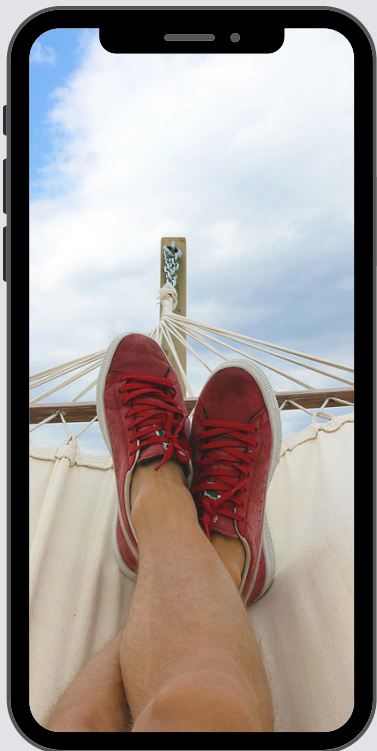# 2023
end of year tasks

In order to make the most of 2024

You need to be **ready** for 2024!

Here's a checklist of year-end tasks

So you're in a position to
make next year, your best year!

time
management

why?

You need time off so you come back after a holiday relaxed, recharged, and ready to make the most of the opportunities have.

Your business on the other hand needs to keep going while you're away. Batching ahead and using AI tools will help make sure that happens.

	Have	Must Have	Nice to Have
Use AI tools to save time (& improve outputs) on repeatable tasks	☐	☐	☐
Batch content to take you over the holiday period.	☐	☐	☐

2023
analysis

why?

Reviewing which marketing strategies worked this year, and which didn't, will help you build on your successes in 2024.

Review, measure and make recommendations ahead of your planning cycle.

	Have	Must Have	Nice to Have
2023 newsletter analysis	☐	☐	☐
2023 social media analysis	☐	☐	☐
2023 podcast analysis	☐	☐	☐
2023 blog analysis	☐	☐	☐

update
refresh

why?

Trends change. Make sure your branding and assets look current, professional, are user friendly, and reflect your business today **and** tomorrow. Not yesterday!

	Have	Must Have	Nice to Have
Brand guidelines	☐	☐	☐
Social media templates	☐	☐	☐
Document templates	☐	☐	☐
PDF forms	☐	☐	☐
Email signatures	☐	☐	☐

review
& reset

why?

Conducting thorough reviews at year's end provides invaluable insights into strengths, weaknesses and opportunities for improvement, ensuring your business remains competitive and efficient in this ever-evolving landscape.

	Have	Must Have	Nice to Have
Website review	☐	☐	☐
Tech Stack audit	☐	☐	☐
Team performance	☐	☐	☐
Risk assessment	☐	☐	☐
Systems & process review	☐	☐	☐

building
relationships

why?

It's the perfect time of year to listen. To thank those who work for you, who you work for.

Use feedback to improve your processes, have fun and show appreciation to improve your relationships.

	Have	Must Have	Nice to Have
Customer feedback surveys	☐	☐	☐
Organise client catchups	☐	☐	☐
Show appreciation	☐	☐	☐
Organising Christmas parties	☐	☐	☐

declutter
and breathe!

why?

Starting the new year with files you can find, a systemised inbox, and a tech stack you're leveraging will have you feeling lighter, in control and ready to take on the world!

	Have	Must Have	Nice to Have
Systemised, clean inbox	☐	☐	☐
Cloud-based filing structure	☐	☐	☐
A streamlined, leveraged tech stack	☐	☐	☐

that's a
wrap!

Do it yourself

If you're a do-it-yourself kinda person, transfer these tasks into your project management to-dos.

Accountability: In each to-do, note down the consequence of not completing this task.

Done for you

BOOK HERE

Our team have recommended these tasks. They're tasks we carry out both internally, and for clients we work with.

So we're experts!

Simply book a chat to delegate your 'must and nice to haves'. We'll make sure you're in the best possible place to make 2024 a year where you take advantage when opportunity comes knocking.