



THRIVING *Women* IN BUSINESS

with Caterina Rando

Expand Your Fempire Mid-Year Check-in & Check-up Checklist

***This checklist corresponds with the Expand Your Fempire podcast episode #50, "A Mid-Year Check-in and Check-up for Your Business." Listen to the episode here:**

<https://caterinarando.com/podcasts/episode-50-a-mid-year-checkup/>

It's time for you to review and reflect on what has happened the first six months of the year and determine what you want to upgrade, adjust, eliminate, and improve for the second half. We want the second half to be your best half of the year.

Use this "Expand Your Fempire mid-year check-in and check-up checklist" so that you can bliss more in your business, love your life more, and of course, keep uplifting lives with your business.

Values

- Review the list of values by which you want to run your business. *Is there any value to add?*
- Are you operating your business with kindness, integrity, generosity, love, and genuine service?*
- Ask yourself, are these values reflected in the way you behave each day?*
- Are these values reflected in the way your team is behaving?*
- Are your values clearly apparent in the way you and your team interact with your clients?*
- Take a look. Is there anywhere in your business that you feel out of integrity?*

Efficiency

This mid-year review is a great time to look at the efficiency of your business.

- Is your sales process efficient, meaning is follow-up happening consistently?*
- Is your client care efficient and outstanding? How can you upgrade it?*
- Do you have systems and checklists everywhere needed? Is it time to review these?*
- Is your software and the other technology solutions you are using still meeting your needs?*
- Are you doing a good job of using your calendar? Is there any place to improve?*
- Do you have times that you do the same thing every month or every quarter?*



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☐ Sales

- ☐ Review your revenue, your sales systems, and your sales support. *Where can you upgrade?*
- ☐ Set or adjust your goals for the rest of the year. Create or adjust your plan to reach them.
- ☐ Review that plan every single day and modify as needed.
- ☐ Evaluate if you have enough time for sales and add time if needed.
- ☐ Keep consistent with your sales activities to gain sales and to also get more masterful at selling.
- ☐ *Is it time to add some sales support?*
- ☐ *Have you blocked out time for your workshops and your sales for the rest of the year?*

☐ Operations

☐ Client Care:

- ☐ *Are you effectively delivering your products or services consistently?*
- ☐ *Is there anything that's bothering you that you're tolerating?*
- ☐ *Is there anything that you need to eliminate or delegate to be more efficient?*
- ☐ *Do you have an effective on-boarding client checklist?*
- ☐ Evaluate how your referral program is going. *Are you getting referrals regularly?*

☐ Facilities Management: review anything that relates to the location of your business, whether it's brick and mortar, or in your home.

- ☐ *Is there anything you're tolerating?*
- ☐ *Anything that is broken or needs repair?*
- ☐ *Is there anything that you need to get rid of?*

☐ Team Management:

- ☐ *Do you meet regularly with key members?*
- ☐ *Do you have a code of conduct and a confidentiality agreement?*
- ☐ *Do you have an effective on-boarding client checklist?*
- ☐ *Do you meet twice a year to do a review with your team members?*



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☐ Finance

- ☐ **Review all of the things that you're paying for on a monthly basis**, that you may or may not be using.
- ☐ Then ask *are fees growing?*
- ☐ *Are there any charges you do not recognize?*
- ☐ *Anything you are paying for that you do not feel is worth your investment?*
- ☐ *Anything you can cancel or renegotiate?*

- ☐ *Are you setting aside money each month for taxes?* Ideally putting it in a separate account.
- ☐ *Are you paying yourself monthly by automatic withdrawal from your business account to your personal account?*

- ☐ **Do an inventory of all the technology you're using.** *Are you using the processes and the checklists you put in place at the beginning of the year? Where could you use a new decision to serve your clients even better for the second half of the year?*

- ☐ **Do a bookkeeper review:**
- ☐ *Is your bookkeeper someone you trust?*
- ☐ *Do they communicate well with you?*
- ☐ *Do you meet regularly, ie: monthly, and at the end of every quarter?*

- ☐ **If you don't have a personal relationship with your banker, develop one or get a new bank.**
- ☐ *Look at community banks and credit unions - both are friendly towards small business.*
- ☐ *Do you have a line of credit to give you a safety net?*

☐ The Client Experience

- ☐ *How are you doing at your client communication? Where can you upgrade?*
- ☐ *Are your clients engaged? Are there opportunities to improve your client engagement?*
- ☐ *Are you and your team responding quickly to client questions and requests?*



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☐ Queen of Your Fempire (CEO Stuff)

- ☐ Ask yourself this important question, *how do you want to **be** different?*
- ☐ Reflect on: *where is your time going?* Remember that you have five things to focus on:

♥ Speaking ♥ Selling ♥ Serving ♥ Strategy ♥ Self-care

- ☐ *Which one of these do you want to focus on more the rest of the year?*
- ☐ *Where can you use more support personally and in your business?*
- ☐ *Where are you not blissing in your business?*
- ☐ *What steps can you take to increase your business bliss?*

Take some time to reflect on each of these areas. Then put together an action plan that you can implement before the end of the year to upgrade each area so that you can grow, thrive, and bliss more in your business!

Gain massive value from our Thriving Women in Business Community! We provide amazing programs, support, networking, and even retreats for women on a mission.

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About Caterina Rando, MA, MCC



Caterina Rando is on a mission to mentor women in business on a mission to embrace speaking, sell effectively and scale their businesses. She shows women entrepreneurs how to be loud and proud about the value they bring in order to make their businesses thrive. Her clients grow, shine, expand, open themselves up to new possibilities and take their businesses further than ever before. **Caterina is all about, positivity, integrity, generosity, community, and providing massive value while uplifting others.** She is a sought-after-speaker, retreat facilitator and author. Her latest book is the *ABCs of Public Speaking*. Her book, *Learn to Think Differently*, from

Watkins Publishing is published in over thirteen countries and several languages.

Caterina is the founder of the Thriving Women in Business Community, made up of all the women in her advanced programs and some program graduates. Caterina and her team conduct a variety of programs designed to provide skills, support and an environment for breakthroughs for women to succeed who want to catapult their businesses to the next level.

Today there are a myriad of coaches, mentors, speakers, and trainers to choose from. Caterina is the right choice if you are a woman entrepreneur looking for someone that is both highly experienced and innovative, practical, and powerful, inspiring and action oriented. Caterina will provide you with the guidance, strategies and support you need to make your business thrive.