

SOLOPRENUER
STRATEGIC PLANNING



Year in Review

An easy-to-implement annual review
process designed to help you create the
life and business you want.

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FRAMEWORK



“Success in the knowledge economy comes to those who know themselves - their strengths, their values, and how they best perform.”

- Peter Drucker

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Assess

We can't design a path forward without first pausing to look back over our year and remember, reflect, and then learn from our experiences.



Take Inventory

Look back over the year and reflect on major moments, milestones, and memories.



Reflect

What stands out to you when you look at the major milestones, moments, and memories?



Learn

What's the most important lesson you learned this year and how do you want to use it moving forward?

Year in Review

TIPS FOR SUCCESS

Plan for it.

Block out three, 2-hour slots on your calendar to walk through the entire process. Time between sessions is helpful to tease out new thoughts and insights. Be sure to find a comfortable place to work, free of distractions, for the duration of your session.

Commit.

View this as an investment in yourself and your future. These six hours will shape your year moving forward and significantly reduce decision-making fatigue. Gaining clarity on what matters to you and where you're going is productive and strategic, yet it's tempting to put it on the back burner.

Come prepared.

I encourage you to get a notebook and write the questions down as you go. You can summarize later in a digital file, but the physical act of writing requires you to organize your thoughts in a way that can be helpful for reflection.

Release expectations.

Not all of these questions will feel relevant to you. Give yourself permission to select and respond to only the ones that resonate - and leave the rest.

Year in Review



PROCESS

Take inventory

Go back through your calendar and write down the major moments, milestones, and memories that happened each quarter, both personally and professionally.

- January - March
- April - June
- July - September
- October - December

Reflect on your success and growth

- What am I most proud of personally and professionally?
- What new skills or habits did I develop?
- Where did I feel most whole?
- What were the biggest obstacles I overcame?
- How am I different?

Process your learning

What did I discover that I want more of next year?

Follow me

For more tips on how to own your talent and charge what you're worth, build a business you love, and take strategic and courageous action to reach your goals.



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