



FIVE STEP REFLECTION + PLANNING GUIDE

PART ONE: REFLECTING ON THE PAST YEAR

Use the space below to write down some of the key moments that stick out to you from the past year.

These could be things like:

Products you've launched or services you've created,

People you've connected with or relationships that ended,

Decisions you've made or things you committed to,

Events and activities and opportunities you said yes or no to,

Things that frustrated you, held you back, or that you said "I'll never do this again."

I recommend that when you sit down for this process, you also pull out your calendar or notebook(s) to jog your memory about what happened way back early in the year, and look at once month at a time.





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It is inevitable that there will be things you try or situations you get into don't work, or don't turn out as we expected.

By categorizing some of your key moments, you can process how the year went and see where you put your time and energy.

WHAT WORKED	WHAT KINDA WORKED	WHAT DIDN'T WORK





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PART TWO: CELEBRATING + PREPARING FOR YOUR NEXT VICTORIES

Step One:

Write down 20 things you are most proud of this year - your victories! Maybe it's a financial milestone, the release of a new product, a new or repeat client, or how you acted in a specific situation.

My 2021 victories include:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.





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PART TWO: CELEBRATING + PREPARING FOR YOUR NEXT VICTORIES

Step Two:

Go through your list and put a **star** next to the ones that happened because of **YOU**; be generous and acknowledge that something you did, the way you performed/acted, or by following a plan you put into place, you made this happen.

Step Three:

Based on all your victories and reflecting on which things happened because of you, list three things that you have learned about yourself this year.

1.

2.

3.

Step Four:

How does this information help you prepare for the upcoming year?





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PART THREE: DREAMING FOR NEXT YEAR

Come up with 10 ways to finish the sentence "Wouldn't it be cool if..." and let yourself be dreamy!

This is not about figuring out an action plan or having specific 'hows'. It's about letting yourself get creative and dreamy, to think about what would make your life easier, or what would help your business grow.

Wouldn't it be cool if...

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.





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Once you have a list, pick three that you'd like to work towards during 2022. These are your "Big Three" and become the cornerstones of how you spend your time and energy during the upcoming year. Once you know your Big Three, you know what you are planning for, working towards and focusing on.





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PART THREE: DREAMING FOR NEXT YEAR

Step Two:

Fill out your Big Three below, noting:
How you will feel when you accomplish them.
How you will celebrate your achievement.

For example:

For 2022, I want to hire an assistant who manages my inbox and appointments and when I do, I will feel relieved that I have some time back to focus on growing my business.

I will celebrate by treating myself to a staycation and booking a hotel in my city just for me.

For 2022, I want to

and when I do, I will feel

I will celebrate by

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PART FOUR: SETTING THE STAGE TO WALK AWAY (AND TAKE A BREAK FEELING GREAT).

Answer these three questions to get you feisty, excited, and ready to fan the flame of your ambition next year.

What do you want MORE OF in 2022?

If you knew that the answer would be YES, what would you ask for in 2022?

How are you betting on yourself in 2022?





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PART FIVE: TYING UP LOOSE ENDS

Here are five things you can do to wrap up the year nicely and ensure that your future-self is giving your past-self high-fives for preparedness.

1. Follow up on all overdue/unpaid invoices.

This can be uncomfortable, especially when you have a personal relationship with someone. That said, it is also uncomfortable to sit and hope for a payment without asking, and if you've ever owed someone money, that doesn't feel great either. Clearing these up before the end of the year will give you one less thing to think about before the break.

Here's a script to make this easier:

Hi _____,

I'm tying up loose ends and my books show that invoice XXX (attached) is unpaid. Can you see if this matches your books?

If you have a record of this payment, I'd love if you sent the proof of payment my way, and please accept my apologies.

If you do not have a record of the payment, can you please reply and let me know when the payment is scheduled for?

I accept payment in the following ways:

- eTransfer to ...
- PayPal to ...
- Credit Card by clicking...
- Send a cheque to ...

Looking forward to hearing from you!

Have a great day,
NAME





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PART FIVE: TYING UP LOOSE ENDS

2. Clean your inbox using a service like Unroll me: <https://unroll.me/>

By connecting this (free!) service to your inbox, it will show you all the email subscriptions you have, make it easy for you to unsubscribe from as many as you want with a few quick clicks (you don't have to go into every single email and manually unsubscribe!). Hello Tidy Inbox. Goodbye 500 emails with things that aren't relevant / I don't need to buy.

3. Schedule your Out Of Office email response now, and be realistic. If you set expectations, you will not disappoint people.

If you aren't going to check your email, say it. If you are going to read email but not respond, say it. This is also a place to remind people about your store hours, shipping procedures, and holiday closures.

Here's a script to make it easier:

Thank you for your email. I'm off for a break between (date) and (date).

During this time I will be checking my email (at this frequency / not at all) and will respond (within a certain time frame / not at all).

Wishing you a great holiday break!

4. Tidy your space!

Set aside an hour or two with some good music or a podcast in the background and your future self will thank you! No old lunches, dishes, or stacks of random paper to be met with when you're back.





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PART FIVE: TYING UP LOOSE ENDS

5. Schedule some unplanned, open space for yourself in your calendar over the break.

It's easy to spend the Sunday night before coming back to work with the 'Sunday Scaries' and asking yourself "where did the time go?".

To make sure that you get some real time to do what you enjoy, block off space and time that has no set plan and is focused on enjoying yourself.

When that time comes, you may choose to cozy up with a book, watch a movie, have a nap, do a craft, or take yourself out of your space for a walk or skate or to hide out away from your family. This white-space in your calendar isn't to be filled by the expectations or needs of others. It is **YOURS**.

For more tips on how to have a true break, check out [these five tips from Productivity Consultant Ashley Janssen to reduce stress this holiday season.](#)

FINAL THOUGHTS

All this reflecting and planning can be tiring and invigorating.

My intention is that you feel settled in tying up some loose ends, you show yourself some gentleness heading into the break, and you are confident that you will have more victories in 2022 and beyond.

Cheers to you for making it through this reflection and planning guide.
Go celebrate yourself with something special!

