

Annual Review Process

Table of Contents

<i>Quick snapshot of 2023</i>	<i>1</i>
<i>Part 1: Lightning Round</i>	<i>2</i>
<i>Part 2: Moments & Milestones</i>	<i>3</i>
<i>Part 3: Annual Reflections</i>	<i>4</i>
<i>Part 4: Plan for 2023</i>	<i>6</i>
<i>Part 5: Execution Plan for 2023</i>	<i>7</i>

Quick snapshot of 2023

Off the top of your head, what are your goals for 2023? These aren't set in stone. It's just a way to capture what's top of mind for you as you think about the upcoming year. We will look back and potentially adjust these after we complete the entire exercise.

- 1.
- 2.
- 3.
- 4.
- 5.

Part 1: Lightning Round

For the items below, write 3-5 words or phrases that leap to mind as it relates to your 2022.

- Money
- Technology
- Spirituality
- Leisure/play
- Family
- Friends
- Intimacy
- Exercise
- Health (physical)
- Health (mental/emotional)
- Career
- Creativity
- Reading
- Nature
- Alcohol
- Music

Part 2: Moments & Milestones

Open your calendar, journal, camera roll, and anything else that you used consistently throughout the year that might provide insight into your daily life. What stood out?

Q1 (January-March 2022)

Moments	Milestones (Positives)	Failures (Negatives)

Q2 (April-June 2022)

Moments	Milestones (Positives)	Failures (Negatives)

Q3 (July-September 2022)

Moments	Milestones (Positives)	Failures (Negatives)

Q4 (October-December 2022)

Moments	Milestones (Positives)	Failures (Negatives)

Part 3: Annual Reflections

What are you most proud of this year professionally and personally?

What didn't you accomplish this year? What obstacles got in your way? What behaviors or habits held you back? What beliefs about yourself held you back?

Who made a difference in your life this year? What new relationships did you build this year? What relationships were taxing or disappointing? Why/how?

What behaviors boosted / degraded your health this year?

What were your favorite creative or artistic influences this year (movies, books, museums, art, music, etc.)?

Cornerstones

For each category, answer the following questions: *What went well? What not so well? What did you learn?*

Health

Went Well	Not So Well	Lessons Learned

Work

Went Well	Not So Well	Lessons Learned

Love

Went Well	Not So Well	Lessons Learned

Play

Went Well	Not So Well	Lessons Learned

What brought you the most happiness and hope for the future?

What brought you the most disappointment and worry?

What lessons did you learn that will serve you best in 2023?

Part 4: Plan for 2023

What big issues or questions are you still wrestling with?

If you knew you couldn't fail, what would you do first?

What do you know or believe to be true that you are not acting upon? What's holding you back?

Vision for 2023

Fast forward to a year from now... Where are you? Who are you with? What accomplishments were you most proud of in 2023? What kind of person were you? What did you create? Who helped you to be accountable to your commitments and achieve your goals?

Goals for 2023

What are your broad goals for 2023?

- 1.
- 2.
- 3.
- 4.
- 5.

Part 5: Execution Plan for 2023

Example: Goal No. 1 – Good personal health

Objective	Action Steps	Metric
Healthy diet/lifestyle	Adopt new diet plan Clean/restock pantry and fridge Drink more water Cut snacks, alcohol, sweets, 2 nd helpings	Below 185 lbs. by Q2 Below 180 lbs. by Q3 HDL cholesterol 40-60 LDL cholesterol 80-100
Vigorous exercise	Daily swim, bike, walk or weights	Exercise 1 hour/day
Low stress	Daily/weekly meditation/stretching	TM or yoga once/week
Low pain/discomfort	Manage pain/discomfort issues	Update stretching routine Stretch 30 min/ day
Good health insurance	Maintain Supplemental F plan Explore other Medicare options	Minimal cost sharing Update plan by 12/7/23

Goal No. 2 –

Objective	Action Steps	Metric

Rocks - Pebbles - Sand

Another version of an execution plan (and one that I use) is Rocks Pebbles Sand. It means taking the big focus areas or goals (Rocks) and breaking them down into monthly and weekly action steps (Pebbles) and then further into daily habits (Sand).

For instance, I'm working toward completing a draft of my flash novella this year. That's my Rock. My Pebbles might be signing up for and taking Nancy Stohlman's Flash Novella workshop or completing one chapter of the novella. Examples of the daily habits (Sand) are writing 500-1000 words, reading one article for research purposes, and opening up and reading my great grandfather's journal.

This is how I structure my monthly sprints. I set new Pebbles each month and then review them on a weekly basis.

*All goals, objectives, action steps should fit the **SMART formula**, which stands for Specific, Measurable, Achievable, Relevant, and Time-bound.