



YEAR END CHECK LIST FOR ALL BUSINESS OWNERS

*For business owners, year end is one of the best times of the year.
 You can look back on all the things you have accomplished and think ahead to what you want to accomplish in the next year.
 You can analyze good decisions and not so good ones, compare your progress to your last year's plan and get new goals .*

Here are some things you should do before the year ends:

Review and assess your Marketing Plan.		
	Review marketing strategies used this year	
	Brainstorm about what you can do differently	
	Identify what worked and what didn't	
	Use marketing plan forms to list each method and the results	
	Spend at least one day analyzing and working on your marketing plan	
	List ways you will breathe new life into your plan for each month.	
	Set deadlines for completing marketing activities	
Thank your customers for this business this past year.		
	Take the time to thank customers who have supported your business with a call, card, small gift.	
	These small gestures toward customers are thought to be the secret sauce of business success.	
Thank your employees	Almost as important as #2...maybe more!	

for their work and support.	Show your appreciation for employees with Employee appreciation events, or celebrations.	
	Reward them with small gifts or other appreciative gestures.	
	Let them know how important they are to the success of your business	
Review financial reports.		
	Review year to date and year end Profit and Loss	
	Analyze performance to sales and benchmark %	
	Make adjustments in goals for coming year	
	Write off all receivables that are not collectable.	
	Make certain all numbers for current year are up to date and data entered If necessary, meet with your CPA to make certain you are taking advantage of all tax credits available to you	
Discuss your entity status with CPA; sole proprietor vs S Corp or C Corp		
Create new budgets for coming year.		
	Using current year performance, analyze each month to determine where sales and expenses should be	
	Set realistic goals for sales, cost of goods and expenses	
	Monitor each month and make adjustments quarterly	
Review Inventory.		
	Count equipment inventory and product supply level	
	Order new equipment or supplies necessary for the first quarter now	
	Order/purchase office supplies and equipment necessary for first quarter now	
Review Employee Related issues		
	Employee policy review	
	Staffing levels to accommodate planned revenue	
	Hiring strategies – what to change.	

Notes :

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