

Annual Review and Planning

Preparing for your review

- Get comfortable: You might want to go somewhere you don't associate with work.
- Protect your space: Make sure you won't be disturbed. This is your time!
- Transition to mindfulness: Take 5-10 minutes of quiet time. Meditate, doodle, or just stare straight ahead – whatever it takes to put a “buffer” between you and your everyday stuff.
- Make notes: Have something to write in/on/with.

Looking Back

1. What have I accomplished in the last year?
2. Where am I today compared with where I was a year ago?
3. Am I happy with where I'm at? What would I like to change?
4. How well am I keeping up with all my duties and obligations?
5. Is everything I'm doing contributing to my advancement towards my goals? What can I do about the stuff that isn't?
6. What went right over the past year? How can I make sure more of that happens?
7. What went sideways over the past quarter? What lessons can I learn from that?

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Looking Ahead

1. What are my goals for the next month? Quarter? Year?
2. Who do I want to be?
3. Where would I like to be in three months? In a year?
4. What would I like to say I have accomplished three months from now? A year from now?
5. Given where I would like to be in three months, how will I get there?
What steps / actions will I take?
6. What kind of help do I need?
7. What is coming up that I need to be prepared for?
8. What new projects would I like to get started in the next quarter?
9. How do I want to present myself to the world in the coming quarter?
What energy, attitudes and behaviors do I want to project?