

ANNUAL “PLANNING” DAY

Year End Inventory

So much of what we need to know and want to learn comes from fully absorbing what happened this past year, and using what we've learned to move forward wiser and stronger.

The more deeply we ground ourselves in the past (and the present), the more easily we flow into the future that is waiting for us. When we move forward without taking time for reflection, we miss out on a treasure chest of insight and the satisfaction of appreciating where we've been.

We will be using the first hour of the Annual "Planning" Day for some Experiential Digestion. However, you will get much, much more from that first hour if you take the time to do an Inventory of the year, and to sit with any emotions that arise out of that.

Here's how I suggest you do that.

How Much Time

How much time you can spend, and how much time you want to spend will determine how you do your Inventory.

I LOVE this stuff, so I carve out three to four hours to do the most complete Inventory I can, all of which I describe in this handout. I look at last year's Planning, I look at my calendar, I look at my business journals, and I write about the Story of My Year. I even go over my list of what happened and my Story several times.

If you don't want to devote that much time, one step down would be to take about an hour to go through your planner or calendar, and a half hour or so to write down the main themes of the Story of your Year.

If you are looking at this the night before or the day of the Annual "Planning" Day, I would quickly flip through the calendar or planner to refresh your memory, and then write a brief version of the Story of Your Year.

Make It Yours

In the following pages, I'll share my suggestions for reviewing the past year. Everyone's brain and psyche are different, so feel free to adapt the process to your own needs and preferences. Make it more visual, or more experiential. Take more time or less. Add exercises that inspire you.

I'll also share examples of what answers I came up with, and some sense of how much time to allow for each step.

When To Do It

I recommend that you do this work roughly the week before our "Planning" Day so the Inventory is fresh in your mind when we meet. If you want to do this in a more leisurely fashion, you might start the weekend before our "Planning" Day. If you want to do this more quickly, you might do it the night or two before we meet.

Looking with Clear Eyes at the Year That Was

Before you do any assessment of the year, you want to re-engage with the actual facts of the year. What did you do? Where did you go? Who did you spend time with? What projects did you work on?

Surprisingly often, our initial impression or memory of the year differs from what actually happened. You may have forgotten what you were focused on last February, or how you filled your days in April. Or what mattered to you in June. Looking back brings some nuance and complexity to your picture of what happened.

Set the Stage

Set the stage for this work in a way that supports you. Light a candle. Put on soothing music. Turn off the phone. Make sure you have water or tea to drink. You may also want to say a prayer or set an intention for what you want to create in the coming session. (I sometimes do Five Rhythms and a meditation.)

What Were You Thinking Last Year?

Look at last year's planning. If you did any form of planning last year – a theme, a word, intentions or goals, last year's Annual "Planning" Day notes – start by taking a look at that. Feelings may rise. Notice what you wanted, and what you imagined. Write some notes.

Gather Your Materials

Then, move into fact-finding and detail gathering. Find tools to prompt your memory. Gather together anything you used to track or record your year. This could include:

- Your planner
- Your online calendar
- Your business journal
- Your personal journal
- Bookkeeping or other financial reports
- Morning pages

I encourage you to use a combination of simple information like a calendar, which gives you the who and what and where, along with something that gives you more of the feeling, the focus, the emotion, like a business or personal journal.

For those of you who've worked with me this year, you might also gather together:

- Your monthly or quarterly reviews
- Your Monday and Friday check-ins from our FB group (I'd actually suggest keeping a file of these throughout the year)

Look at Both the Facts and the Feelings of the Year

A planner or calendar is a great start, and it's what I would call the bare bones of your year. If you have time, I strongly suggest looking at any records that capture the feelings you have, that capture more detail of what you were thinking and feeling as you moved through the year.

I usually start my Inventory with my online calendar where I track my appointments, and then I go through my much more detailed business journal, where I plan each day, take notes from trainings and coaching sessions, record brainstorm, and jot notes and ideas. I filled about four notebooks last year.

Going through my online calendar usually takes me about an hour, and going through my more detailed business journals takes me close to two hours.

Start a New List

Look with clear eyes and without judgment at what unfolded. Notice the rhythms and cycles of your interests and efforts. Notice what entered and left center stage.

As you go through the year, keep a running written list of what stands out. Write down what you forgot, something that took a lot of time, something that surprised you, or any observations you have going through your planner. My notes included:

- Names of new clients
- Names of new friends I started to spend time with
- Training I took and invested considerable time in working through
- The fact that I had regular massage appointments
- The milestone of turning 50
- Family travel
- Observing the number of pages I used doing menu planning early in the year
- Feelings of being drained and depleted early in the year
- Winning a gift certificate to an Etsy jewelry store
- Priorities I identified in a "Nurture Your Family" retreat
- Concerts I went to

Don't Assess Before You Observe

Once upon a time, I used to organize what happened in different life categories: work, money, fun, personal growth, etc. But I no longer think it's that useful. I find it more useful to look at my life as a whole.

