A blue and black logo

Description automatically generatedRearview Mirror   
Exercise

By Jane Deuber

A road with trees in the background

Description automatically generatedThroughout my 37 years of building businesses, we’ve experienced fabulous highs and disappointing lows. But one common thread among those years when we reached or exceeded our goal was that we took time to craft a vision and a plan for the year ahead. I believe one secret to our planning success over the years was our willingness to pause before leaping into the planning process, we took time to consciously look back over the year that was ending to look for clues to what we wanted in the year ahead.

The Rearview Mirror Exercise

In this exercise, you will reflect on the past 12 months so you can step into the planning process with the lessons and wisdom of the past. It’s a simple and incredibly valuable process whereby you answer a series of questions designed to coax out those events of last year where you kicked ass, met the goal and made cool stuff happen. We will also take note of those times you missed the mark, fell short or acted out of obligation rather than inspiration. The goal is to let your past inform your future so you don’t repeat the mistakes of the past and experience more joy and more success in the process.

Be Nice To Yourself!

To complete the Rearview Mirror exercise, we are going to call forth a big dose of self-love and forgiveness, so this exercise becomes a catalyst for positive change rather than another opportunity to feel regret, guilt or shame.

This exercise is NOT about lamenting, blaming, regretting or beating up on yourself. While there may have been a litany of things you would have done differently, this process is an excavation of what you want the coming year to hold for you and your business.

By replacing regret with a sense of curiosity, you’ll have the opportunity to see the past more objectively and take the learning forward.

By the way… while you are free to take as much time as you need to answer the questions, I suggest you don’t over think your answer. Typically, your “intuitive hit” is your truth, so relax and trust what comes up. There are no wrong answers!

What went well?

1. What are you most proud of accomplishing this year? (Go for 5 or more things you feel good about.)

2. What projects, campaigns, promotions or events brought you the most joy?

3. What projects, campaigns, promotions or events brought you the biggest results? (Notice which show up both in this *and* the previous question.)

4. What 3 key business relationships did you nurture this past year that you can benefit from in the coming year?

5. Where did the money flow from easily and without a lot of stress or effort?

What didn’t go so well?

1. What projects or promotions didn’t turn out as planned and why?

2. Were there decisions that were made or projects taken on that, in hindsight, you would have done differently?

3. If you had a “do-over card,” what would you have done differently last year?

4. What do you wish you had done ***more*** of last year?

5. What do you wish you had done ***less*** of last year?

Making Sense of What You Noticed

Now that you have reflected on the year you just lived, it’s time to make sense of how these discoveries will impact what you want the next year to hold for you. In the space below, answer the following questions to make sense of what you noticed.

Way to go. You did it!

You hit the pause button long enough to look at the landscape of the year you just lived. How did that feel? What is present for you? Is there a sense of accomplishment, completion and pride? Or did this trip down memory lane, leave you with a sense of melancholy, guilt or regret. No matter where you land on the spectrum, let it be OK for right now. Don’t make what unfolded right or wrong, good or bad. Just let it be and notice.

Business growth is never a straight line to the vision. There are twists and turns, zigs and zags and even an occasional crash. And that’s OK. In fact, it’s normal – especially given the year we have had.

So, my friend, take heart if you too had a year that didn’t turn out as you had imagined. Be kind to yourself and acknowledge that you are still in the game, marred with sweat and soot, and ready to go another round. I’m right beside you, suited up and ready to get to work to turn our shiny new vision into our new reality.

### Decades of Profitable Planning

A person laughing with her hands together

Description automatically generatedIn my 37 years of supporting entrepreneurs to have a kick-ass business, I’ve learned that planning can be a challenge or even loathed. If this describes you, there is hope.

I wrote my first annual plan way back in 1987 when my husband and I started our first business. Armed with $5000, a huge vision and a willingness to do whatever it would take to make the vision a reality.

While we simply “made up” that first annual plan, within two years we had turned a profit, two years later we hit the million mark and eventually grew that business to $2.5 million before selling it in the year 2000. Since then, we’ve founded 7 additional businesses, each time starting with a made-up plan, a wish and a prayer.

While the plan always morphed into something new based on the feedback we were getting, the very act of creating the initial plan launched our rockets of desire and activated our ability to take the steps to manifest the vision we were holding.

The same holds true for you. As you get more and more clear about what you want to have happen in the year ahead and lay out what steps you’ll take to get there, you too will activate your business-building superpowers to create the business you desire.

Words of Wisdom

As I bring this Annual Planning Guide to a close, I want to say how impressed I am. By investing time in planning out your year you have increased your chances of success ten time over.

Will the plan change and morph over time? Absolutely yes! However, with this first draft and a clear picture of what you need to do to make your 1-year vision a reality, you are better equipped to make wise decisions and respond to new opportunities as they arise.