

End of Year Review



As business owners and leaders, sometimes we get defeated by the day-to-day needs of the business and forget to look at the big picture of how far we have come. One of the most important things we have done since day one in business at Emerge is document our annual progress. During the tough times, looking back on all that we have accomplished is oftentimes the motivation we need to keep going! Use the questions below to review, evaluate, and celebrate the year that has come and gone, and prepare yourself and your business for the upcoming year.

STRATEGY & GOALS

Did I accomplish last year's goals? What needs to be carried over to this year? Do any goals need updated or revised?

What felt like a win this year? Any big highlights or celebrations?

What are my overall business goals and personal goals as a business owner or leader for this coming year? Add these goals to the list on the next page.

What is one BIG thing we can dream for 2025? Are there mini-deadlines or small goals I can set now to help us achieve that dream?

CUSTOMER FOCUS

Does our brand feel true to us and is it attracting our ideal customer?

 yes no maybe

If not, how can we accomplish that this year?

How satisfied were my customers?



How do I know? What feedback stood out, good or bad?

How well do customers perceive our products/services?



Are there any strategies I can implement to enhance their experiences?

Are there any strategies I can implement to improve my product or service?

How can we strengthen customer relationships this year?

Set goals to improve your customer perspective. Add these goals to the list on the next page.

OPERATIONS

Are our processes and systems as efficient as they could be?

 yes no maybe

What areas of waste did the business experience this year? delays, unused talent, processing, defects, overproduction, etc.

What processes and systems are slowing us down? Is there anything we should try to streamline?

Set operational goals for the year. Add these goals to the list on the next page.

STAFF DEVELOPMENT

How satisfied are my employees?



How engaged are my employees?



Is the employee retention rate good?

yes no maybe

Are we efficiently and effectively operating day-to-day?

yes no maybe

What could be improved?

Are there any trainings, development programs, or processes we need to implement?

yes no maybe

What is an effective way I can invest in employee development this year?

Rate the work culture.



What is going well with our culture? How can it improve?

Rate the work/life balance?



How can it improve?

Do I need to reward or recognize my employees for anything?

Set employee-related goals for the year.
Add these goals to the list at right.

FINANCIAL PERFORMANCE

Look over financial statements, income statements, balance sheets, and cash flow statements. Assess profitability, liquidity, and solvency.

How was our profitability this year?



Are there any unnecessary expenses we can cut back on? If so, what are they?

yes no maybe

In order to achieve our goals, do we need to financially invest in anything new this year?

Are there any cost-saving opportunities for us this year?

Are there any new revenue streams we should explore?

Set financial goals for the year.
Add these goals to the list at right.

NEXT YEAR'S GOALS