



# Keeping Your Business On-Track

## Business Review Checklist

---

A proactive business review has the potential to redirect your business toward solutions that align with short- and long-term goals. Use this handy checklist to perform a comprehensive business review and take note of what you learn along the way.

- 1. Evaluate your performance metrics and make adjustments where needed.

REMINDER: Assess financial performance, customer feedback, community involvement, and any other metrics that are connected to your mission statement.

NOTES:

- 2. Review your financials and identify any unnecessary expenses.

NOTES:

- 3. Evaluate internal communication and encourage discussion across departments.

NOTES:

- 4. Create and/or adjust your contingency plans for a market downturn.

NOTES:

- 5. Compile a list of solutions for current and future challenges.

NOTES:

- 6. Revisit your annual performance goals.

NOTES:

- 7. Review your systems for performance and efficiency.

REMINDER: Consider all systems that impact your business, including accounting, CRM, billing and Point-of-Sales.

NOTES:

- 8. Realistically assess competitive offerings.

NOTES:

- 9. Explore how you can better support your employees.

REMINDER: Ask employees to complete an anonymous survey to gauge their work satisfaction and encourage suggestions to increase morale.

NOTES:

- 10. Speak with your tax advisor.

REMINDER: Be sure to cover how revenue, expenses, and other changes now could positively affect your end-of-year tax filing.

NOTES: