

ANNUAL PLANNING - REVIEW CHECKLIST

Work through each one and ask yourself:
What worked well and what didn't?
What would I like to do differently?

BUSINESS SIDE

ADMINISTRATION

- Calendar
- Email
- Job Description
- Professional Development
- Time Management

FINANCE

- Budget
- Expense Review
- Goals

MARKETING

- Advertising / Marketing
- Brand & Identity
- Business Cards

OPERATIONS (BUSINESS SYSTEMS)

- Business Model
- Processes & Systems
- Snags or Barriers

OPERATIONS (PRODUCTS & SERVICES)

- Review of Pricing
- New Product Development

PEOPLE

- Professional Development
- Team Members
- Vendors

SALES

- Consultation
- Execution

TECHNOLOGY

- Domains
- Email Addresses
- Hosting
- Internet Service
- Passwords
- SEO
- Telephone Service
- Website

VEHICLES

- Annual Check-up
- Tires

VOLUNTEERING

Give some thought to whether you're over-committed. Are you over-volunteered and stressed? If so, take the time to choose which are your favorites and begin to work on an exit plan for those positions you'd like to give up.

PERSONAL SIDE

ACCESSORIES

- Business Card Holder
- Briefcase
- Cell Phone / Cover
- Eyeglasses
- Jewelry
- Pen
- Purse

CLOTHING & SHOES

- Color / Patterns
- Style

HAIR

- Cut / Style
- Products

OFFICE

- Accessories: lamps, plants, rugs, furniture
- Artwork / Wall Hangings
- Certificates / Awards
- Desk Accessories
- Filing Systems
- Layout of office
- Location

PERSONAL

- Facial Hair
- Makeup
- Nails
- Teeth

TRANSPORTATION

- Car Wrap
- Cleanliness
- Hubcaps
- Type of Vehicle