Each December, we set aside time to reflect on the past year and to then plan for the year ahead. Not only does this improve our efficiency and likelihood of success, it also infuses my team with a sense of clarity, excitement and commitment that fuels us into the New Year.

While you don’t need to write a 50 page business plan to prepare for the year ahead, you do need to take a few essential steps that will provide you with an eagle’s eye view of what you will achieve in each quarter of the coming year. We call it Phase-Based Planning and it’s been a powerful element of formula for success – as well as our client’s.

Four Proven Steps to a Business Breakthrough

Over the next three weeks, my intention is to support you in each of these steps to create a simple plan for you to work from in the coming year. This 4 step process will support you in building an annual plan, and it can also work as you dive down into the more specific activities you want to focus on going forward.

Here are the steps we’ll take together...
Step 1: Get honest about where you are and what’s working for you
Step 2: Get crystal clear about where you want to be this time next year
Step 3: Clarify what needs to happen each quarter next year to bring your vision into reality
Step 4: Commit to a new way of being so that you bring your best self to every aspect of your life

So let’s get started!

In this first step you will...
- Take an honest look at your accomplishments over the past year and what you learned in the process.
- Celebrate your success
- Identify what you could have done differently
- Create a solid foundation for Step 2
Looking Back to Look Forward

Before we can begin to build your plan for success, it is helpful to look back at your last year. What has worked well as you look back? What were your major successes and where did you perhaps come up short versus your plans?

To support you in “looking back to look forward”, set aside some quiet time and consider the following questions...

What were your five biggest successes in the last year?

1) 
2) 
3) 
4) 
5) 

What significant goals did you achieve in the last year?

Looking back, what are the greatest lessons you learned in the last year?

List three things that you want to do more of in the next year.

1) 
2) 
3)
List three things that you want to do less of in the next year.

1)
2)
3)

If you had it to do all over again, what would you do differently?

What key collaborations did you create in the last year?

What key infrastructure projects did you put in place in the last year?

What events did you attend that made a difference in your business?

Looking Forward

Congratulations! You've taken the first step to creating a powerful foundation for the upcoming year! Keep these documents available as you consider your vision for the upcoming year in the next step. Watch your email for all the details.

In the meantime, check out one of my favorite tools to take inventory at the end of the year, my Business Innovation Quiz. Access the quiz here now!

Watch your email for Step #2: Turn Up the Volume on Your Vision. I look forward to what’s next!