

My YearPlanDay

for [Work in Progress](#) readers

Hi there! Here's my template for doing a yearly review. I walk you through it in [this newsletter](#).

Go ahead and make a copy of this document for yourself. Go to File → Make a copy. Give it a name that makes sense for you. Then:

Just follow the steps. They're ordered so that you'll end with the top section. That way, the document starts with a summary. When you look back later, you'll first see a nice, concise overview of your year.

Enjoy!

—Rick Pastoor

Step 4: Summary

After you've completed the other steps, come back and jot down a few sentences about your year here. What jumps out? How would you sum up your year?

Step 1: A look back

Highlights and lowlights

Start by taking a good look at your year. Jot down what went well, and what could have gone better. Use your calendar, photos, and social media to refresh your memory. How did you cope with the unexpected things this year threw your way? What would you do differently if you'd known what was coming? What did this year bring that you're grateful for? What are you proud of?

The highlights:

-

The lowlights:

-

Goals

Did you set goals last year? Make New Year's resolutions? How'd that go? Add them here and review each one. Completed a goal? Fantastic! Note that here, along with what you learned. Failed to complete it? Jot down briefly what went wrong.

Categories

*Now look back on your year using whatever categories make sense for you. Here's the list I'm using: **Work, Partner and home life, Wider family, Friends, Health, Spiritual life, Skills, Side projects, Fun, Giving, Quitting, Money – Income, and Money – Savings.** For each category, what did you do? What didn't you do? What went well? Where did you slip up?*

Take your time.

- Work
-
-
-
-

Quarters

Take a look at each quarter and jot down a couple of sentences about what you notice. It helps to look across categories to consider longer time periods. That way you can see seasonal differences and get a fuller sense of your year.

- Q1:
- Q2:
- Q3:
- Q4:

Step 2: Brainstorm

Now take some time to think about all those things you'd like to do, in the broadest sense. Do this for whichever categories you used in Step 1. Make your aspirations as big and bold as you can at this stage! You'll make a selection later.

Step 3: Set goals

Next, pick a few of your brainstorm ideas and turn them into concrete goals to work with in the coming 3 months. There's only 2 criteria for goals: You have to be super excited about them, and you need to frame them in ways that make it 100% clear when you've met them.

Back to the top

You'll find the final step for completing your review, step 4, at the top of this document. Fill that in, and you've got a great start to building a plan for the year to come.