


Audit & Assess

September is your “look back” month. Review your financials, reconcile accounts, and check progress against annual goals. Audit contracts, subscriptions, and inventory so you know what’s costing you money or taking up space. This gives you a clear baseline before you start planning.

-  How this works: **You already filled the “Criteria” column** with your tasks.
- Just go through each, add a **rating (1–5)**, notes, and mark any **action required**.
- Assign an **Owner** (who’s responsible) and a **Due Date** to make sure nothing slips.

Category	Criteria	Rating	Action/Notes	Owner	Due Date
Finance	Review YTD financials				
Finance	Schedule meeting with accountant to estimate taxes				
Operations	Check contracts, subscriptions, and software—cancel /renegotiate				
Strategy	Evaluate progress toward annual goals (ahead /behind?)				
Inventory	Start inventory check—plan clearance sales for slow movers				