



CAREFREE Bookkeeping 2023 Closing the Year Review

What happened in 2023 that is memorable?

What brought you joy in 2023?

What were your successes in 2023?

What were you not able to accomplish in 2023 and what were the reasons? Where did you struggle?

What were business, home and life challenges in 2023?

What was the biggest thing you learned in 2023?

What do you want to leave behind and not repeat in 2024?

What do you want to bring forward into 2024?

When you look back at 2023, What are you grateful for?

What are some other things, personally or professionally, you want to remember about 2023?





2024 GOAL WORKSHEET

Goals need to be S.M.A.R.T.

- S = Significant or Stretching
- M = Meaningful or Motivational
- A = Achievable or Agreed Upon
- R = Relevant or Rewarding
- T = Trackable or Tangible

Think About Potential Obstacles

Time = What if I didn't spend time to do it

Money = Would I spend money if you see a real benefit to save you hours in your business

Staff Acceptance = Show the staff the benefits

A new year. A New chapter in your business and in your life.

What are the goals and dreams in chapter 2024?

Below write down your 2024 goals. You can have one or ten goals. This is designed to be a helpful tool to grow your business. Take your time and think about this. Ideas for goals (sales, production, organization, what do you want to improve, how do you want to grow?)

Why are you setting these goals?

To improve profitability, increase productivity, allow for scalability, allow for reporting, see visibility, clear expectations? Write in your reasons down.

What will your life look like when these goals are completed?



What do you want your business to look like in 5 years and in 20 years.

What are the small steps to reach these goals? (break it down) How are you going to reach your goal?

What is the time frame for the big goal and what is the time frame for the small steps to make your goals?

When are you going to review your goals and check to see if you are on track or if an adjustment needs to be made?

What tools do you need to reach your goals?

What obstacles are in the way of reaching your goals?

What can be done to make the obstacles go away?



What impact will be had on your personal or professional life as a result of reaching your goals?

What is your reward for reaching your goals?

When is your slow season? = Review your Sales Report by Month

What are you going to work on in your slow season?

What can you do so you don't have a slow season?

When will you be reviewing each goal to determine the indicators of its success?

CIRCLE ONE: Weekly Monthly Quarterly

Then, mark your calendar with appointments NOW!

Who will help you be accountable to your goals?

How will you track the progress of your goals?

To Whom or When will you reach out for help?



Business Foundation Planning describes what is currently in place and is missing or needs improvement right now. Review the following lists. Do the processes or systems you currently have in place still work or do they need to be adjusted or revamped altogether?

CIRCLE ALL THOSE THAT NEED TO BE CREATED, ADJUSTED, or OVERHAULED

BUSINESS FOUNDATION

1. My purpose for my business is clear and written
2. I know and can share my vision for my business
3. I have a 3-year strategy for my business
4. I know what my business looks like when it is done
5. I have a clear picture of the quality of life I expect my business to offer me
6. The culture I want in my business is clearly defined
7. The values of my business are defined and followed
8. I have a manual for all procedures that is updated regularly
9. My business has a contingency plan for emergencies
10. I am investing in growing assets outside of my business
11. I have an exit strategy in place

FINANCIALS

1. I know my break even daily/weekly/monthly
2. I know my gross profit
3. I have a working budget
4. I look at my bookkeeping reports monthly, quarterly
5. Have a system to monitor & use numbers in my business
6. I use a cash flow management system
7. I measure KPI's (Key Performance Indicators) for leaders and team members
8. I have a banker, CPA, Financial Planner who I know, trust and work with regularly
9. I have a minimum of 3 strategies in place to increase my gross profit
10. I have a marketing plan that is budget driven
11. I raise prices to handle increases in expenses

TIME MANAGEMENT

1. I know my 3 top roles I the business and how much time they require
2. I use a default Calendar that is updated each quarter
3. I schedule time for my life outside of the business
4. I schedule time to work ON my business at least weekly
5. I have a plan to create more leverage in my schedule
6. I respect my appointments with myself
7. I have a system to stop others from hijacking my time
8. My physical space (desk, etc) is organized for optional time use
9. I have a plan to outsource / delegate non-critical tasks



MARKETING

1. I know our USP (unique selling point) and use it in marketing
2. I have identified our target markets and know where to find them
3. I have the budget for our marketing plan
4. I have a marketing plan that feeds our revenue budget
5. I have at least 6 different marketing campaigns in our plan
6. I actively work with 3 strategic alliances who share our target market
7. I have a specific referral strategy in place
8. I have an online marketing strategy in place: social media, website
9. I collect complete contact information on all leads
10. My prices fit our target market
11. I have a meaningful guarantee in place that is published and use in all sales communication

SALES/SALES TEAM

1. Everyone on the team understand they ARE the sales team
2. My team understands the sales funnel and our steps through this
3. We know our conversion rate at each level of the funnel
4. The sales team follows the same sale procedure including scripts
5. The sales team knows and is held accountable for the sales goals
6. We know the number of leads needed to reach our sales goals
7. We know the length and steps of our sales cycle & it is documented
8. The sales team has regular training
9. I am responsible for providing sales projections
10. The sales team is held accountable to deliver on sales projections
11. We have written strategies and procedures in place to upsell, cross sell, and create repeat sales
12. The Sales team knows the targeted average dollar sale and are accountable to it

PRODUCT/SERVICE

1. My products are clearly defined and easy to describe to prospects
2. There are written procedures in place to ensure our products/services are delivered consistently
3. Our customers know what to expect from us and receive it always
4. I know what makes our product stand out from our competition
5. I survey our customers to determine what they are looking for
6. I have a plan to expand or niche our products
7. I have scripts in place for greeting customers & answering the phone
8. I regularly brainstorm as a team to find new ways to improve our customer's experience
9. I have a way to measure customer satisfaction that is easy to compare from season to season



PERSONAL GROWTH

1. I have a personal vision for my life
2. I can clearly articulate what Quality of Life means to me
3. I schedule regular time for health, fun, family, rest, and me
4. I spend time everyday learning through books, videos, audio, etc.
5. I seek out ways to learn more about personal and business development
6. I do something every month that scares me
7. I am actively learning out to improve my leadership skills
8. I get regular open feedback from others including my team
9. I am committed to regular exercise

TEAM GROWTH

1. We have a current organizational chart broken down by roles
2. We have an organizational chart for growth 2 years out
3. There is a strong leader on the team other than me
4. Our team knows the rules of the game for our business
5. Our team knows and embraces the vision, culture, and values of our business
6. There is a system for open communication with the team
7. All team members are committed to play "Above the Line"
8. We hold regular team meetings with agendas
9. We have regular team training
10. Each team member knows their role and how their results are measured (KPI)
11. There is a growth plan in place for every key employee
12. We have systems in place to give every team member the best chance to be successful
13. Everyone on the team has a 90-day plan
14. Each team member knows their positional description
15. We have a continuous hiring system to find the right people for the team
16. The business has a system for rewarding excellence

READY TO TACKLE YOUR FINANCIAL GOALS FOR THE NEW YEAR?

Visit [Carefreebook.com/contact/](https://carefreebook.com/contact/) to schedule a review call or scan the QR code here to open our appointment reservation form to get started today.



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