

YEAR-END REVIEW *Workbook*

BUSINESS NAME:

A workbook designed to guide you through a year-end
review and planning session

VALUES & CULTURE

CREATE A POSITIVE, HEALTHY, THRIVING BUSINESS

Rewrite your Vision & Mission Statements and highlight your values

Vision Statement

Mission Statement

Company Values

Integrity	Health	Accountability	Passion	Community	Humility
Boldness	Trust	Teamwork	Education	Fun	Diversity
Ownership	Quality	Commitment	Excellence	Leadership	
Innovation	Improvement	Results-Oriented	Openness	Simplicity	
Honesty	Global	Professionalism	Charity	Ethics	Human
Factualness	Collaboration	Belonging	Hard Work	Sustainability	
Boldness	Customer-Obsession	Employee Development	Creativity		
Discipline	Care	Focus	Transparency	Respect	Growth
Courage	Delight	Fast-Learning	Communication	Mindfulness	
Responsibility	Impact	Service	Idealism	Speed	Hospitality

FINANCIAL REVIEW

FINANCIAL REVIEW CHECKLIST

- Review Profit & Loss, Balance Sheet and Cash Flow Statements.
- Check all outstanding accounts and make sure they are paid.
- Check accounts receivable and send out notices where applicable.
- Review budget, note any areas that were off and make adjustments.
- Review expenses and make any necessary adjustments.

PROFIT & LOSS REVIEW

- Note totals and changes below

Sales	% Change
\$ <input type="text"/>	+/- <input type="text"/> % <input type="text"/>

Expenses	% Change
\$ <input type="text"/>	+/- <input type="text"/> % <input type="text"/>

Income	% Change
\$ <input type="text"/>	+/- <input type="text"/> % <input type="text"/>

Profit	% Change
\$ <input type="text"/>	+/- <input type="text"/> % <input type="text"/>

SALES REVIEW

PROFITABILITY BREAKDOWN

Most profitable product/services?	Least profitable product/services?
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SALE CHANNEL

Note sales by channel and which channel generated the highest sales

In-person

% Change

\$

+/-

%

Website

% Change

\$

+/-

%

Social Media

% Change

\$

+/-

%

Other:

% Change

\$

+/-

%

What adjustments do I need to make to my offerings?

Review Pricing and make any necessary adjustments.

MARKETING REVIEW

OWNED & AWARENESS ASSET GROWTH CHECK

Note growth of each asset & the change compared to the previous year

Asset	Followers, Subscribers	% Change
EMAIL LIST		
FACEBOOK		
INSTAGRAM		
YOUTUBE		
TIKTOK		
PINTEREST		

MARKETING REVIEW

PAID AD TACTICS REVIEW

Note your Top 3 Paid Ads and results per Ad

Asset	#1	#2	#3
GOOGLE ADS			
FACEBOOK			
INSTAGRAM			
YOUTUBE			
TIKTOK			
PINTEREST			

MARKETING REVIEW

CONTENT MARKETING TACTICS REVIEW

Note your Top 3 performing content pieces per asset

Asset	#1	#2	#3
EMAIL LIST			
FACEBOOK			
INSTAGRAM			
YOUTUBE			
TIKTOK			
PINTEREST			

MARKETING REVIEW

CONTENT MARKETING REVIEW BY TYPE

Note stats on your content types

Type of content	Number of posts, videos, episodes published	Engagement, views, downloads
BLOG		
PODCAST		
VIDEOS		

CONTENT MARKETING TOP 3

Note your Top 3 pieces of content by type

BLOG

PODCAST

VIDEO

WEBSITE REVIEW

GOOGLE ANALYTICS REVIEW

- Note the change in your unique visitors

Unique Visitors

% Change

Avg. Monthly Visitors

+/-

Conversion rate

% Change

Traffic Origination

+/-

MINI WEBSITE AUDIT

- Make sure your brand one-liner is accurate and clear
- Make sure your site imagery is on brand
- Make sure your CTA's are clear and working properly
- Make sure all links work
- Make sure all contact information is up to date
- Make sure all event, menu, pricing is up to date

What updates can you make to your site to improve the user experience and increase conversion?



