



Annual Review

An annual review is a good way to take stock of what was achieved in the previous year, and where your business is headed in the next 12 months. These questions are designed to highlight areas that are commonly overlooked or overtaken by the day to day running of a business. They will give you a snapshot of where your energy will be required over the coming year.

First, some basics about your structure and public profile:

- Business structure selected
 - Sole Trader
 - Partnership → Partnership Agreement in place
 - Company
 - Other _____
- Commenced trading ___/___/___
- Website URL _____
- Business Facebook Page URL _____
- Other social platforms (business) _____
- Blog URL _____

Where else can your target audience interact or learn about you? _____

Describe your business

Number of employees? _____

Number of regular contractors? _____

What main goals did you set last year, and did you achieve them?

_____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	Yes <input type="checkbox"/> No <input type="checkbox"/>

Do you require licenses, and if so, are they up to date? Yes No Not Sure

Does your website contain your Terms of Use & Privacy Statement? Yes No Not Sure

Do you have sufficient insurance? (eg. Personal, PII, public liability, key employee, building & contents, product liability, vehicle insurance) Yes No Not Sure

Do you have written policies for key areas of operation? Yes No Some

Are your policies up to date? Yes No Not Sure

Do your standard contracts comply with unfair contract laws introduced in 2016? Yes No Not Sure

Do you know who owns your Intellectual Property? (eg. Business & product names, website, designs, methodology, logos, website images, blog content, policies, artwork) Yes No Not Sure

Are they each protected by Trade Mark or Design registration as appropriate? Yes No Not Sure

Does your marketing comply with consumer laws and anti-spam laws? Yes No Not Sure

If you use contractors, are you sure they could not be classed as employees? Yes No Not Sure

In general terms, what would you like your business to achieve in the year ahead?

What significant changes are planned for the next 12 months?

What industry events or significant dates are already scheduled for the next 12 months?

What are 10 things on your business 'To Do' list for the next 12 months?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Which 3 do you consider to be the most important?

1. _____
2. _____
3. _____

What personal strengths/skills will you rely on more heavily in the year ahead?

What areas of your skill set will need support?

Do you have key professionals in place to assist you over the next 12mths?

- Solicitor _____
- Accountant _____
- Bookkeeper _____
- Business Coach / Mentor _____
- Other _____

What Now?

Sometimes, it's helpful to get a few things down in writing, and that might be all you needed to do. But if you'd like a lawyer to take you through **your legal options & obligations**, help you **prioritise** them and provide you with plenty of **DIY links** for your next 12mths, complete and return this self-assessment by email and we'll contact you to book a **60min Legal Coaching Strategy Session**.

We know that time & money are both limited in the world of small business, so we take a very focused approach to the time we spend with you. This assessment helps us **tailor our discussions** so we only talk about the things that are relevant to you.