

The Q4 Planning *Toolkit*

*A fill-in workbook for owners who sell things or sell time.
Plan the quarter backward from the 2026 dates and forward
from whatever you already know, then commit it to one page
you can pin up.*

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ISSUE

030 · The Operating Floor

SITE

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READ THIS FIRST · 5 MINUTES

Six steps, one map.

Black Friday, Cyber Monday, and the shipping cutoffs arrive whether you have a plan or not. Work the pages in order, and if this is your first Q4, treat every blank as the baseline you will plan from next September. The example rows come from TerrellDominick.com, the ecommerce brand my wife runs and where I work full-time, four Q4s in. The offer never changed. The plan widened from Black Friday to the whole quarter.

- 1

Circle the dates.
Every anchor already sits on your customer's calendar. Check the ones you will run, open earlier in November than the crowd, and use October to test. Pages 3 and 4.
- 2

Gather what you have.
Last year's numbers by promo day if you ran promos. Your list, your reachable customers, your best sellers, and your capacity if you did not. Page 5.
- 3

Find the opportunity.
A promo day that came in under the year before is where the work goes. Write the soft spots down before you write anything else. Page 6.
- 4

Write the hypothesis.
One sentence, one lever, one number to watch. Page 6.
- 5

One offer, many wrappers.
Decide the offer once. Dress it differently for each anchor. Page 7.
- 6

Build, test, run.
Every asset built and tested in the week before its date. Pages 8 and 9.

If you sell time instead of things, page 10 swaps the wrappers. Page 11 is the one page you pin up.

The planning timeline

WHEN	WHAT IS LOCKED
Late September	Intel gathered, opportunities marked, hypotheses written, the one offer decided.
Early October	Test window open. Offers, audiences, and segments tried on a small scale before they count.
Two weeks before your first date	Every asset built. Emails loaded, pages live in draft, ads in review.
The week before	Test with real orders and real inboxes. Fix what breaks.

CIRCLE THIS · OCTOBER AND NOVEMBER 2026

The anchor dates, part one.

Every date below is already on your customer's calendar. Check the ones you will run, give each a job, and name the wrapper on page 7. The shaded rows are the windows most owners skip.

RUN	DATE	ANCHOR	ITS JOB IN YOUR QUARTER
OCTOBER · THE TEST WINDOW			
☐	Oct 6 to 7	Prime Big Deal Days	Shoppers are already in a buying mood. Run a small offer, test audiences and segments, learn before it counts.
☐	Oct 31	Halloween	A themed wrapper on the same offer. Good for a giveaway that builds the list.
NOVEMBER · GO FIRST			
☐	Nov 2 to 13	Early November window	Open before the crowd. Early access to the list, giveaways to grow it, first paid retargeting.
☐	Nov 11	Veterans Day	Honor it if it fits your customers. Skip the discount angle.
☐	Nov 25 to 26	Early access, 48 hours	The list shops first. Day one opens Wednesday, day two is Thanksgiving, and each day gets its own number to watch. Thanksgiving sends go out in the morning, then quiet.
☐	Nov 27	Black Friday	The biggest single day. Everything tested, every channel on.
☐	Nov 28	Small Business Saturday	Your story wins here. Founder note, local angle, the people behind the product.
☐	Nov 30	Cyber Monday	Last call on the Black Friday wrapper, or a new wrapper on the same offer.

The go-first rule. The date that separated our years was the one we opened before everyone else did. Pick your open date now and write it here: _____

CIRCLE THIS · DECEMBER 2026 AND THE JANUARY BRIDGE

The anchor dates, part two.

December is where the quarter either keeps running or quietly stops. Fill in your own shipping cutoffs, they are the only dates on this page you control.

