

5 Steps to *Winning* Q4



The BFCM Playbook

Swap



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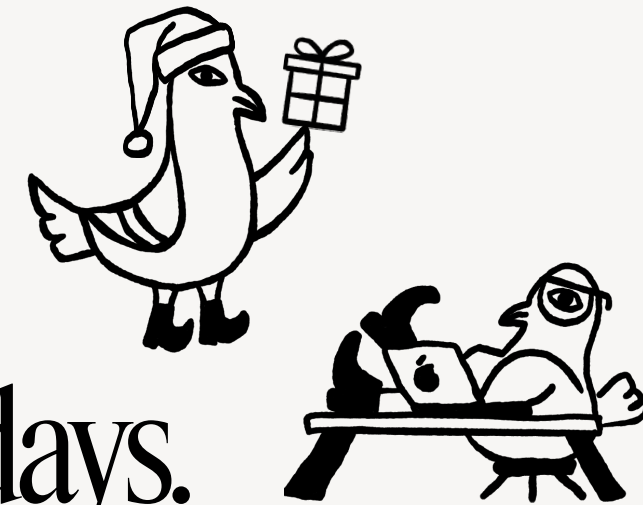
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A Tale of Two Holidays

In ecommerce, and in the English-speaking world, there are generally two kinds of holidays.

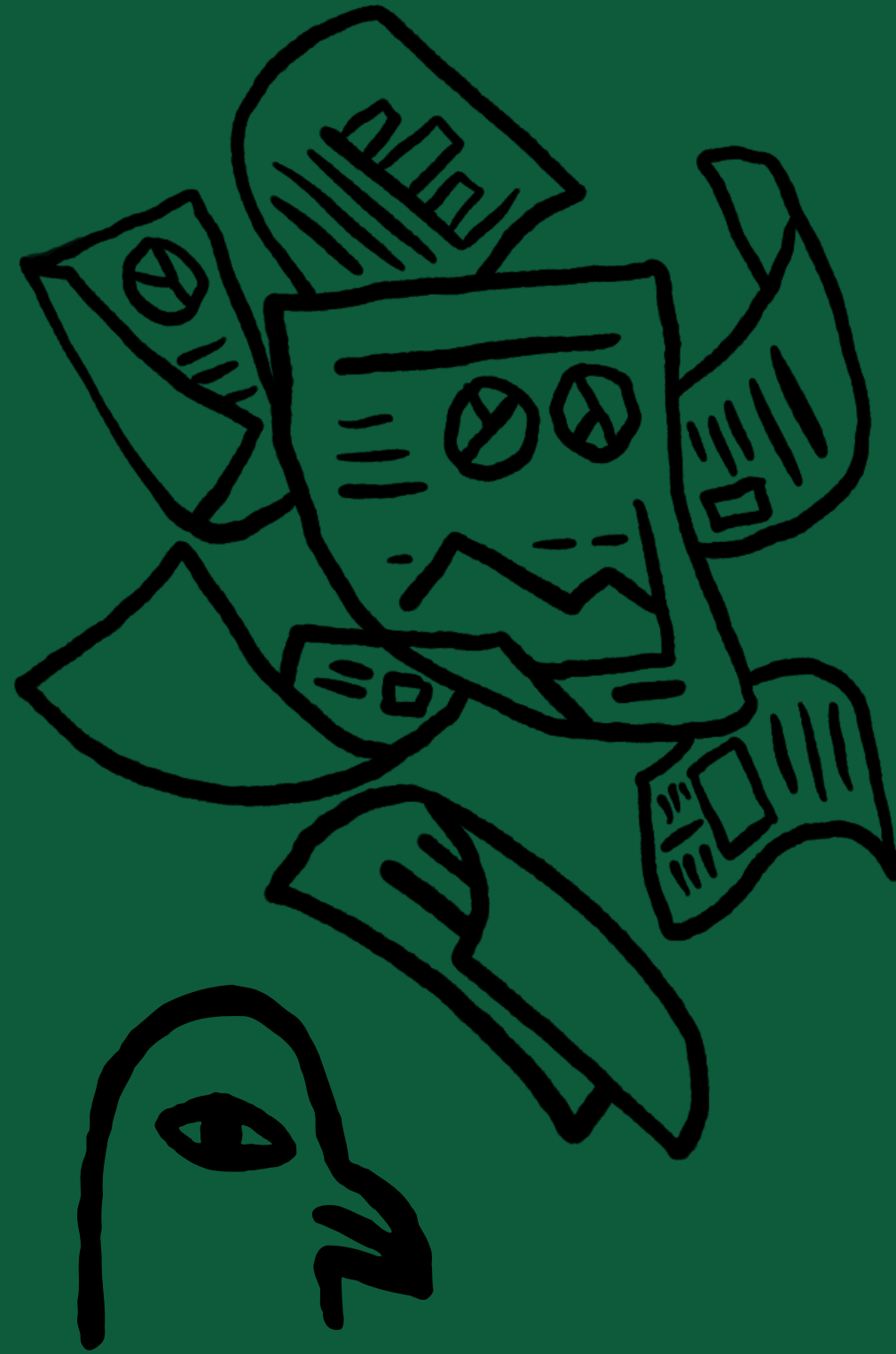


There's **a holiday**, as in the beach-lounging, out-of-office autoreply kind, and in the U.S. there's **the holidays**—Thanksgiving, Christmas, Black Friday, and Cyber Monday, among many others, which represent the global gifting season and peak for consumer activity.

