End-of-Year Planning: Staffing, Strategy, and Setting Yourself Up for Success

We've officially entered the last quarter of the year—the season when business leaders pull out their scorecards, measure progress against goals, and make adjustments before the clock runs out. If you're not hitting your sales quota yet, now's the time to double down. Remember: it's likely that no one works the last two weeks of the year.

But sales aren't the only area that needs attention in Q4. The most successful business owners use this time to think ahead—not just about revenue goals, but also about the people and structure needed to sustain growth. You don't need a personal assistant to do this kind of planning; you just need a little intentional time and a sharp pencil.

Here are the key questions you should be asking yourself as you close out the year:

1. What staffing changes are on the horizon?

Take stock of your team. Are there anticipated departures, retirements, or promotions coming up? Do you need to plan for a new hire—or perhaps pause hiring until revenues stabilize? Look at your current year's revenues and expenses and align your staffing plan accordingly.

2. Are there skill gaps holding us back?

This is the perfect time to identify whether your business has the right skill sets in place for next year's strategy. Do you need stronger digital marketing expertise? A more experienced controller? More customer service capacity? Sometimes the right move isn't a new hire but providing training to the great employees you already have.

3. Are we compensating competitively?

The labor market is constantly shifting, and retaining key talent often requires adjustments. Run a compensation review to see if your pay structure is aligned with industry benchmarks. A small raise today may prevent a costly turnover tomorrow.

4. If we hit our growth goals, who do we need next?

Let’s say you hit your revenue target for next year—what additional staff would you need to keep pace? Planning for this now ensures you’re not scrambling midyear. Think of it as mapping your future org chart based on your financial forecast.

End-of-year planning isn’t just about wrapping up the current year—it’s about positioning yourself for success in the next. Take a few hours this quarter to evaluate staffing, training, and compensation in light of your financial goals. By doing so, you’ll start the new year ahead of the curve, with clarity about what’s next.

Because when January comes, you don’t want to be reacting—you want to be executing.