

Year End Practice

Personal + Business Toolkit /

Steven Morris



“What’s in the way, is the way”

Each year I take time to reflect and rediscover on the year that’s passing. I’ve practiced some reflection and planning ritual since 1999 and keep refining my approach and process. As well, since 2015 my wife Chris and I run a year-end retreat at her yoga studio entitled *Consciously Creating Your New Year*.

The approaches and practices that follow come from my practice and experimentation, and the inspiration, teachings of friends, and colleagues.

Pulling from these practices and our combined workshop, I’ve laid out the following practice and related questions that invite folks (that’s you) to look back at your year and look forward into your coming year for clarity of intention setting.

Being deliberate about this approach can form insight, awareness, awaking, offerings, and clarity for how your life is speaking to you now and how you would like to live the gift of life going forward.

Planning your year is a valuable habit. It can help you become more aware of and celebrate your successes, understand your sorrows, and help you realize how much can happen just in a year. By learning from the past you can plan your future in a way that you don't repeat the same patterns and feel more in control of your own life and business.

This booklet will help you assess the past year and plan the year ahead of you.

Looking back:

Plan for 3-4 hours of uninterrupted time to look back. I recommend you do this practice in 1-2 sittings, then take a break to transition into the "Looking Ahead" practice.

Looking ahead:

This portion focuses your intentional creation for the year ahead and helps you to hone in on what's most important for the new year you are stepping into.

The past year

Go through last year's calendar week by week. If you see an important event, family gathering, friendly get-together or a significant project, write it down here.

This is what my last year was about

What aspects were the most important to you in the following areas last year*? Which happenings or events were the most significant? Summarize briefly.

This is what my last year was about:
personal life and family

belongings (home, objects)

friends, community

intellectual

finances

work, studies, profession

relaxation, hobbies, creativity

health, fitness

emotional, spiritual

bucket list**

* The aspects are defined by what is important to you. It is purposely not defined, as you should define it.

** In case you achieved something this year that you always wanted to achieve.

Six sentences about my past year...

The wisest decision I made...

The biggest lesson I learned...

The biggest risk I took...

The biggest surprise of the year...

The most important thing I did for others...

The biggest thing I completed...

Six questions about my past year...

What are you the most proud of?

Who are the three people who influenced you the most?

Who are the three people you influenced the most?

What were you not able to accomplish?

What is the best thing you have discovered about yourself?

What are you the most grateful for?

Most memorable moments.

Describe the greatest and most memorable, joyful moments from last year. Write or draw them on this sheet.

How did you feel? Who was there with you? What were you doing? What kind of smells, sounds or tastes do you remember? Why were these moments memorable?

List your three greatest accomplishments from last year here.

Three of my biggest accomplishments:

- 1.
- 2.
- 3.

What have you done to achieve these?

Who helped you achieve these successes? How?

List your three biggest challenges from last year here.

Three of my biggest challenges:

- 1.
- 2.
- 3.

Who or what helped you overcome these challenges?

What have you learned about yourself while overcoming these challenges?

Forgiveness.

Did anything happen during the past year that still needs to be forgiven?

Deeds or words that made you feel bad? Or are you angry with yourself? Write it down here. Do good for yourself and forgive.*

* If you don't feel ready to forgive yet, note it down anyway. It can work wonders.

Letting go.

The past year Is there anything else you need to say?

Is there anything you must let go of before you can start your next year? Draw or write, then think about it and let it all go.

Letting go of 2019 / Summary

The past year in three words.

Choose three words to define your past year.

1.

2.

3.

The book of my past year

A book was made about your past year*. Write down its title.

* Or maybe your past year was made into a movie, if so, what is the movie title?

If there is anything else left that you would like to write down, or there is anybody you would like to say goodbye to, do it now.

Farewell to your last year!

Thank it. Bless it. Release it.

You're done with the past year.
You have just finished the first part.

Take a deep breath.
Get some rest.



2020

The Year Ahead

What does the year ahead of you look like?

What will happen in an ideal case? Why will it be great?
Write, draw, let go of your expectations and dare to dream.

This is what my next year will be about.

Define the most important aspects of next year in the following areas*. Which events will be the most important? Summarize briefly in a sentence about each of the following.

personal life and family

belongings (home, objects)

friends, community

intellectual/education

finances

work, studies, profession

relaxation, hobbies, creativity

health, fitness

emotional, spiritual

bucket list**

* We still don't have exact definitions, use your own discretion.

** This is where you can list those goals you eventually want to achieve.

Trifectas for the year ahead

Summarize briefly in a sentence about each of the following.

These three things I will love about myself.

1. 2. 3.

I am ready to let go of these three things.

1. 2. 3.

These three things I want to achieve the most.

1. 2. 3.

These three people will be my pillars during rough times.

1. 2. 3.

These three things I will dare to discover.

1. 2. 3.

These three things I will have the power to say no to.

1. 2. 3.

Trifectas for the year ahead (continued)

Summarize briefly in a sentence about each of the following.