While summer holidays are currently underway, and OOO's are popping up around the globe, it's a crucial planning period for making—and keeping—all of the holiday shopping season wins in Q4.

This playbook isn't just for early planning—it's for setting up a strategic way to keep growing even in a landscape shaken by tariff changes, supply chain blockages, and shifting consumer behaviors. All of these considered, a successful holiday season in ecommerce this year is the gift that keeps on giving in the next.

What we've learned at Swap from powering global ecommerce brands like **Manors Golf**—who turned operational chaos into 140% YoY growth—has been broken down into **5 key steps** to help you scale smart through summer and turn that into a successful winter.



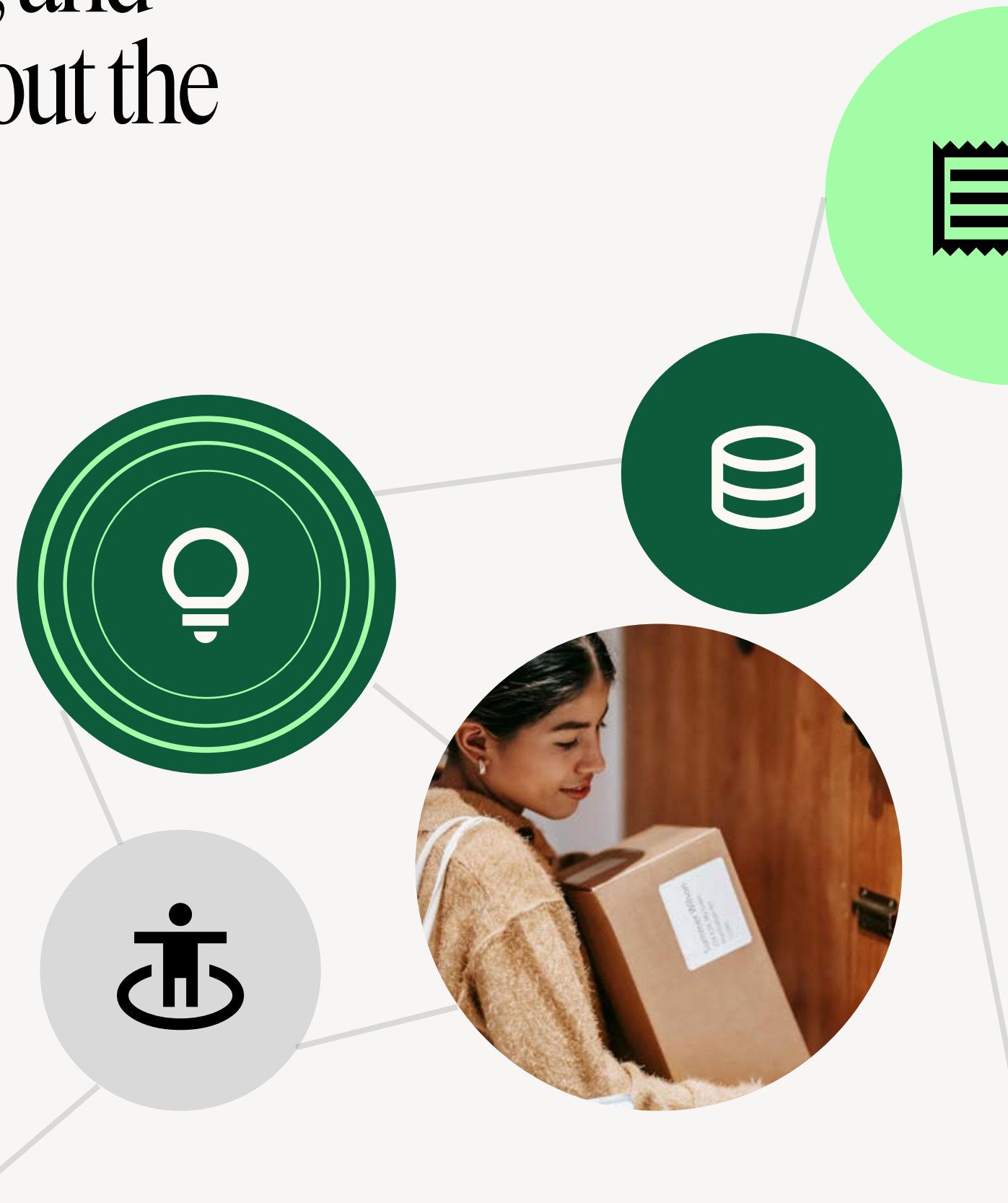
STEP

1

Learn to
Leverage
Your Data

A big summer opportunity in ecommerce is the chance to quietly collect, clean, and segment your customer data—without the pressure of peak-season.

