

Annual Planning Checklist

Personally my goal for the new year is to _____ and the reason this is important to me is _____

The most important strategy in my business for next year is _____ which helps me achieve my personal goal by _____

- Prepare annual marketing plan
- Finalize annual business calendar of events, seminar attendance and staff training plans and your time off
- Create wish list of capital improvements or new asset purchases for next year
- Establish quarterly business goals
 - 1st Quarter _____
 - 2nd Quarter _____
 - 3rd Quarter _____
 - 4th Quarter _____
- Prepare annual business operating budget
- Create cash flow forecast
- Set SMART goals: Personal & for your Business
- Confirm my plans and goals include self-care and time off so I recharge and have energy for success

The priorities for next year that I want to say “yes to” and will be the focus of my time and energy include: