

# Year-End Wrap Up & Planning

## CHECKLIST

Wrapping up the year includes cleaning up loose ends from the old year as well as planning for the new year. This check list will help you clean up, review and wrap up as well as create your plan for the next year.

### Clean Up

There are just certain things that need to be done on a routine basis and the end of the year is a great time to get these things done.

- Update records including bank accounts, credit card numbers and contact details
- Back up your data
- Back up contacts (on phone or on computer)
- Back up cloud based files
- Clean up files and folders (in email and wherever docs are stored)
- Clean up email
- Change passwords or set up Last Pass

### Run Your Numbers

What metrics do you want to measure? This might partly depend upon what your goals were for the year. Some examples might include:

- Sales
- Sales based on area (individual products, services, etc...)
- New subscribers (on social media, for newsletters)
- Social media metrics (What were your most popular posts? Was it usually video, image, text?)
- Expenses (Did you spend more on education? Did it pay off?)



*Don't get caught up in measuring metrics that aren't important to your goals. Focus on those things you made a point to improve or will be making a goal of for the new year and skip the rest.*





## List Your Projects

What major projects did you work on over the past year? Some examples of projects and/or content might include:

- Webinars
- Podcasts
- Videos
- Blog posts
- Teleseminars
- Newsletters
- Social media posts
- Affiliate programs (yours and others)

## Review Your Projects

As you begin to think about planning for next year, it will be helpful to have a good idea of how things went this year. Ask yourself the following questions for each item on your list:

- Can any of them be reused again?
- Do any of them need to be modified or improved first?
- Which ones need to be scrapped all together either because they just didn't work or because you didn't love doing them?

## Look To The Future

The end of the year is the perfect time to create plans for the new year. A few things to focus on include:

- Review or Write Mission Statement
- Review or Write Vision Statement
- Review Target Audience
- Review 5 year goals
- Write one year goals
- Write 90 day goals
- Decide what will NOT be your focus for the next 90 days
- Plan your one year projects and schedule on calendar
- Plan your short term projects and schedule on calendar
- Plan your content calendar
- Plan your social media calendar

*If you still need help with your year end wrap up, jump in our Facebook group - Coach's Copilot Hanger at [www.CoachsCopilot/hanger](http://www.CoachsCopilot/hanger). It's a great place to get some extra support and ideas!*