During the slower engagement periods of July and August, you can focus on filling up customer profiles, mapping behavior, and establishing automated triggers that will power the most effective holiday campaigns later on. This isn't just theoretical, it's backed by the numbers. According to McKinsey, brands that deploy **personalized campaigns** can see **5 to 8 times the (Return on Investment) ROI on their marketing spend** compared to generic messaging. But personalization only works when it's built on a foundation of clean, segmented data, which takes time to gather.



Summer gives you that time. By implementing **seasonal sales, quizzes, or targeted sign-up incentives**, you can start identifying gifting behaviors early—like who buys for themselves versus who’s likely to give, who responds to bundles, discounts, or exclusive access. For example, ecomm retail giant, **ASOS runs highly targeted micro-campaigns** during their summer markdowns, each tailored to different demographics, styles, and purchase histories. The engagement data collected from these campaigns then **feeds directly into their holiday flows**, optimizing everything from abandoned cart emails to personalized ad retargeting.

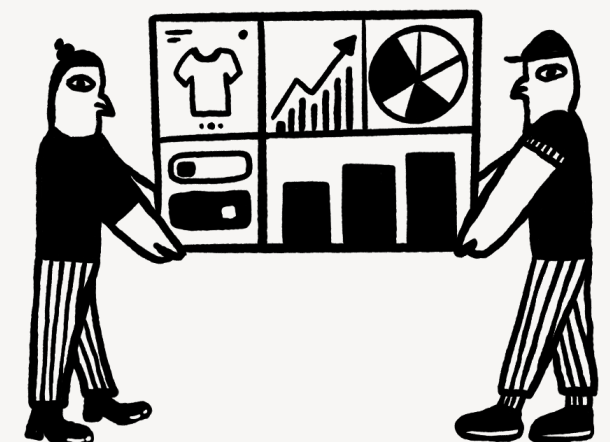
By the time Black Friday rolls around, brands that started early aren’t scrambling—they’re executing pre-built, highly customized journeys designed months in advance. Treat summer as your data runway, and you’ll have the ultimate gift-ready strategy come winter.

CHECKLIST

- ☐ Review last year’s data to understand high-return items, shipping cutoffs, and conversion triggers.
- ☐ Map your Q4 calendar now—secure promo slots, ad inventory, and logistics deadlines.
- ☐ Optimize your mobile site and uptime (Google research shows 53% of users abandon sites that load in over 3 seconds).
- ☐ Build your customer support workflows and test your fulfillment readiness with mock sales.



Available with Swap Global





RETAIL EXAMPLE

Brands that planned their campaigns before August saw a 21% higher ROI in Q4.

30%

more Q4 traffic for holiday messaging starting late summer

17%

higher open rates for pre-October campaigns

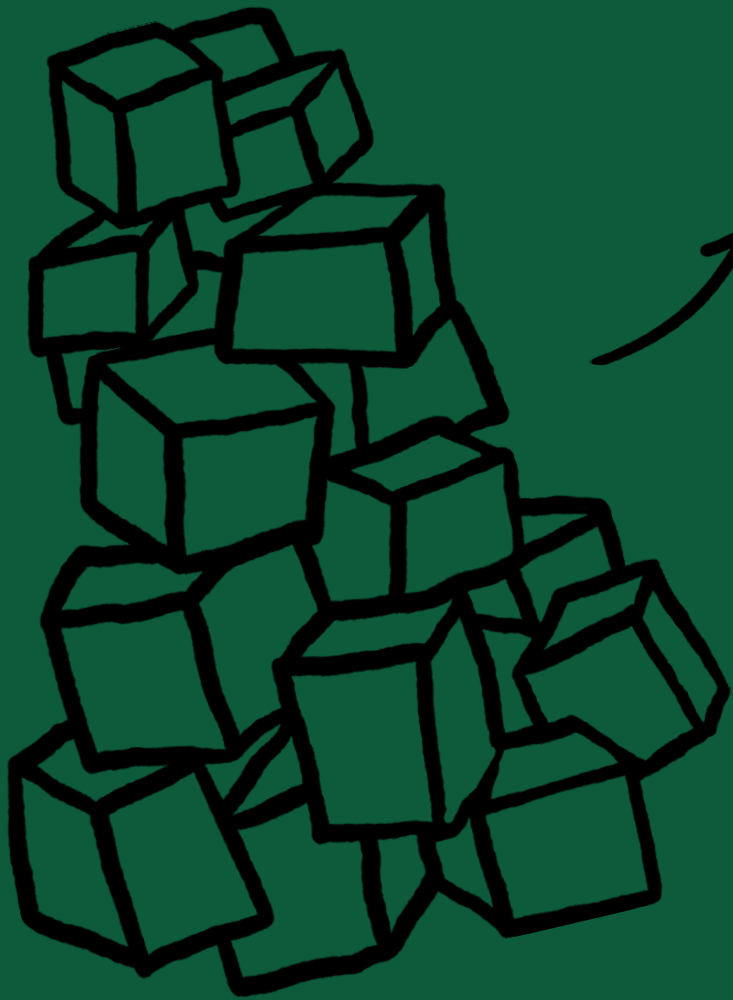
According to **Deloitte’s 2024 Holiday Retail Survey**, brands that planned their campaigns before August saw a 21% higher ROI in Q4 compared to those that launched later. This finding highlights just how critical early action is—not just for logistics and inventory, but for marketing strategy as well. Brands that invest in **early campaign planning** have more time to A/B test creative, fine-tune targeting, and build robust retargeting funnels. They also benefit from more favorable ad rates before CPMs spike in the crowded Q4 bidding landscape.

