NEXLEVEL
Strategic Partners, LLC

Mid-Year Check-In: Is Your Business on Track *Use this checklist to check progress and adjust your path if needed. If you have any questions, feel free to reach out to email me at karen@nexlevelstrategicpartners.com*

Mid-Year Checklist

- ☐ *Review Your Annual Goals and KPIs*
  - *Are you on track with your original objectives? What needs to change?*
- ☐ *Evaluate Completed and Pending Projects*
  - *What have you accomplished? What is delayed or off track?*
- ☐ *Check Your Financial Status*
  - *Compare your actual spending/revenue vs. your budget. Are you where you expected?*
- ☐ *Reassess Team Capacity and Resources*
  - *Do you have the right people and tools in place for the second half of the year?*
- ☐ *Update Marketing and Outreach Strategies*
  - *What's working? What's not? Do you need to refine your messaging or platforms?*
- ☐ *Identify New Opportunities or Threats*
  - *Consider market changes, competitors, or new funding/sales opportunities.*
  - *Do you have an updated SWAT Analysis?*
- ☐ *Reconnect with Clients, Funders, or Partners*
  - *Reach out with updates or check-ins to strengthen relationships.*
- ☐ *Plan Adjustments for Q3 & Q4*
  - *Set revised targets and timelines based on your review.*
- ☐ *Assign Responsibilities & Accountability*
  - *Clarify who owns what for each next step moving forward.*