



Year End Review
+ Aim for the New
Year!

2023

Your Success Metrics



Why Track Your Success Metrics?

- Gives clarity around where you're at to set goals of where you want to go
- Allows you to track progress and growth over time
- See patterns across seasons and years to help predict and strategize for the future
- Focus on what IS working in your business
- Adjust or cut out what is NOT working to focus energy on what moves the needle forward!
- Celebrate your wins!!

Possible Metrics to Track:

- Sales per revenue category (Gross sales monthly)
- Average Gross Sales & Profit per month
- Social Media insights
- Google/website analytics
- Client/customer list with detailed data segments
- Email open rate
- Services analysis (classes, bookings, events in detail)
- Event/promotion details
- Top Sellers
- Clients gained v. clients lost (retention/attrition)
- Others specific to your business?

Where to find these metrics?

- Your software system reports (POS/CRM)
- Quickbooks
- Social Media Insights
- Google Ads
- Google Analytics
- Email software reports
- Some are nowhere to be found, which is why you need to have your OWN dashboard!

Jeany Fend Review

Reflection on 2023...



Fill out the Dashboard from 2023 and then answer the following questions:

Where did most of my cashflow come from this past year?

What were the main channels of business? (Social media, website, Google, events referrals, etc.)

What events worked? What were they and what times of the year?

What promotions worked? What were they and what times of the year?

What products/services sold best? What didn't?

What was my best time of year for growth in clients, social media, sales?

What do I need to cut out or spend less time or money on in 2024?

Year End Review

Reflection on 2023...



What awesome and amazingly joyful things did 2023 bring for you?

What were some of the obstacles, challenges, and shadow times you went through in 2023?

Through the difficult times, what did you learn about yourself, who you are, and what is important to you?

Through the times of triumph and joy, what did you learn about yourself, who you are, and what is important to you?

Year End Review

Reflection on 2023...



In what ways did I grow in 2023?

What lessons did I learn?

What will I keep doing?

What will I stop doing?

What were my WINS this year?

What parts of my business did I not enjoy?

What parts of my business brought me the most joy?

Year End Review

Look Ahead to 2024...



**Fill out the Dashboard from 2023 and then answer the following questions:
What do I need to add more of and put more energy into in 2024?**

In what areas do I want to grow in 2024?

What systems and strategies do I need to implement to get there?

Where do I see myself at the end of this year?

What would SUCCESS in my business and life look and feel like?

Year End Review

Look Ahead to 2024...



Core Desired Feelings

CIRCLE YOUR CORE DESIRED FEELINGS FOR 2024

- | | | | |
|-------------------|------------------|------------------|------------------|
| 1. Attentive | 26. Certain | 51. Orgasmic | 76. Intense |
| 2. Safe | 27. Adequate | 52. Breathtaking | 77. Bright |
| 3. Sacred | 28. Energized | 53. Union | 78. Emphatic |
| 4. Connected | 29. High-Flying | 54. Heroic | 79. Elation |
| 5. Potent | 30. Playful | 55. Spirited | 80. Significant |
| 6. Full | 31. Unfiltered | 56. Fair | 81. Important |
| 7. Fertile | 32. Talented | 57. Worthy | 82. Rewarded |
| 8. Co-Creative | 33. Woven | 58. Liberated | 83. Substantial |
| 9. Impactful | 34. Intentional | 59. Unleashed | 84. Favored |
| 10. Transparent | 35. Aesthetic | 60. Wide-Eyed | 85. Studious |
| 11. Inspirational | 36. Sun-Lit | 61. Dynamic | 86. Innovative |
| 12. In-Tune | 37. Spacious | 62. Irresistible | 87. Cultured |
| 13. Present | 38. Free-Flowing | 63. Beaming | 88. Daring |
| 14. Resonant | 39. Reborn | 64. Genuine | 89. Lucky |
| 15. Relaxed | 40. Willing | 65. Compatible | 90. Supercharged |
| 16. Centered | 41. Instinctive | 66. Tranquil | 91. Dependable |
| 17. Curious | 42. Dedicated | 67. Purity | 92. Ecstatic |
| 18. Keen | 43. Self-Assured | 68. Sensible | 93. Lush |
| 19. Wise | 44. Vibrational | 69. Immersion | 94. Luxurious |
| 20. Sensitive | 45. Alchemic | 70. Wonder | 95. Plenty |
| 21. Sensuous | 46. Trustworthy | 71. Stillness | 96. Bliss |
| 22. Tender | 47. Thorough | 72. Serenity | 97. Supernatural |
| 23. Honest | 48. Diligent | 73. Depth | 98. Precious |
| 24. Appreciated | 49. Enthusiastic | 74. Strength | 99. Winged |
| 25. Mindful | 50. Seasoned | 75. Focus | 100. Mended |
| | | | 101. Devout |

Year End Review

Look Ahead to 2024...



Desires for 2024...

Circle all on the list that you align with or write your own. Now narrow it down to 3-5 Core Desired Feelings for 2024:

What is your ONE word or Desired Feeling to cultivate & continue to connect back to in 2024?

What do you want to create in your life for 2024 that allows you to feel your core desired feelings?

What is your one BIG intention to focus on that will bring more opportunities to connect you to your core desired feelings and create the life you desire?

Year End Review

Look to the Future...



Where do you see your business...

This Year, 2024?

In 3-5 years?

Year End Review

Define Your Success!



What does SUCCESS look and feel like to you in business and life in 2024?

What success metrics are you currently tracking in your business?

What metrics do you need to start tracking in your business for 2024?

How often and when will you track & analyze them throughout the year?

Why are these important to you?

What goals do you need to set for 2024 based around your business success metrics?

Year End Review

Big 3 for 2024

Fill out the annual, quarterly, monthly goals starting with January, then start to break them down into weekly and daily action steps.

My Big 3 Annual Goals:

1.

2.

3.

My Big 3 Quarter 1 Goals:

1.

2.

3.