

I like to call this Year-end Digestion rather than Year-end Review because we don't want to just look back at the year with a dry eye, we want to taste, savor, and absorb all the goodness (as well as all the medicine) of the year we have lived.

The first step of that Digestion is an Inventory of the year. It's an Inventory, because like a retail inventory, we are going to take a careful detailed look back at the year. We are not going to guess or assume or even just feel into the year. We are going to use source material, refresh our memories and experiences, and allow that review to move us and inform us.

WHY IT MATTERS

Two things feel important about doing an Inventory, and not just diving in to reflection or analysis of the year right away.

The first is that our memories are spectacularly inaccurate or incomplete. There's something called Peak-Ending Theory that posits that when we remember something we focus primarily on the high or low point of what we are looking at, and at what happened most recently. So that means in a year, that you'll mostly reference the most intense experiences of the year and probably the past few weeks! And that leaves out so much lived experience.

Every time I do this process in my groups, people tell me that they rediscover experiences and events they'd completely forgotten were part of the year. Important happenings, often from earlier in the year, that shaped them, that informed, that colored their journey.

In many cases, as business owners, we have a negativity bias about what we've done, what we've accomplished. We forget how much we've done, important milestones we reached, projects we devoted significant time and energy to. So in doing the Inventory, clients tell me that they start to feel much better, much more positive about their year. They connect more with their own strength.

The second is that taking time to look carefully over the year is a way of honoring ourselves and the path we've walked. Of taking time to remember, note, and consider the richness and complexity of the lives we've lived.

FINDING GOOD SOURCE MATERIAL

The biggest misstep in doing an Inventory is relying on your memory rather than using source materials to ground you in **WHAT ACTUALLY HAPPENED!**

So, the first challenge in doing your Year-end Inventory is to decide what your source material will be, the places you'll go to track your year. The source material you choose will somewhat determine how long it will take to review the whole year, and will color what aspects of the year you'll focus on the most.

I usually recommend you start with your day planner, or the equivalent of your day planner. This could be a paper planner or a business journal. Ideally, it will give you both the factual information about the day (where you went, what you did) and some of the feeling of the focus or energy of the day. This could be considered your primary source.

I, for example, use an online calendar to track my appointments, but a spiral notebook to plan each day. I include all my scheduled appointments, and also both my personal and business to dos, as well as any resources (book titles, people, information) that I gather that day. In between the pages for each day, I take notes for classes, or do practices like morning pages. I brainstorm business ideas, and I strategize. So, reviewing my online calendar gives me a higher-level view of what I've been up to, but my spiral notebook, my business journal, gives me quite a rich picture of where I was focused each day.

That said, my brilliant clients have also reviewed:

- the photos they took this year
- the emails they wrote this year
- a bullet journal or diary for the year (this could be quite time consuming so only wade in if you have the time and bandwidth)
- notes from a Quarterly Review (we do this in the Action Circle)
- Monday/Friday check ins (also something we do in the Action Circle)

Please note, I don't recommend you use ALL these resources as it will make the Inventory go so slowly it will likely drive you crazy! Choose the ones that feel most intriguing, inspiring, or revealing for you to look at. Choose ones that let you move forward at a reasonable pace.

BUSINESS METRICS

If you are a business owner, your inventory could also include reviewing your business numbers. At the most basic level, profit and loss, annually, but maybe also monthly. So your source material for that would be the bookkeeping reports from the year as well as things like your estimated income and expenses for the year. You could also track down names and numbers of new clients, revenue per clients, number of sales conversations, number of talks given, and so on.

TRACKING THE EXPERIENCE

So, one more tip. I strongly recommend as you begin to look over your source material, that you have a notebook along side of you. As you look things over, note your observations. What strikes you as you begin to look at what happened? What had you forgotten? What do you see now looking back that you didn't see before? What did you spend time on? Where was your attention?

FEELING THE FEELINGS

As you move through your Inventory, it's likely that you feel something. You may feel proud, tender, excited, or inspired as you see the path you walked. And it's likely that you may also feel sadness, disappointment, shame, or disappointment.

One of the things that will deepen this exercise is to pause and allow yourself to feel what arises. You may need to put down your notebook, put your hand on your heart, and just breathe. Allow the feelings to rise up. Notice where you feel them in your body.

You may want to say soothing and kind things to yourself. “You’re ok, this is what it feels like to be sad.” If you have trauma in your background, make sure you have resources or support to contain yourself and your feelings.

Part of the beauty of being human is the range of emotions we feel. If you can safely feel those feelings, it will deepen your understanding of where you’ve been and create more space for you to imagine the New Year.

HOW MUCH TIME?

Give yourself ample time. I find it can easily take three hours to really look over the year. You might take more time, you might take less.

I encourage you to complete your Inventory by this coming Saturday, December 5, when I’ll give you your next assignment on Deep Reflection on the year.

So consider carving out a little time each evening (you don’t have to do it all in one batch) or a block of time one day this week.

Ok, let’s go!