

MID-YEAR SMALL BUSINESS CHECK-IN CHECKLIST



Refocus. Realign. Recharge for the rest of the year.

Use this quick checklist to assess your business’s health, refocus your goals, and finish the year strong. From finances to marketing, it’s a simple way to stay on track and plan your next steps.

1. Financial Health

- Review year-to-date profit & loss and cash flow statements
- Reconcile all bank, credit, and accounting records
- Assess operating costs—what’s up, what can be reduced?
- Review your pricing strategy and adjust if needed
- Check in on loan balances, grant usage, or new funding needs

2. Business Strategy & Goals

- Revisit 2025 goals—what’s complete, what needs adjusting?
- Identify top priorities for Q3 & Q4
- Explore new opportunities or potential pivot points
- Reconnect with your mission and long-term vision

3. Marketing & Customers

- Analyze marketing performance (ads, email, social, etc.)
- Refresh website content and update business listings
- Review customer feedback, reviews, or testimonials
- Re-engage with past customers or clients
- Plan for seasonal promotions or campaigns

4. Team & Operations

- Check in with staff or contractors—review goals & morale
- Identify any staffing or training needs
- Audit workflows, tools, and systems for efficiency
- Review vendor relationships and contracts

5. Compliance & Planning Ahead

- Ensure all licenses, permits, and insurance are up to date
- Review tax obligations and prepare for year-end filings
- Update your business continuity or emergency plan
- Schedule time for professional development or business coaching

COMMENTS

Final Step:
Celebrate your wins—big or small. You’ve made it halfway!

Staying on track takes focus, but you don’t have to do it alone.

We're here to support you.