Additional research from Adobe Analytics reinforces this trend, revealing that brands that start promoting **holiday messaging in late summer capture nearly 30% more top-of-funnel traffic in Q4**. Meanwhile, Shopify’s global holiday commerce report shows that email **open rates for pre-October campaigns are 17% higher than those launched in November**, likely due to less inbox fatigue.

For brands looking to win big during the holiday season, July and August aren’t “down time”—they’re prime time to set the stage for fourth-quarter success. Early planning doesn’t just deliver better performance—it also gives you more time to **iterate, learn, and scale what works**.

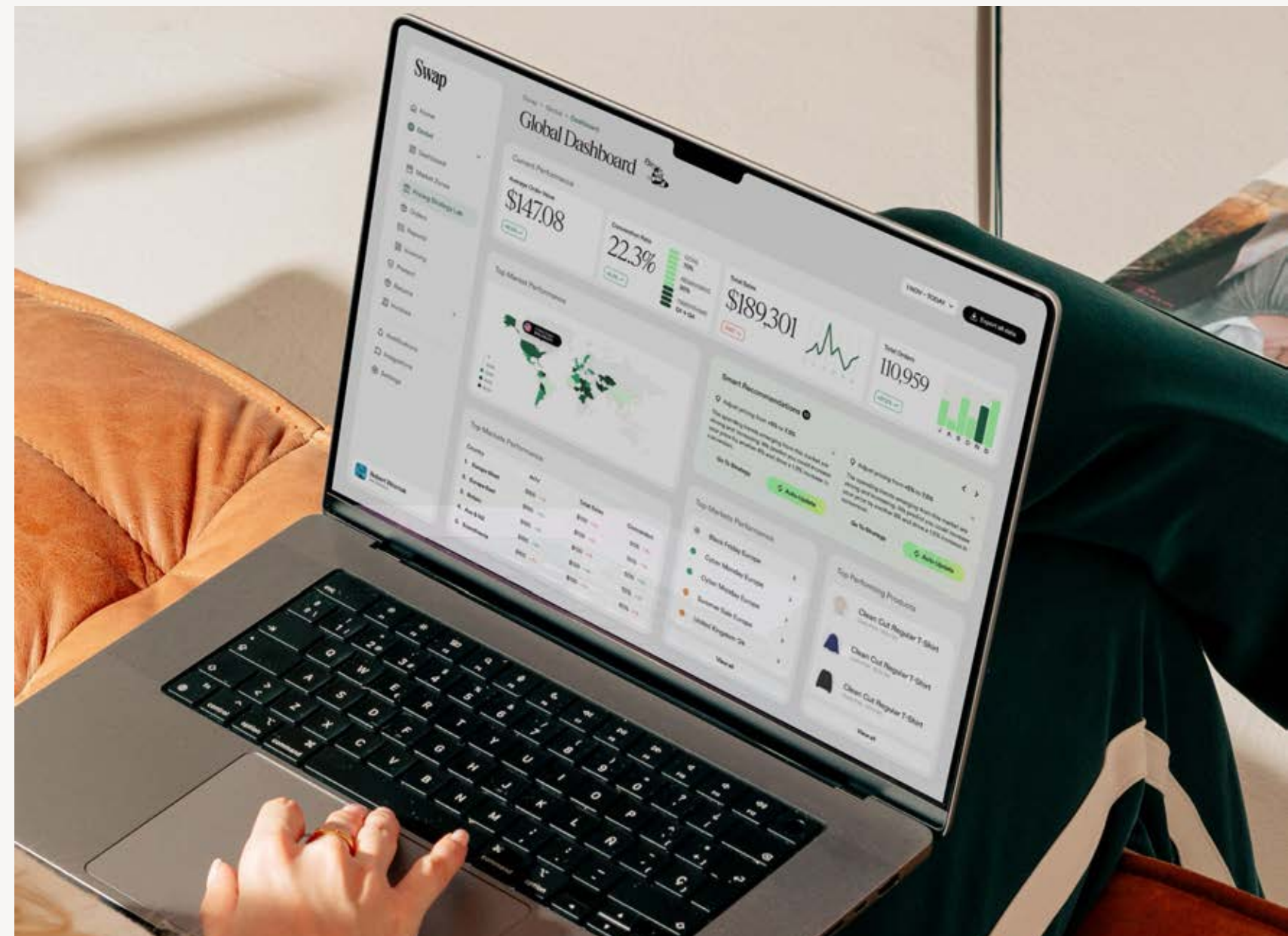
STEP 2

Turn
Returns into
Revenue



One of the smartest moves brands can make in July is to *investigate what broke last year*—returns, logistics, and cutoff misfires.

Starting with the setbacks is what will get you to a proactive fix. July is the ideal time to review Q4 2024 performance data in detail. Questions like, where did return rates spike unexpectedly? Which warehouses or carriers caused the biggest fulfillment delays? Which SKUs sold out way too early, leaving money on the table? These data points are the roadmap to a smoother, more profitable peak season.



During Black Friday/Cyber events, 76% of consumers said that free returns were “a key factor” in choosing where to shop, according to the National Retail Federation. Considering returns represented 17% of total 2024 sales, having smart and efficient returns management in place is the differentiator in the market. What’s a big example of this? Nordstrom. The company used the slower summer months to completely overhaul their returns infrastructure. By Q4, their automated return workflows—introduced through a summer revamp—helped **cut processing costs by 38%**, according to NRF’s 2024 report.


These large enterprise moves are a blueprint. Every brand, no matter its size, can use July to **identify last year’s weak points and build buffers and fail-safes** now—before the stakes go up with order volume.



Make January your most loyal month

Returns are inevitable, but how you manage them determines whether you lose money—or win trust.

CHECKLIST

- ☐ Use branded self-serve portals to reduce support load.
- ☐ Offer store credit and exchanges by default to retain revenue.
