



# Small Business Monthly Check-In

A simple monthly reset to see what's working, what's not, and what deserves your attention next.

Month:

Year:

Business:

## 1. QUICK NUMBERS

Revenue

Expenses

Profit / Loss

New customers

New leads

Biggest expense

## 2. WHAT WENT WELL?

What worked, improved, sold, converted, saved time, or made you proud this month?

## 3. WHAT DIDN'T GO WELL?

Where did you lose time, money, momentum, customers, or energy?



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## 4. WHAT BROUGHT IN BUSINESS?

What actually brought you leads, customers, sales, referrals, or repeat business?

## 5. WHAT WASTED TIME OR MONEY?

What should you stop, reduce, replace, renegotiate, or rethink?

## 6. WHAT NEEDS ATTENTION NEXT MONTH?

List the areas that need attention before they become bigger problems.

## 7. TOP 3 PRIORITIES FOR NEXT MONTH

1.
2.
3.



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## 8. ONE THING TO KEEP DOING

## 9. ONE THING TO STOP OR CHANGE

## 10. ONE NUMBER TO WATCH NEXT MONTH

Choose one metric that matters most right now: revenue, leads, conversion, expenses, repeat customers, etc.

Metric

Target

## 11. MONTHLY TAKEAWAY

In one or two sentences, what did this month teach you about your business?

### HatchStride Tip

Do this once a month. The goal is not to track everything. The goal is to notice what deserves your attention.