RUN	DATE	ANCHOR	ITS JOB IN YOUR QUARTER
DECEMBER · KEEP IT RUNNING			
☐	Dec 1	Giving Tuesday	A give-back wrapper. Pick a cause your customers care about and say what a purchase funds.
☐	Dec 4	Hanukkah begins	Gift-guide timing for the first half of the month.
☐	Dec 14	Green Monday	eBay's name for the second Monday in December, one of the last big online days before the cutoffs. A last-shipping-week wrapper.
☐	_____	Standard shipping cutoff	Your date. The strongest urgency line you will write all quarter.
☐	_____	Expedited cutoff	Your date. Last call for gifts that have to arrive.
☐	Dec 19	Super Saturday	Last Saturday before Christmas. Gift cards and local pickup carry this one.
☐	Dec 25	Christmas	Send nothing, or one thank-you with no ask.
☐	Dec 26 to 31	The in-between week	Gift card redemptions, exchanges, and a year-end wrapper on whatever is left.
JANUARY · THE BRIDGE			
☐	Jan 1 to 15	New year window	The list you built in Q4 is the business you run in January. Plan the first send now.

Three is enough. Most owners run three windows well or six windows badly. Pick yours on page 11 once the rest of the pages are filled in.

FILL THIS · WHAT YOU HAVE

Gather what you have.

Two tables. The first is what you are walking into the quarter with, and every business can fill it. The second is last year by promo day, if you ran any. If you did not, leave it blank now and fill it in December, because that is the baseline you will plan from next September.

WHAT I HAVE GOING IN	THE NUMBER
People on my email or text list	
Past customers I can reach by phone or email	
My best sellers, or my most-booked services	
Capacity in the window (units, slots, or jobs)	
Last year's Q4 revenue, by month if I have it	

Last year, by promo day

DATE OR WINDOW	REVENUE	ORDERS OR BOOKINGS	AVERAGE TICKET	PEOPLE REACHED	RESPONSES

People reached is emails and texts sent, or calls made. Responses is opens and clicks, or replies and bookings. Use whichever your business produces. If you sell online, add sessions, conversion rate, and revenue per session. Revenue per session is revenue divided by sessions, and it is the single number that tells you whether the traffic you bought was worth buying.

FILL THIS · THREE HYPOTHESES

Find the opportunity. Write the hypothesis.

Look at page 5 and circle every cell that came in under the year before. Those are the opportunities. Each one gets a single sentence with one lever and one number to watch. Three is enough for a quarter.

THE SHAPE OF A HYPOTHESIS

[Promo day] came in under last year on **[metric]**, so this year we **[one lever]**, and we watch **[the number]** against **[the target]**.

EXAMPLE · FROM OUR OWN MAP

Day two of early access came in under last year on revenue, so this year we add a day-two morning send and tighten retargeting to the early access segment, and we watch day two revenue against a target of beating the prior year.

WHAT CAME IN LOW	THE ONE LEVER	THE NUMBER WE WATCH	TARGET

First Q4. You have no soft spots yet, so the hypothesis is a guess. Write it anyway, pick the number, and the number you record becomes the baseline. Next September this page fills itself.

DECIDE THIS · ONCE

One offer, many wrappers.

Our discount stayed the same for the whole season, every year. What changed by date was the name, the hook, and who heard about it first. Decide the offer here and spend the rest of your energy on how it is dressed.

THE ONE OFFER FOR THE QUARTER (THE DISCOUNT, THE BUNDLE, THE GIFT WITH PURCHASE)

ANCHOR DATE	WRAPPER NAME	THE HOOK LINE	FIRST TO HEAR	CHANNEL
Early access				
Black Friday				
Cyber Monday				
Shipping cutoff				

The giveaway that grows the list

A giveaway gets people onto the list in October, before the first paid ask, so the early access email in November has someone to go to. One per window is plenty.

WINDOW	WHAT WE GIVE	WHAT WE ASK FOR	RUNS
October			
Early November			

BUILD THIS · TWO WEEKS BEFORE YOUR FIRST DATE

The asset checklist.

Everything below exists before the first anchor date, with a name next to it. Check the box when it is built, then again when it is tested with a real order and a real inbox.