- ☐ Automate real-time return tracking and communication.
-  Available with Swap Global



RETAIL EXAMPLE

In 2024, returns cost retailers \$890B—with reverse logistics eating up 30% of operational costs.

16.9% average apparel/
footwear return rate

~50% reduction in return
rate through intelligent
return flows

In 2024 alone, U.S. retailers lost a staggering \$890 billion due to returns, according to data from the National Retail Federation (NRF)—a figure that continues to rise as ecommerce becomes increasingly global and gifting seasons stretch longer. More alarmingly, **reverse logistics now account for up to 30% of a brand’s total operational costs**, making post-purchase strategy not just a service issue, but a profitability imperative.

Apparel and footwear brands are particularly vulnerable, with industry-wide return rates hovering around 16.9%. But Swap-powered brands like Manors Golf have managed to flip the script. By building intelligent return flows with options for instant exchanges, store credit, and localized logistics, Manors brought their return rate down to just 6–8%—a dramatic reduction that directly **protects profit margins and customer lifetime value**.

During the high-stakes winter holiday season, when gift returns surge, brands that have already optimized their returns in July are the ones best positioned to retain revenue, avoid operational gridlock, and keep customers coming back. That’s why investing in smarter post-purchase operations **during the quieter summer months** is essential.



STEP 3

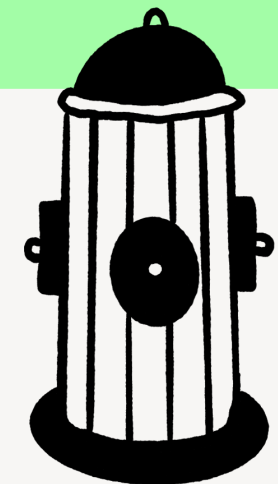
Build a
Tariff-Proof,
Resilient
Supply Chain

Global trade policy is in flux and geopolitical tensions are reshaping shipping lanes. Your Q3 supply chain decisions could determine your Q4 profitability.

Reviewing your logistics strategy now means assessing costs, customs unpredictability, and port congestion, which can turn your best holiday plans into expensive delays. According to **Deloitte's 2025 Global Retail Outlook**, brands that adopted **tariff-aware shipping strategies**—including Delivered Duty Paid (DDP) models and diversified regional sourcing—**cut lead times by as much as 35%** and maintained tighter control over landed costs. Tools like **Swap Global** and **Clear** also allow brands to surface duties and taxes at checkout, automate customs documentation, and reroute shipments through regional fulfillment centers.

