YOUR APEX CHECK-IN



YOUR QUARTERLY BUSINESS REVIEW & PLANNING GUIDE

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Your Business Deserves a Check-In

The Apex Check-In helps you review your progress, identify what needs attention and set priorities for the next quarter.

How to Use This Guide

Set aside time to focus on your business and work through this guide at your own pace.

- ✔ Review the quarterly overview to understand each quarter’s focus
- ✔ Use the 6-Point Apex Check-In Framework to review the year and prepare for the next.
- ✔ Consider the Key Activities and answer each Apex Reflection honestly.
- ✔ Complete the Put It in Motion prompts to turn your reflections into action.
- ✔ Record your priorities in Your Apex Action Plan. Assign a responsible party and set targeted dates.

Return to your action plan regularly to review progress, adjust priorities, and prepare for your next Apex Check-In.

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Why Your Apex Check-In Matters

Daily responsibilities can make it easy to lose sight of your business goals. A quarterly check-in gives you time to review your results and decide what needs to change.

Use each check-in to:

- ✔ Compare your progress with your goals.
- ✔ Recognize what's working and address what isn't.
- ✔ Review how you're spending your time and money.
- ✔ Set clear priorities for the next quarter.

At Apex Business Pro, we believe structure supports better decisions. A regular check-in helps you plan with a clearer understanding of your business.

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Q1: The Quarter of Momentum

Strategic Focus:

Turn your annual goals into clear priorities and begin putting your plan into action

Key Activities:

- ✔ Set your annual goals and choose your top priorities for the quarter.
- ✔ Set revenue and profit targets.
- ✔ Launch marketing activities that support your goals.
- ✔ Decide how you will measure progress.



Apex Reflection

What early result would show that your business is moving in the right direction?

Put It in Motion

Choose one priority. Write down your first action and set a target date.

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Q2: The Quarter of Execution & Refinement

Strategic Focus:

Build on your first-quarter results. Improve how the work gets done and adjust where progress has fallen short.

Key Activities:

- ✔ Compare Q1 results with your goals.
- ✔ Continue the activities that produce worthwhile results.
- ✔ Address delays and simplify inefficient processes.
- ✔ Review expenses and cash flow.
- ✔ Adjust your priorities based on what you've learned.



Apex Reflection

Which process slowed your progress in Q1, and what would make it work better?

Put It in Motion

Choose one process to improve. Write down the change you'll make and set a target date.

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Q3: The Quarter of Acceleration

Strategic Focus:

Use your mid-year results to adjust your approach, pursue growth opportunities, and prepare for the final quarter.

Key Activities:

- ✔ Review your first-half results against your annual goals.
- ✔ Adjust strategies that are falling short.
- ✔ Focus on opportunities to increase revenue and attract clients.
- ✔ Forecast Q4 needs and plan your resources.



Apex Reflection

Where could a change in direction or a focused investment help your business make progress before Q4?

Put It in Motion

Choose one growth opportunity. Identify the resources you'll need, set a target date, and decide how you'll measure the result.

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Q4: The Quarter of Profit & Planning

Strategic Focus:

Review your year-to-date performance, complete outstanding priorities, and prepare your business for the coming year.

Key Activities:

- ✔ Review revenue, expenses, and profit against your annual goals.
- ✔ Identify projects and commitments to complete before year-end.
- ✔ Organize financial records and address missing information.
- ✔ Draft next year's goals and first-quarter priorities.



Apex Reflection

What needs your attention to finish the year strong and prepare for the year ahead?

Put It in Motion

Choose one year-end priority. Write down your next action and set a completion date.



Use the six-point Apex Check-In Framework on the following pages to review your year and plan your next steps.

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The 6-Point Apex Check-In Framework

Each step includes a **Pause & Reflect** question to help you evaluate your business and a **Put It in Motion** activity to turn your observations into action.

The 6-Point Apex Check-In Framework guides your year-end review and helps you prepare for the coming year.

Work through these six areas:

1. Review Your Year-to-Date Performance
2. Close Out Open Projects
3. Prepare Your Year-End Financials
4. Evaluate Your Systems & Operations
5. Plan for the Coming Year
6. Team, Partnerships & Mindset

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1 Review Your Year-to-Date Performance

Review Your Year-to-Date Performance

Review your results before setting new goals. Identify what worked, what fell short, and what needs to change.



