The Year-End Review That Set the Stage for a Stronger Next Year

A structured review creates clarity, accountability and momentum for the year ahead.

1 day	4 priorities	12
set aside for the review	chosen for the new year	monthly check-ins scheduled

Strategic Planning · Goal Setting · Financial Review · Leadership

The situation

A growing company had a good year, but leaders were always too busy to step back. Each January started without a plan, and the same problems carried over year after year.

The challenge

Without a year-end review, the company kept repeating the same pattern:

- **No look back** — results were never compared to the budget or to goals.
- **Unclear profitability** — leaders weren't sure which work made money.
- **Missed planning** — year-end decisions were made in a rush, without advice from their CPA.
- **No shared priorities** — each department set its own goals, or none at all.

A simple year-end review agenda

Step	Key question
Review the numbers	How did results compare to budget and to last year?
Celebrate wins	What went well, and who made it happen?
Name the problems	What should we stop, start or change?
Meet with your CPA	What year-end tax and financial decisions should we make before December 31?
Set priorities and a budget	What three to five things matter most next year?
Assign owners and dates	Who is accountable, and when will we check in?

What they did

- Blocked one full day in early December for a leadership review.
- Compared results to budget, last year and their goals.
- Met with their outside CPA on year-end planning before December 31.
- Chose four company priorities and built the new budget around them.
- Assigned an owner to each priority and scheduled monthly check-ins.

The outcome

The company started the new year with a clear plan, a budget tied to its priorities and a team that knew what mattered most. Monthly check-ins kept the plan alive, and leaders now treat the December review as a standing tradition.

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Self-check: could this happen to you?

- ☐ Do you review your results against your goals every year?
- ☐ Do you know your biggest wins and biggest problems from this year?
- ☐ Have you met with your CPA before year-end?
- ☐ Do you have three to five clear priorities for next year?
- ☐ Does each priority have an owner and a check-in date?

Want to talk through what this means for you?

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