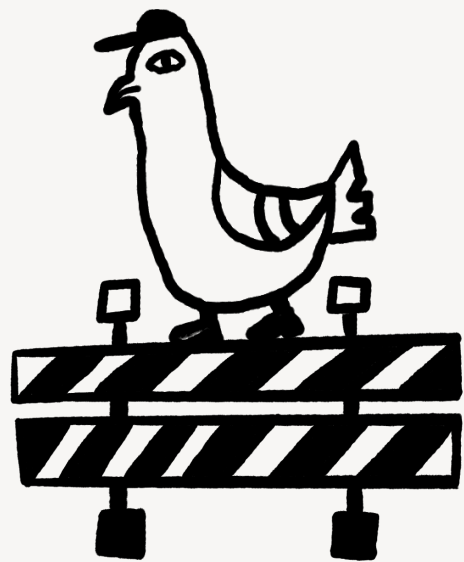
Up to **35%**

reduction in lead times by adopting tariff-aware shipping strategies



A prime example: **Everlane** preemptively shifted part of its sourcing from Southeast Asia to Mexico to soften the blow of impending tariffs, while simultaneously implementing DDP workflows to maintain delivery speed and protect the customer experience during the 2024 holiday season. They not only **preserved margins**, but also **avoided the post-purchase friction caused by surprise fees**.

For brands aiming to win in Q4 2025, tariff-proofing isn't just about compliance—it's a competitive advantage that **makes products arrive on time** with no surprises, and at the margin you forecasted.



Logistics can't break when sales take off

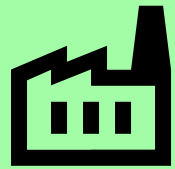
In 2025, your supply chain isn't just a cost center—it's your growth engine. With global tariffs shifting, brands must balance sourcing, speed, and cost transparency.

CHECKLIST

- ☐ Diversify suppliers and shipping routes.
- ☐ Offer DDP pricing (Delivered Duties Paid) to avoid surprise customer fees.
- ☐ Use bonded warehouses and tools like Clear by Swap Global to streamline customs clearance.



Available with Swap Global



RETAIL EXAMPLE

Brands like Allbirds responded to tariff adjustments on China-made goods by shifting manufacturing partially to Vietnam and Mexico.

In May 2025, the United States announced a new wave of tariff adjustments on China-made goods, creating fresh uncertainty for brands heavily reliant on Chinese manufacturing. In response, companies like **Allbirds** took strategic action early—shifting parts of their production to Vietnam and Mexico to reduce exposure to rising import costs and mitigate lead time volatility. By **using the summer months to diversify their supply chain**, Allbirds not only insulated themselves from sudden policy swings but also **gained greater operational control** heading into the high-stakes winter holiday season.

This move underscores a critical lesson for all ecommerce operators: **use Q3 to future-proof your supply network**. Brands that audit suppliers, explore nearshoring options, and reduce dependency on a single region during the quieter summer months will be in a better position to deliver reliably and profitably when Q4 pressure peaks.

(Source: Retail Dive)



HYDROS: TACTICAL PREP FOR BACK-TO-SCHOOL AND BEYOND

In early June, **Retail Brew** profiled Hydros—a direct-to-consumer water filtration brand—fast-tracking inventory and promotional strategy to brace for both Amazon Prime Day and the back-to-school season. Hydros’s founder, Winston Ibrahim, confirmed the urgency: they recently placed orders with Asian manufacturers to top off inventory in time for aggressive Prime Day deals.

He emphasized that back-to-school shoppers are intensely value-driven right now, and that Hydros is preparing by locking in supply and introducing stripped-down, lower-price-point SKUs to meet demand. The lesson is clear: retailers aren’t waiting until Q3—they’re executing a summer surge to lock in profits and market share ahead of Q4 pressures.

