Coaching Biz Growth Lab Year End Coaching Business Checklist

Use the following checklist to do a year-end stocktaking:

☐ Client files complete	☐ Year-end office purchases	NOTES
☐ Client Thank yous	☐ Program reviews	
☐ Update of client log (ICF)	☐ Website updates	
☐ CCEs listed and certificates available	☐ Next year program dates set	
☐ Major communications	☐ Vision written down	
saved/printed (newsletter/blogs/articles etc.)	☐ Review of this year's successes	
☐ Content Calendar - Next year	☐ Top 3-5 goals visible	
communications identified (newsletter/blogs/articles)	☐ Inbox ready to go (clear and organized!)	
☐ Marketing Material inventory (brochures, flyers)	☐ Professional learning goals identified and budgeted for	
☐ Marketing material update and/or order	☐ Team meetings set	
☐ Back-up of computer	☐ Thanks to partners	
☐ Filing of recordings for coaching	☐ Speaking engagements identified and/or scheduled	
☐ All invoices paid	☐ Aspirational goals and intentions set!	
☐ Accounts receivable complete	☐ One thing checked off the list	
☐ Accounts payable complete	from this year that kept getting carried forward!	
Invoice Listing for this year complete	☐ Project wrap up	
☐ Bank Statements printed/filed	☐ Year-end taxes paid	
☐ Receipts filed	□ Other	
☐ Car log complete	□ Other	
☐ Inventory of products	□ Other	