

Year-end Inventory

The first step of our Annual “Planning” Ritual is an Inventory of the year.

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.

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 when you look back at this past year, you’ll mostly reference the past few weeks colored by the most intense experiences of the year!

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.

As business owners, we tend towards 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 Year-end Inventory, clients tell me that they start to feel much better, much more positive about their year.

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.

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It's a way to reconnect to the yearnings of the past year. It's a way to recognize all the good effort and commitment you took day by day, week by week, month by month.

It's a way to see yourself more clearly. And how you see yourself directly shapes what you can and do take on in the New Year.

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 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.

For example, I use an online calendar to track my appointments, but a spiral notebook to plan each day. In my business journal, 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.

In general, you want something more detailed than a wall calendar but less detailed than a daily diary.

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That said, my brilliant clients have also reviewed:

- the photos they took on their phone
- their email inbox
- 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)

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

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?

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Feeling the Feelings

As you move through your Inventory, it's likely that you feel some things.

You may feel proud, tender, excited, or inspired as you see the path you walked.

And you may also feel sadness, disappointment, shame, or disappointment. That's ok. Feeling these harder things is part of the value of doing the Inventory.

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. Notice where you feel them in your body. Do they have a color, a shape, a temperature?

Welcome them. Say soothing and kind things to yourself. "You're ok, this is what it feels like to be sad."

I've heard it said that if we allow ourselves to feel something fully, we are often done feeling it within about 90 seconds. So if you can stay with that feeling, you may find it passes more quickly than you expect.

You can also support yourself by saying out loud or to yourself:

"I accept that I feel _____ (sad, angry, embarrassed)"

"I forgive myself for feeling _____"

*"I forgive myself for judging myself for feeling _____" **

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.

You don't want to gloss over or avoid these feelings.

Feeling them frees you to move forward with more strength and clarity. It means you can better create from desire and not in reaction to what you judge about the year.

**exercise from Rebecca Skeelee*

If you have active trauma, you may need extra support for this.

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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.

During our live Inventory event, you'll have about 2 hours and 15 minutes.

If you need more time, you'll have a week before our Year-end Review to finish your Inventory.

Ok, let's go!