Apex Reflection

What do your results reveal about where to focus your time and resources?

Key Activities:

- ✓ Compare actual revenue and profit with your targets.
- ✓ Identify which projects or clients delivered the greatest return on your time and money.
- ✓ Evaluate which strategies worked and which need adjustment.
- ✓ Compare quarterly results to identify trends.

Put It in Motion

Gather your year-to-date financial reports. Record your strongest result, your biggest gap, and one change to include in your next plan.

2 Close Out Open Projects

Unfinished projects can tie up your time, money, and attention. Identify what needs to be completed before year-end and give each item a clear next step.

Key Activities:

- ✔ List unfinished projects, tasks, and client commitments.
- ✔ Review outstanding contracts and unpaid invoices.
- ✔ Identify what is preventing completion.
- ✔ Assign responsibility and realistic completion dates.



Apex Reflection

Which unfinished item is creating the greatest strain on your business?

Put It in Motion

Create your Year-End Completion List. For each item, record the next action, the person responsible, and a target date.

3 Prepare Your Year-End Financials

Organize your financial records before year-end so you have time to resolve missing information and prepare for a productive conversation with your accountant or bookkeeper.

Key Activities:

- ✔ Reconcile business bank and credit card accounts.
- ✔ Organize receipts and resolve missing transactions.
- ✔ Review profit margins and expenses.
- ✔ Meet with your accountant or bookkeeper.
- ✔ Discuss planned purchase and potential deductions with your tax professional.



Apex Reflection

What financial information do you need to better understand your business's position?

Put It in Motion

Create a list of missing records and questions for your financial professional. Set a date to gather the documents and schedule your review.

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4 Evaluate Your Systems & Operations

Review how your business runs each day. Identify outdated materials, repeated tasks, and inefficient processes that need attention before the coming year.

Apex Reflection



Which small change in your daily operations could save you the most time?

Key Activities:

- ✓ Evaluate whether your tools and workflows meet your business needs.
- ✓ Identify tasks you could automate or delegate.
- ✓ Review contracts, templates, and onboarding materials for needed updates.
- ✓ Look for delays, duplicated work, and unclear processes.

Put It in Motion

Choose one operational improvement to complete before the new year. Outline the change, assign responsibility, and set a target date.

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5 Set the Stage for the New Year

Begin planning before January so you can enter the new year with clear priorities and direction.

Key Activities:

- ✔ Set quarterly revenue goals for the coming year. business needs.
- ✔ Draft your Q1 marketing and content calendar.
- ✔ Review staffing needs and available support.
- ✔ Align your systems and budget with your growth targets.



Apex Reflection

What needs to be in place for your business to start the new year prepared?

Put It in Motion

Choose your top priority for Q1. Identify the preparation needed, your first action, and a target date.

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6 Team, Partnerships & Mindset

Reflect on the people who supported your progress and the lessons that shaped how you lead.



Apex Reflection

What did you learn about your leadership, and what kind of business owner do you want to be next year?

Key Activities:

- ✓ Recognize team members and partners who contributed to your success.
- ✓ Review which working relationships supported your business goals.
- ✓ Identify where you need additional support or development.
- ✓ Consider habits and perspectives you want to carry into the new year.

Put It in Motion

Thank someone who supported your business this year. Choose one leadership habit or relationship you will strengthen in the coming year.

Your Apex Action Plan

Bring your insights together. Review what went well, what needs attention, and the next steps and priorities for your business.

Category	Priority	Action Needed	Responsible Party	Target Date
Ex. Operations	*1*	*Review client onboarding workflow*	*HR*	*Dec 15*

Put It in Motion

Schedule time to begin your first action and set a date to review your progress.

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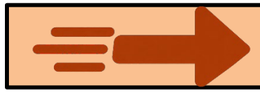
Lead with Intention

You've completed Your Apex Check-In. You've reflected on your business and identified where to focus next.

Keep you action plan accessible, set aside time for your priorities, and review your progress regularly.

Before You Go

- ✔ Schedule you next Apex Check-In.
- ✔ Set aside time to begin your first action.
- ✔ Recognize the progress you've made.



Clarity gives you direction. Consistent action moves your business forward.

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