Pre-2026 Business Fix-It Plan

Don't just set goals. Fix what's broken before the year begins.

1. Year-End Audit Checklist

Check all that apply:

- [ ] 1. I'm still involved in daily admin tasks
- [ ] 2. My CRM isn't connected to my project/delivery system
- [ ] 3. We rely on me to keep track of status updates
- [ ] 4. Our team doesn't have clearly defined KPIs
- [ ] 5. We re-enter data in multiple tools
- [ ] 6. Our client experience depends on memory and effort, not systems
- [ ] 7. I don't feel confident stepping away for a week

If you checked 3 or more, start your Fix-It Plan now.

2. Your Business Foundation Fixes

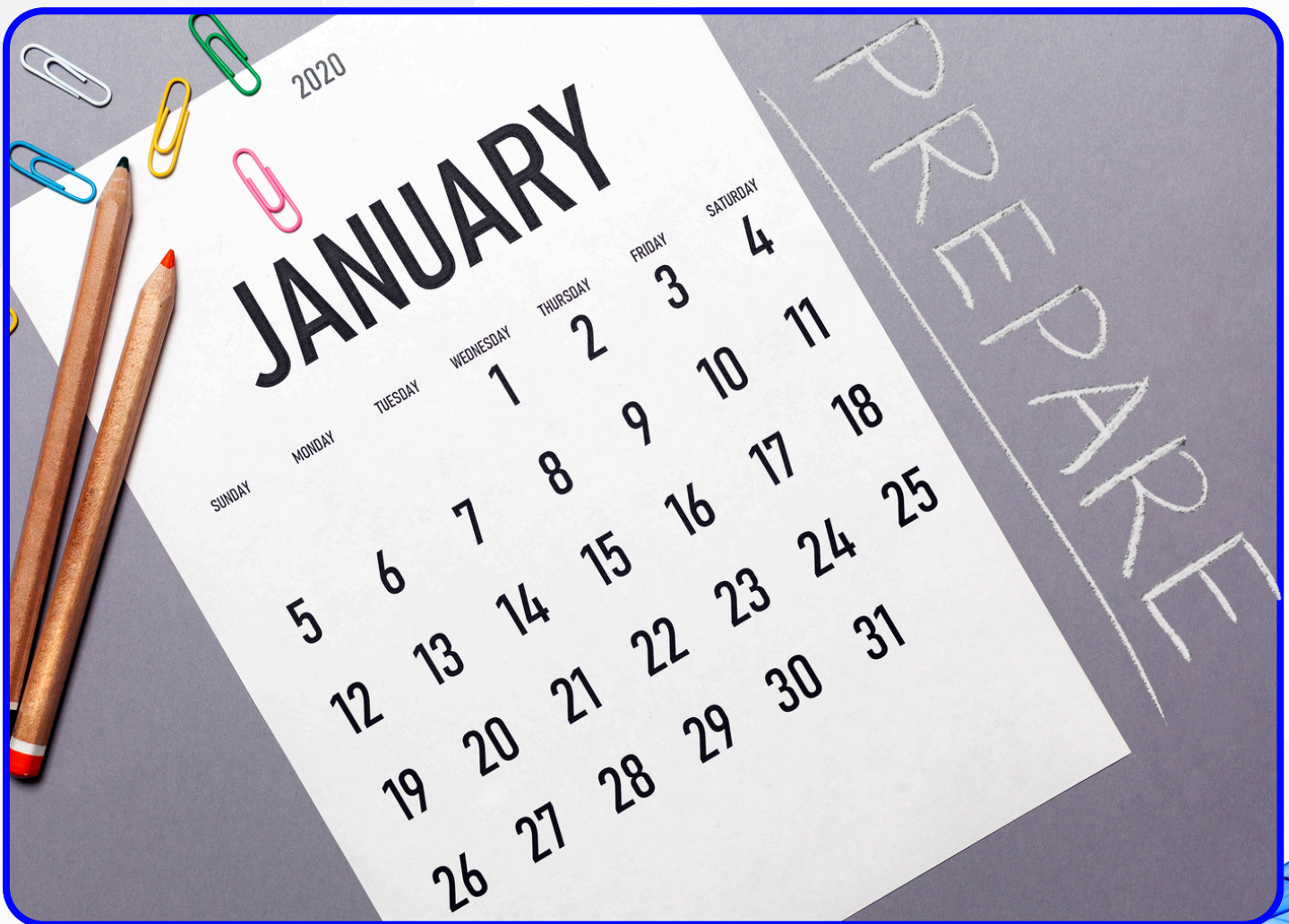| Area	Quick Fix Idea	Tool Suggestions
Time Management	Automate lead follow-up	Pipedrive + Gmail
Workflow Visibility	Set up dashboards for each role	DevStride, ClickUp, SuiteDash
Tech Overlap	Eliminate 1 unused or redundant app	Use Zapier to connect remaining tools
Team Ownership	Assign 1 "win" to each team member	Role-based KPIs
Your Role	Block 4 hours/week for strategy only	Calendar + accountability check-in

3. 30-Day Jumpstart Plan

Set these goals before January 1:

1. Fix your biggest time leak
2. Set up 1 new automation
3. Clean up your tech stack
4. Assign clear ownership to your top 5 tasks
5. Schedule 1 strategy session (with us or your leadership team)

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