**Do-it-yourself business review – agenda for [insert company name]**

Use this agenda template to prepare for a do-it-yourself review of your business performance and direction. Adapt the table depending on your needs. For example, add rows in the relevant sections for the topics you need to cover, or delete any sections you don’t need. We’ve added some questions to prompt your thinking, but you can adapt these depending on what you most want to focus on.

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| **Who, when, where** |
| **Date:**  **Start time:**  **End time:**  **Location:**  **Who’ll be there:** |

| **Topic to review** | **Time**  **(mins)** | **Key points and actions** |
| --- | --- | --- |
| Follow up from the previous review  (eg, discuss action items) |  |  |
| **Your market performance and direction** | | |
| * How well is your business performing overall? * What’s behind any particularly good or bad results? * What can you do to repeat success, or to combat problems? * Which markets could you aim for next? |  |  |
| **Your products and services** | | |
| * How well do your products and services meet customer needs? * How do your products or services compare with your competitors’ — both locally and overseas? * Do you need to improve or replace any of your products or services? * Are you well placed to keep your position in the market? |  |  |
| **Your operations and efficiency** | | |
| * Are any internal issues holding your business back? * How efficient are your processes? Could you simplify them to improve your output? * Are you using the right technologies? * Are you reaching the quality you’re aiming for? * Are your premises still a good fit for your business? |  |  |
| **Your finances** | | |
| * Are you happy with your current finances? * How do current finances compare to any budgets or plans you’ve set? * Do you need to change anything to avoid future cash flow problems? * Do you need to look for investment? |  |  |
| **Your people** | | |
| * Are all the roles in your business well defined? * Do you have any problems attracting or keeping staff? * Has your staffing kept up with growth or other changes in your business? * Are you developing your staff as well as you’d like? * Do any particular staff members need any special attention? * Are you planning well ahead for any hiring, so you aren’t doing it under pressure? |  |  |
| **Summary of this do-it-yourself governance review** | | |
| Who needs to do what before the next review |  |  |

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| **Notes** |
| **Use this section for any important notes or action points that fall outside the main topics of your meeting.** |
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