



# YEAR END BUSINESS REVIEW



# 2020 YEAR END REVIEW

What did you  
learn?

What was your  
greatest  
accomplishment?

Where do you feel  
there is room to  
improve?

# 2021 - LOOKING FORWARD

What do you hope  
to accomplish in  
2021?

Evaluate your target market

- who are they?
- what are their needs?

What would a  
successful 2021  
look like for your  
business?

# YEAR END CHECKLIST

## NOTES

### ● **Back up your computer**

This should be done weekly, but if you haven't backed up your computer in a while here is your reminder before something strange happens and you lose all your data.

### ● **Review and update website**

Take a stroll through your website or ask a friend to take a look at it and see if the information is current. Make sure that the pertinent information is easily found. Do you answer your most frequently asked questions?

### ● **Review social media accounts**

Take a look at your about page - is it up to date? Do your links connect people to where you want them to go? Do you need to update your profile picture?

### ● **Set revenue goals for 2021**

Goals give you something to strive for or a goal to attain. Set your revenue goals for the year or for each quarter. Keep those figures in your mind as you are planning your action steps for 2021.

### ● **Review your pricing structure.**

As you are finalizing your financial picture for 2020, are there changes that need to be made for 2021? Are you able to cover your additional costs from website purchases, shipping, delivery? Can you save money somewhere or will the cost need to be passed on to the consumer?

### ● **Plan vacation time.**

Schedule yourself some time off now. Protect that time. Take a look at STAT holidays throughout the year, what does that look like for your schedule. Can you afford to close your business for a week? Plan before the burn out.

# 2021 GOALS

Now that you have had a chance to review 2020 - you know what you learned, what you accomplished and what you need to improve. Now set monthly goals for 2021, you can break down your goals into the action plan in the following pages.

JANUARY

JULY

FEBRUARY

AUGUST

MARCH

SEPTEMBER

APRIL

OCTOBER

MAY

NOVEMBER

JUNE

DECEMBER

# 2021 ACTION PLAN

## JANUARY

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## FEBRUARY

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## MARCH

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## APRIL

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## MAY

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## JUNE

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

# 2021 ACTION PLAN

## JULY

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## AUGUST

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## SEPTEMBER

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## OCTOBER

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## NOVEMBER

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

## DECEMBER

IMPORTANT DATES:

-

-

-

-

TASKS / GOALS:

☐☐☐☐

# January

## CONTENT

Educational post

Something you are passionate about

Customer review

Share a "in case you missed it" post

Share your current window display

A recent blog post

Promote a local non-profit fundraiser

Favourite local shop -not yours

Do a "live" tour of your store

Recommend a local restaurant

Share an inspiring local story

Share your favourite Christmas recipe

Poll This or That

Before & After photo

Share an end of week success story

Thank customers for their support in 2020

Fun Fact about your or your shop

Inspiring quote

Share a client photo

Show behind the scenes/ unboxing of new product

Share a client success story

Tutorial How to directions that benefit your customers

Answer a common question

Throw back of your business

Share your why? Why did you start your business

Ask followers about content that they want to see

Favourite influencer

Ask followers to follow you on your other platforms

Stories: a day in the life

Share a thankful post