I also used to divide the year into "the good stuff" – celebrations, growth, progress, successes, wins – and "the hard stuff" – disappointments, failures, upsets. But, I think these are artificial divisions that actually flatten the richness of what we actually lived. The pleasure and the pain and the growth and the challenge are so interwoven, it's not that good a use of energy to tease them apart.

Keep Breathing

You may experience some emotion as you go through all these pieces. Maybe joy and gratitude for all the beautiful things that did happen. Perhaps grief at what didn't come true, or frustration that you are setting the same goals each year but not making progress.

Invite all these feelings to the table. As Rumi says about feelings in his poem "The Guest House," "be grateful for whoever comes, for each has been sent as a guide from beyond."

Make Room for What Was Hard

Take a moment to acknowledge what was hard this year. Write down what was hard and unexpected, the things you couldn't have known were coming or have planned for. You might also list some of the hard, familiar things you struggled with over and over again this past year.

Where was there disappointment?

You might write a little about each of the hard things this year, what happened, and how it affected you.

What Happened in Your Business?

While we will also look at the whole of your life, I strongly recommend you also look at your business numbers. Questions you might want to answer about your business this year would include:

1. What was your gross revenue so far this year?
2. What was your profit so far this year?
3. How did your income break out by different income streams or offerings?
4. How did your income break out by month?
5. How many new clients came in this year?
6. What events and offers did you put out this year?
7. Did you test or introduce any new offers this year?
8. Did you retire any offers this year?
9. How powerfully did you connect with your clients? Which clients did you or did you not connect with as strongly?
10. How much engagement and response did your marketing generate? What did and didn't generate engagement or response?
11. How consistently visible were you this year? Where were you visible?
12. How did you improve your business foundation this year?
13. What training did you get this year?
14. What support did you bring on this year?

Business is one of those areas where reviewing can trigger shame, sadness, or grief.

So, as you look at and answer these questions, lots of love, compassion, and tenderness for yourself.

Notice if you are slipping into stories like:

"I did x, y, and z, BUT . . .

"not as much as I wanted"

"not as much as I should have"

"I am behind where I should be"

"I didn't do as well as person m"

Mostly these are B.S. ways we torment ourselves and minimize what we actually did.

Love and tenderness and compassion and forgiveness for all we did or didn't do this year in our businesses.

Learning to Grieve

One thing I don't hear about much in business development is the power and importance of grieving. The truth is, any vital business has moments of joy and triumph, and moments of loss and defeat. When our business is how we express our souls in the world, these losses can be painful and deeply felt.

Just being human - opening to desire, reaching for a vision, holding a dream, taking steps to make something real - holds within it the vulnerability, the possibility, of falling short. When we turn away from that sorrow, and push away the shame we feel, we keep ourselves from grieving. And when we don't make time to grieve, our capacity to form the next dream, to connect to a new desire, to hear the whispers of where to turn next starts to dim.

We all too easily become resigned. We swear off goal-setting. We settle for what we have. Or we aim for something small and manageable, what we believe will be more easily attained. We start to confuse our real needs for self-care and comfort with the impulse to protect ourselves from further hurt.

There are many messages in our culture that say - that's the past, move on, get over it already. And yet, our capacity to take on new challenges is directly related to our willingness to feel these losses when they occur.

So as you end this year and prepare for the next, I urge you to make some time to grieve. To list your losses, failures, shortcomings, and sit with them in silence for a moment, allowing yourself to feel the sadness. Allowing yourself to dissolve for a moment into anger or resentment or shame knowing that you, your soul, your being are much larger and more expansive than this one loss, this one failure.

Feeling your way through the darkness back to yourself, to the reality that no matter what did or didn't happen in your business this year, you are still here. You are still living, still breathing, still alive. You are intact. And from there, you can begin to imagine something new.

You can use this version of the Ho O Pono prayer to send love to the parts of you that feel sad, powerless, weak, confused, in the face of what you see in your life this last year:

- *I send the energy of love to the part of me, the part of everyone that feels sad and discouraged as I look at my year.*
- *I send the energy of love to the part of me that judges myself as not being good enough, as not having done enough. The part that discounts what I did do, and dismisses it as not good enough.*
- *I am so sorry for the pain and sadness you are feeling right now. I am sorry for the weight and burden you carry with you.*
- *Please forgive me for any ways in which I have judged you or blamed you or added to your burden.*
- *Thank you for bringing this to my attention for healing and transformation.*

What is the Story of Your Year?

If you were telling someone the story of your year, what would be the key themes and threads? Where were you devoted? What commanded your time and energy? Where did things change or move?

As you list each item or element, take some time to write a bit about each. Allow the heft of this time and this part of your life to settle into your body. What emerged in this part of your life? What did you learn?

I came up with 10 "things" one year. Some of those things included:

- My son's health challenges
- Inner Healing work
- Struggling with my memoir writing
- Emergence of a new direction in my work
- Turning 50 and all my feelings around that

Writing about each of those filled about three pages total.

In our first session of the "Planning" Day, we'll do more Digestion of the year. We'll ask many more questions to help you harvest the learning and growth from the past year. That said, if you are having insights or new clarity just from going through your year, write them down now.