BUILT	TESTED	ASSET	OWNER	DUE
☐	☐	Imagery and product shots for each wrapper		
☐	☐	Homepage banner and collection page updates		
☐	☐	Landing page or early access page		
☐	☐	Discount codes and automatic discounts, tested at checkout		
☐	☐	Email builds, one per send on page 9		
☐	☐	Text messages, loaded and scheduled		
☐	☐	Segments: early access list, past buyers, quiet customers		
☐	☐	Ad audiences: past buyers, site visitors, lookalikes		
☐	☐	Ad creative, one set per wrapper		
☐	☐	Giveaway mechanics and entry form		
☐	☐	Social content calendar, drafted and scheduled		
☐	☐	Inventory or capacity confirmed for the offer		
☐	☐	Shipping cutoff dates posted on the site		
☐	☐	_____		

SCHEDULE THIS · PER ANCHOR DATE

The messaging playbook.

Each window gets this shape once. Black Friday week, from early access through Cyber Monday, is one window, the shipping cutoff is another, and the January bridge is a third. The wrapper changes, the shape does not, so build it once and copy it.

SEND	WHEN	WHAT IT SAYS	SUBJECT LINE
Tease	7 days out	Something is coming. No details, no discount. Get on the early list.	
Early access	2 days out	The list shops first. Link goes live, code in the email.	
Day two	1 day out, morning	Still early, still yours. Best sellers moving, then quiet for the day.	
Open	Day of, morning	It is live for everyone. The hook line from page 7.	
Reminder	Day of, evening	Best sellers moving. Social proof, what is left.	
Last call	Closing day of the window	Hours left. Nothing new, just the deadline.	

Text

- ☐ **Three per anchor, at most.** Early access open, day-of open, last call.
- ☐ **Under 160 characters.** Name, the wrapper, the link.
- ☐ **Never before 9am local.**

Social

- ☐ **Countdown** post the week before.
- ☐ **Product and proof** on the day, two posts and stories.
- ☐ **Last call** in stories on closing day.

Paid

- ☐ **October:** prospecting to cold audiences, small budget, learn what converts.
- ☐ **Early November:** retargeting on, site visitors and past buyers.
- ☐ **Black Friday week:** budget up on what October proved.
- ☐ **December:** gift guide and shipping cutoff creative, then off after the cutoff.

WHO OWNS THE SENDS

SWAP THIS · IF YOU SELL TIME INSTEAD OF THINGS

The service-business version.

The process is identical, and the intel, the hypothesis, and the calendar stay the same. What changes is the wrapper, because your customer is buying a future appointment instead of a box. Use the right column and run the rest of this toolkit as written.

ANCHOR	THE RETAIL WRAPPER	THE SERVICE WRAPPER
Early access	The list shops 48 hours early.	Current clients book January first, before the calendar opens to anyone else.
Black Friday	The season's offer, every channel on.	Pay-in-full or a prepaid block of sessions at the season's rate. Cash now, calendar full later.
Small Business Saturday	Founder story, local angle.	Same story, with your face and your team in it, and gift cards in the post.
Cyber Monday	Last call on the wrapper.	Gift-able packages with a printable card, bought online for someone else.
Shipping cutoff	Last day for delivery by Christmas.	Last day to book before the holiday break, and the year-end deadline for clients with budgets to spend.
January bridge	First send to the new list.	New-year intake. Every gift card and prepaid block from December gets a booking link in the first week.

THE SERVICE WRAPPER I WILL USE FOR EACH OF MY THREE DATES ON PAGE 11

COMMIT · THIS WEEK

The whole quarter on one page.

Three dates, a hypothesis for each, and one build deadline. Fill it in from the pages behind it, pin it where you can see it, and check the boxes as they land.

DONE	DATE I WILL RUN	WRAPPER NAME	THE HYPOTHESIS AND THE NUMBER I WATCH
☐			
☐			
☐			

BUILD DEADLINE (TWO WEEKS BEFORE THE FIRST DATE ABOVE)

TEST DAY (THE WEEK BEFORE)

THE FIRST JANUARY SEND, AND WHO IT GOES TO

ONE MORE SET OF EYES

If you want someone to look at your map before the first date lands, book 20 minutes at **book.fromthefloorup.co** and bring this page filled in. We will find the soft spot together. And if you are not on the Tuesday letter yet, it lives at **fromthefloorup.co**.