

Annual Review Session

Understanding that most people (over 80% in fact) fail in realizing their New Year's Resolutions, I've spent the last four years developing and honing a process that is designed to help you achieve more of your Resolutions. Over the past four years, I've noticed that I not only **achieve more of my goals**, but that **my goals are also getting bigger** each year, as I use this process.

95% of the people who read this won't do it. It's not designed for the masses. It's for the people that truly want to make a difference in their lives this year. You'll need to decide if that's you, or not.

So here's the overview:

- A. Allow as much time as possible. Ideally a full day, minimum 2 hours. I have a friend who takes 4 full days over the holidays to complete this exercise. That maybe excessive. Then again, he's one of the most accomplished individuals I know.
- B. There are **three major components**:
 1. Reflect
 2. Visualize
 3. PlanThey should be done in that order, as they build off one another. If you plan to take breaks, I recommend finishing a section, or coming to some other natural resting place before you do.
- C. Deviate or add, at will. This is simply my process. It's not complete, and by no means for everyone. But, hopefully, it acts as a good starting point for you.
- D. Enjoy it! This is your life we're working on here. Chances are, you won't spend this much concentrated time working on yourself again for another 365 days.



Stage #1: Reflect

Think back over the last 12 months, and take stock of your progress; your growth. We grow from success and (hopefully) we grow from missed opportunities. I'm a big fan of lists, and I use four of them here:

- **Major Milestones:** What did you accomplish this year? What are you most proud of?
- **Major Setbacks:** What didn't go so well? What turned out differently from what you were expecting?
- **Major "Completes":** Are there any chapters of your life that came to a close this year? ex. Student, Stay Home Parent, Boyfriend/Girlfriend, etc?
- **New Dreams:** What's become important to you in the past 12 months that maybe wasn't before?

WHY?

This is where most people exit the program. It's not enough to strictly list the superficial elements of the past year. To truly learn from them, we need to go deeper. We need to ask **WHY?** I typically categorize the "Whys" as one of three things:

- **Actions** I took
- **Habits** I formed
- **Attitudes** I developed
- **Circumstances** beyond my control
 - Go deeper here. Don't cop out and blame all instances, good or bad, on "circumstance". In my experience, there are very few circumstances that we didn't somehow involve ourselves in through our actions, habits or attitudes. What actions, habits or attitudes put you in a position where that circumstance could affect you?

Stage #2: Visualize

Think about the upcoming year. Think about yourself moving through it. Imagine yourself in the same day next year, looking back over your accomplishments of the last 365 days. What do you want this year to be about? What do you want to accomplish, and to what extent? Think through the specifics, and put them into one of four "vision buckets":

- Personal
- Professional
- Financial
- Fun

Don't worry about the "how" yet, and don't let "yeah, but's" creep into the vision.



Stage #3: Plan

Planning is about combining your vision items with the learning you have from your reflection. For each item in your vision buckets, you'll want to create a "SMART" goal. I take slight liberties with the acronym, "SMART". Here's my breakdown:

S = Specific.

(You need to know when you've achieved your goal. Make it into something that can be answered "yes/no" to the question, "Was it achieved?")

M = Measurable.

(Can you track your progress towards your goal in a meaningful way? Studies have proven that we are more likely to achieve our goals if we are able to measure our progress)

A = Activity.*

(What specific activities do you need to take in order to accomplish this goal? Visualize all the steps, so you know what you're committing to.)

R = Realistic.

(Are your **activity items** realistic? Define **how** you're going to make it happen.)

T = Timeframe.

(What's the date you're planning to accomplish this goal? Seth Godin defines this as a "Ship Date". Also, think through some of the specific "activity" items for the goal. Should you have calendared items for any of the major steps of the process?)

*It's the "activity" where most people fail in their New Year's Resolutions. We set these grand, lofty goals, without taking into consideration the actual work required to achieve them. It's not as though any of us are walking around with a "spare 2 hours a week". We've done a great job at filling every minute we have already. If we want to introduce new habits, or achieve new things, we need to be consciously aware that we'll need to make sacrifices. In a nutshell, **we'll need to change, in order to change.**

