐
Set the buying plan and decide which programs to join			☐
Plan staffing: who, when to hire, when to train			☐
Plan preseason service work and the parts it needs			☐
Map cash in and out across the season, and know the low point			☐
Check progress each month until the season starts			☐

The rush isn't the time to find out the shop can't keep up.

WANT A SECOND SET OF EYES?

Start a conversation at profitedgesystems.com about planning your next season.