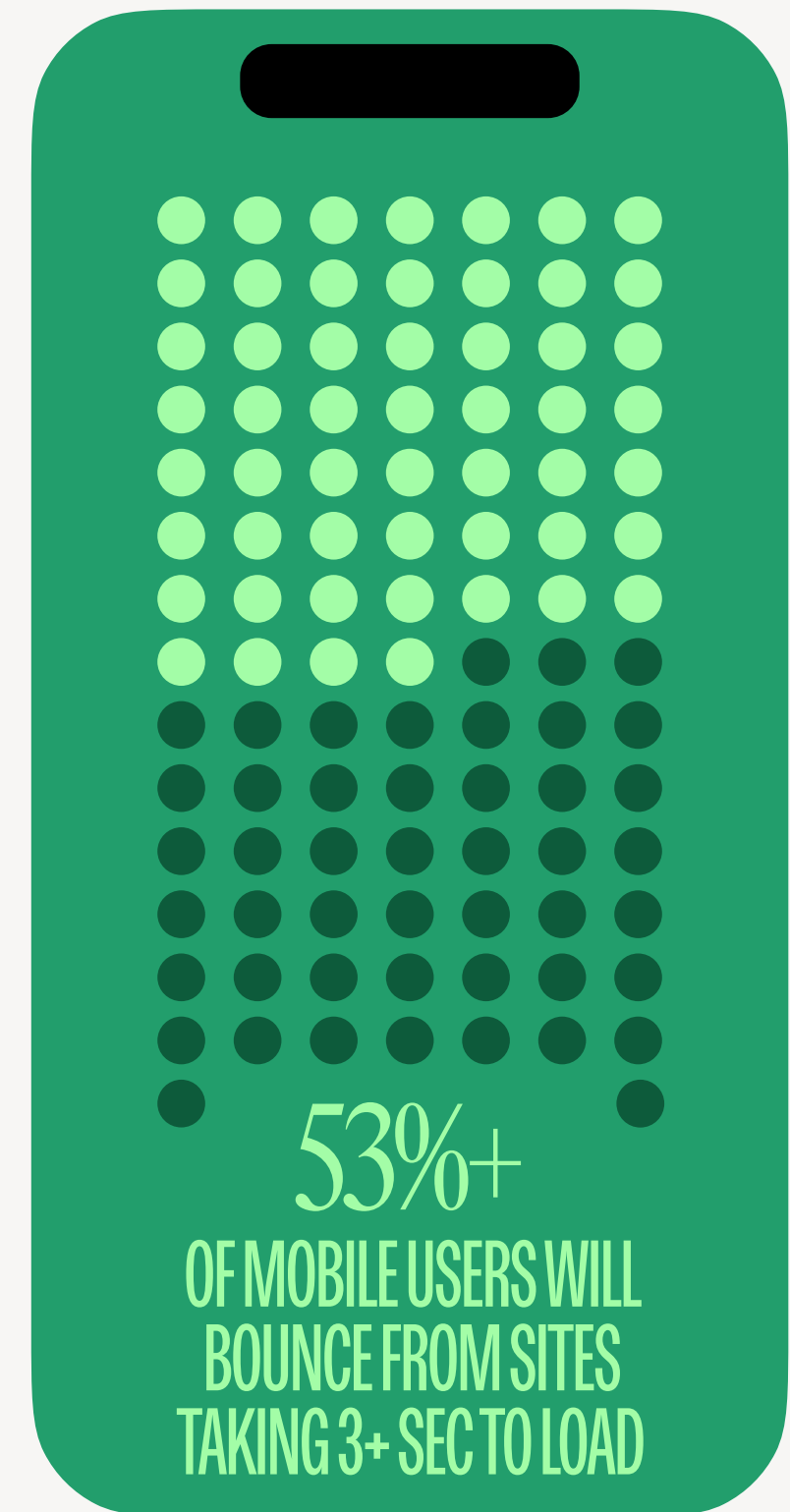
Segment, Personalize, and Automate



STEP
4

The summer lull is the perfect time to *optimize your ecommerce site* for easy-conversion in Q4.


Start by refining the user experience—especially on mobile, where **over 60% of holiday shopping** now takes place. According to **Google**, **53% of mobile users will bounce from a site that takes longer than three seconds to load**, meaning speed is crucial. Brands should also focus on AOV-boosting strategies like gift bundles, curated gift guides, and wishlist functionality that allows early shoppers to save favorites for later. Adobe reports that cart abandonment rates decrease significantly when shoppers are provided with **clear gift options and delivery timelines**, which becomes even more important during high-pressure gifting windows.

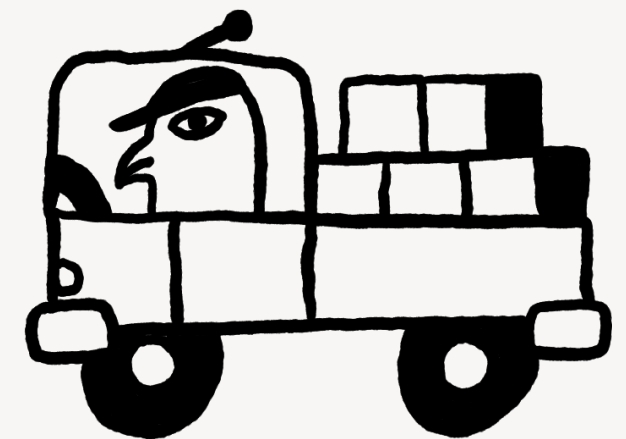


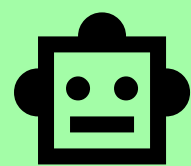
In 2023, **Marks & Spencer** leaned into this by rolling out a **mobile-first wishlist tool** and prominent gifting filters. The result? A **12% lift in gift-related conversions by mid-November**. But great UX is only half the battle. Smart shipping setups are just as critical. That means updating your shipping calendars, surfacing last-delivery deadlines early, and enabling DDP options to prevent cross-border delays or surprise fees—especially for international customers. A smoother shopping and shipping experience **reduces post-purchase anxiety, minimizes returns, and builds customer trust** when it matters most. For brands eyeing Q4 profits, now is the time to make your site and shipping systems do the heavy lifting—before the rush hits.

