



# Year-End Checklist

## For HR Leaders

We realize year-end is a busy time for HR leaders, so we've created a checklist to help you analyze, organize, plan, and celebrate, and team's goals, opportunities, and success.

### Analyze

- Review past year's goals, budgets, retention/turnover rates, training and development programs, vendor contracts, etc.
- Examine policies and procedures, hiring/onboarding/offboarding processes, benefits packages, training programs, employee survey results, and other areas to identify what is working well and opportunities for improvement.

### Organize

- Create new year calendars: company-observed holidays, performance reviews, license/certification renewals, compliance training, benefits election, special events, HR initiatives and projects, etc.
- Update job descriptions, succession plans, policies and procedures, employee handbook, etc.
- Clean up, purge, and store HR files
- Research new state and federal labor law updates
- Ensure employee data is up-to-date and prepare for tax filings
- Distribute annual notices

If you need support with clean-up, expansion and/or optimizations for your zone, using up this year's budget for other projects, or planning your new year projects and resources, our experienced team is happy to help.

### Plan

- Align and develop short and long-term goals and strategy for new year
- Review HR trends and new technologies to support strategy. Consider new tools that support: holistic health benefits, easier ways to track employee illness and compliance, better ways to measure and improve diversity, seamless texting solutions for faster hiring, flexible workspaces, employer branding, AI, HR chatbots, and virtual team building to name a few.
- Assess staffing needs and plan for new hires
- Evaluate budgets and allocate resources
- Finalize and communicate annual goals

### Celebrate

- Schedule team meeting to celebrate wins
- Share performance highlights and recognize team members
- Show gratitude to your employees, i.e.: small gifts or celebrations and/or internal communication/recognition

**Need Support?**  
We're happy to help.

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