



New Year Transition Checklist

EVALUATE

- ☐ **Reflect on your performance.**
What went well? What could've gone better? Why didn't it go as expected? What lessons did you learn? What will you do differently?
- ☐ **Reflect on your hospital's performance.**
What went well? What could've gone better? Why didn't it go as expected? What lessons did you learn? What will you do differently?
- ☐ **Review your goals and set new ones.**
Take a look at your latest goals and reflect on your hurdles and victories. Create a new SMART goal sheet for your biggest priority in the new year and loop someone in for extra accountability.

ELEVATE

- ☐ **Complete an inventory hard count and review your fees.**
Update numbers in your system and make sure to report value of product to your CPA on the last open day of the year. Evaluate vendor price increases and adjust your service fees.
- ☐ **Run a 2023 YE P&L.**
Review gross revenue, net income, payroll, cost of professional services, and rent. Examine your primary revenue centers and develop KPI goals for the new year.
- ☐ **Start working on a 2024 hospital budget.**
Review your budget and update it for the new year. Factor in big purchase items, such as equipment purchases, the introduction of new services, staff development, and client education.
- ☐ **Reconcile accounts, review business agreements, and update employee information.**
Reconcile all bank, credit card, & petty cash accounts. Review insurance plans and credit card processing fees, as well as payroll & benefits reports. Update employee information.
- ☐ **Create opportunities for your team to review performance and goals.**
Have an open discussion with each team member about their strengths, areas for improvement, as well as their personal and professional goals for the new year.
- ☐ **Schedule an on-site 2024 Strategic Planning session with Blue Heron Consulting.**
Kick the year off right with a Blue Heron Consulting coach-led Strategic Planning retreat! Make 2024 your best year yet by redefining your strategic vision, outlining a plan of action, and reenergizing your team to pursue those goals full steam ahead.

Don't forget to celebrate, too! While it's important to look for improvements going into the new year, it's just as important to look back on the accomplishments of your team, your hospital, and yourself! Set aside time for a holiday party or end-of-year celebration with your team!