The best holiday marketing doesn't start in November—it's already A/B tested by then. Use summer to **build smarter segments and tailor your CX**.

CHECKLIST

- ☐ Start collecting zero- and first-party data (email capture, wishlist, quiz flows).
- ☐ Use AI tools to create personalized product recommendations.
- ☐ Launch “gift-finder” quizzes to gather preference data early.
-  Available with Swap Global





RETAIL EXAMPLE

Brands like Nordstrom and Selfridges began running holiday gift guides in July 2024.

43%

begin holiday shopping by late-October

In July 2024, major retailers like **Nordstrom** and **Selfridges** took a bold step by launching their holiday gift guides five months ahead of peak season. This early move wasn't just about jumping the gun—it was a strategic **shift toward shaping consumer behavior** long before the seasonal noise began. By doing so, both retailers saw a **33% increase in early engagement**, giving them valuable data on product interest, gift category performance, and promotional responsiveness **well before Black Friday**. This foresight allowed them to refine inventory allocation, avoid overstock on slow movers, and double down on popular bundles and price points by the time Q4 rolled in.

Their results echo a broader trend: according to the **National Retail Federation**, 43% of shoppers in the U.S. begin their holiday gift-buying by the end of October, and many respond more favorably to **curated, inspiration-led content like gift guides over traditional discount messaging**. For brands looking to win big in the high-stakes winter season, launching summer gift guides is more than a marketing play—it's a merchandising advantage. It sets the stage for optimized stock levels, smoother fulfillment forecasting, and repeat engagement that compounds through Q4.



STEP

5

Turn Post-
Purchase
into Loyalty

The summer holiday period is the perfect time to *rewire your post-purchase system* ahead of Q4, when return volume peaks.

With platforms like Swap Returns, brands are turning January's dreaded influx of return requests into a strategic opportunity. By offering instant store credit, flexible exchange options, and automated flows that reduce pressure on customer service teams, merchants can **shift from a loss-prevention mindset to a revenue-recapture one**. This matters more than ever: according to **WeSupply Labs**, the **average return costs retailers up to \$65.50** when accounting for fraud, shipping, restocking, and labor.

\$65.50



Average cost of a
return for retailers


But brands that embrace **smart returns systems** can recapture up to **25% of that lost revenue**. A strong example of this in action is Allbirds, which implemented intelligent return automation and saw **20% more exchanges**, a **50% reduction in manual processing**, and a measurable **lift in customer lifetime value**. These results aren't outliers—they're the new standard. Brands preparing now, during the summer holiday lull, can roll out optimized returns workflows ahead of peak season, ensuring they don't just survive post-holiday fatigue, but actually grow stronger because of it.



The real gifting season starts after checkout

Gifting creates emotional connections. Post-purchase flows are your moment to make them last.

CHECKLIST

- ☐ Add package protection like Swap Protect to increase trust.
- ☐ Send post-purchase content (e.g., styling tips, unboxing guides).
- ☐ Automate CSAT/NPS surveys post-return to uncover friction.
-  Available with Swap Global



RETAIL EXAMPLE

Forbes reports that 50% of online shoppers return at least one item per year—yet 80% of them are willing to buy again if the return experience is easy.

96% of shoppers would return after easy returns

69% hesitate to purchase with unclear return policy

This insight alone reveals just how much of Q4’s profitability hinges not only on what gets sold, but what happens after the package lands. Returns aren’t just a cost center—they’re a **critical moment of truth**. During the high-stakes holiday season, when gifting errors and fit issues spike, brands that fail to offer **seamless, transparent return options** risk losing both sales and loyalty.

According to data from Narvar, **96% of shoppers who had a smooth return experience say they would shop with the same brand again**, and **69% say they’re deterred from buying when return processes are unclear**. That’s why smart brands use summer to **audit, refine, and automate returns**—not just to reduce costs, but to protect future revenue.

With the right tools, like **Swap Returns**, brands can turn post-holiday refunds into exchanges, store credits, or even subscription opportunities—turning a potential loss into lasting customer value.

WAYFAIR'S "BLACK FRIDAY IN JULY" KICKOFF

On June 13, **Retail Brew** reported that Wayfair launched its "Black Friday in July" promotion, offering steep discounts—up to 80%—on furniture and appliances. This mid-summer deployment mirrors earlier efforts from Best Buy and LG, reinforcing the tactic of seeding holiday mentalities months early.

Wayfair's strategy demonstrates how brands are using July promotions to capture early consumer attention, drive volume, and gather valuable behavioral signals that inform stronger Q4 targeting.

Swap

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