These three things I will make my surroundings beautiful with.

- 1.
- 2.
- 3.

These three things I will do every morning.

- 1.
- 2.
- 3.

These three things I will reward myself with regularly.

- 1.
- 2.
- 3.

These three places I will visit.

- 1.
- 2.
- 3.

I will connect with my loved ones in these three ways.

- 1.
- 2.
- 3.

With these three presents will I reward my successes.

- 1.
- 2.
- 3.

This is what my business will be about.

Define the most important aspects of next year in the following areas*. Which events will be the most important? Summarize briefly in a sentence about each of the following.

new clients & new business

my team and my culture

the effects of my work; the outcomes

what I need to learn; professional growth

financial goals

my business BHAG*

* BHAG = Big. Hairy. Audacious. Goal. I dare you to dream big here. This should be aspirational and highly motivating.

S.M.A.R.T. goals

S.M.A.R.T. goals are based on the work of George T. Doran, a consultant and former director of corporate planning for Washington Water Power Company. He published a paper called, “There’s a S.M.A.R.T. Way to Write Management’s Goals and Objectives.” In the document, he introduces S.M.A.R.T. goals as a tool to create criteria to help improve the chances of succeeding in accomplishing a goal.

S What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal? Who? What? Where? Which? Why?

SPECIFIC

M How can you measure progress and know if you’ve successfully met your goal?

MEASURABLE

A Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?

ACHIEVABLE

R Why am I setting this goal now? Is it aligned with overall objectives?

RELEVANT

T What’s the deadline and is it realistic?

TIME-BOUND

SMART: Before writing your goals on the next page, run them through the “**S.M.A.R.T.**” metrics to ensure they are achieved.

Goal Example: **I Want to Grow My Business**

Specific: I will acquire three new clients for my consulting business.

Measurable: I will measure my progress by how many new clients I bring on while maintaining my current client base.

Attainable: I will ask current clients for referrals, launch a social media marketing campaign and network with local businesses.

Relevant: Adding additional clients to my business will allow me to grow my business and increase my revenue.

Time-Bound: I will have three new clients within two months.

Summarizing my business word for the year ahead

Pick a word to symbolize (or short phrase) and define the year ahead for your business. You can look at this word if you need some extra energy, so you remember not to give up your dreams.

Three big goals for you business.

My three business goals for the year are (make them S.M.A.R.T.):

1.

2.

3.

Six sentences about my next year

This year I will not procrastinate any more on...

This year I will draw the most energy from...

This year, I will be the bravest when...

This year I will say yes when...

This year I advise myself to...

This year will be special for me because...

My word for the year ahead

Pick a word to symbolize and define the year ahead. You can look at this word if you need some extra energy, so you remember not to give up your dreams.

My book title (or movie title) for the year ahead

Pick a phrase to symbolize and motivate you for the year ahead. You can look at this title if you need some extra clarity and motivation, so you remember what you're focused on for the year ahead.

Secret wish

Unleash your heart, mind and soul. What is your secret wish for the next year?

You are now done with planning your year! Now, go forth,
be bold, and shine your brilliance!



About Steven Morris

To live and work wholeheartedly, with meaning and purpose, business leaders must know what they stand for and how to instill their beliefs in action. Steve is on a mission to help organizations and their leaders rise to their potential and make a positive impact on the world of their customers.

Over the past 25 years Steve has worked with more than 250 brands, including Samsung, NFL, Habitat for Humanity, New Balance, LG, Sony, and over 3,000 global business leaders.

Steve is a frequent speaker at events locally and nationally, including Creative Mornings, CES, HOW Conference, Social Venture Network, American Marketing Association, and AIGA conferences.

His TEDx talk is entitled *The Beautiful Business*.

He is regularly hired for in-house corporate keynotes, retreats, and workshops for organizations that include Samsung, LG, Academy for Professional Excellence, and the Port of San Diego. He's been a guest on more than 50 podcasts and radio shows across the US and Europe, and is a celebrity guest host on BISTalk Radio (an ESPN affiliate).

Steve has written and published two books, including this book *The Evolved Brand* and *Humanizing the Customer Journey*, and is working on his forthcoming book *The Beautiful Business: How to Impact the World Through the Power of Your Brand*.

In addition, his thought leadership has been included in publications Retail Observer, Business Week, Brand Week, Ad Age, Conscious Company Magazine, MarketingProfs, and HOW Magazines, among others.

Steve lives with his wife Chris and two boys in San Diego, CA. As well as being an accomplished business leader and trusted advisor, he is an author, fine art painter, a surfer, and a novice apiarist (aka beekeeper). Steve works with leaders to evolve their business, brand and culture.

You can reach me at steven@theMthDegree.com

Discover more about Steve:

TheMthDegree.com

Brand evolution, culture and business advisory consultancy.

StevenMorris.gallery

My fine art practice.

StudioLeadership.com

My partnership with two other artists and consultants, Libby Wagner and Owen Ó Súilleabháin, where we work with organizations and leaders through the tools of artists.