GROWTH REVIEW

ANALYZE THIS YEAR'S CUSTOMER GROWTH

Total # of customers	% Change
<input type="text"/>	<input type="text" value="+/-"/>
# of leads	% Change
<input type="text"/>	<input type="text" value="+/-"/>
# of new customers	% Change
<input type="text"/>	<input type="text" value="+/-"/>
Conversion	% Change
<input type="text"/>	<input type="text" value="+/-"/>
Customer retention	% Change
<input type="text"/>	<input type="text" value="+/-"/>

What new product or service offerings did you have this year?

-
-
-

Event/Program Attendance

Event	Attendance	Reached Goal?
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



REVIEW QUESTIONS

ANALYZE WHAT WORKED AND DIDN'T WORK

What specific actions helped you make the greatest impact (wins, successes, achievements)?

-
-
-

What specific actions taken this year were a waste of time (mistakes, failures, disappointments)?

-
-
-

What recurring actions taken this year could be delegated to an assistant or systemized to take up less of your time?

-
-
-

What specific moments this year brought the most fulfillment?

- -
 -
-



REVIEW QUESTIONS

ANALYZE WHAT WORKED AND DIDN'T WORK (CONTINUED).

What specific moments this year brought the most stress?

-
-
-

Did we have unexpected expenditures and how can we plan better for next year?

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-
-

How successful and effective did you find this year?

-
-
-

Additional notes on this year:





GOAL REVIEW - 2022

ANALYZE 2022 GOALS

What were your goals for 2022?

- -
 -
-

What goals were achieved and why?

- -
 -
-

What goals didn't get reached and why?

- -
 -
-

What goals did you eliminate or need to let go?

- -
 -
-

GOAL REVIEW - 2022

REVIEW FINANCIAL GOALS (* next to the goals you reached)

Income

Expenses

Profit

REVIEW MARKETING GOALS (* next to the goals you reached)

What were your growth goals in 2022 for each asset?

Email List

Facebook

Instagram

YouTube

TikTok

Pinterest

REVIEW GROWTH GOALS * next to the goals you reached

What were your growth goals for each phase of the sales funnel last year?

New leads

New Customers

Conversion rate

What new products or service offerings did you launch?

What new events or programs did you launch?

Event

Attendance Goal



GOAL REVIEW - 2022

REVIEW SALES GOALS (* next to the goals you reached)

Overall Sales

In-Person

Website

Sales by Product/Service

Additional notes on this year's sales:

GOAL SETTING - 2023

SET GOALS FOR 2022

What are your Top 3 goals for 2022?

Goal #1

Goal #2

Goal #3

Target Date

Target Date

Target Date

Action Steps

Action Steps

Action Steps

How will you overcome obstacles to achieving this goals?

- -
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-

GOAL SETTING - 2023

FINANCIAL GOALS

Income

Expenses

Profit

MARKETING GOALS

Note your growth goals for each asset

Email List

Facebook

Instagram

YouTube

TikTok

Pinterest

GROWTH GOALS

Note your growth goals for each phase of the sales funnel

New leads

New Customers

Conversion rate

What new products or service offerings will you launch?

Event

Attendance Goal

What new events or programs will you launch?



PLANNING QUESTIONS

ANALYZE HOW TO APPROACH THE NEW YEAR.

How do you plan to do MORE of those impactful actions in 2023?

-
-
-

What items do you plan to do less of or avoid completely in 2023?

-
-
-

How will you delegate or systemize recurring actions for your business so that you can spend more time on activities that matter?

-
-
-

How do you plan to create more moments of victory and fulfillment in 2023?

- -
 -
-



PLANNING QUESTIONS

ANALYZE HOW TO APPROACH THE NEW YEAR (CONTINUED).

How do you plan to reduce or handle stressful situations in 2023?

-
-
-

How will you define a successful year for 2023?

-
-
-

Additional notes on the upcoming year:

