

# EOFY Made Easy:

## The Ultimate Checklist for Sales, Stock & Success!

For wholesalers, distributors, and manufacturers, EOFY is more than just balancing the books – it's a chance to optimise your sales, stock, and customer management for a profitable year ahead. By automating key processes with a stock-aware CRM, you can reduce manual admin, improve accuracy, and make smarter business decisions.

Use this checklist to ensure nothing falls through the cracks as you prepare for EOFY

### Sales & Finance:

- Follow up on outstanding quotes to close last-minute deals
- Run sales reports to identify top products & customers
- Chase overdue invoices & reconcile payments
- Assess profit margins & customer profitability

### Stock & Inventory:

- Review stock levels & clear slow-moving items
- Sync inventory data across systems
- Forecast demand based on past sales trends

### Customer Review:

- Segment customers for targeted EOFY campaigns
- Automate follow-ups & re-engage inactive customers
- Identify cross-sell & upsell opportunities

### Quote-to-Order Process:

- Streamline quotes & automate approvals
- Sync sales & financial data across platforms
- Automate sales forecasting & reporting

### Plan for the Year Ahead:

- Set sales & revenue targets using CRM insights
- Identify inefficiencies & implement automation
- Optimise pricing & discount structures
- Invest in tools that boost efficiency & profitability

### Take the Stress Out of EOFY with Prospect CRM:

- Automate sales & stock processes
- Keep data in sync across all systems
- Speed up quotes, orders & purchase workflows
- Improve forecasting & customer profitability

**Start the new financial year stronger!**  
**Try Prospect CRM free for 14 days.**