

Year in Review



Company/Department Name _____

Step 1

Successes: What were key successes in the past year?

Recap what worked well in the year and identify what should be continued.

What	Quantify impact	Continue next year
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Step 2

Leveraging for Growth: What can we improve on from the past year?

What did not go as well, but present an opportunity for the year ahead?

What	Quantify impact	Continue next year
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Step 3

New Growth Opportunities: What can we pursue?

What are new opportunities or risks you anticipate which need to be addressed in the year ahead?

What	Quantify potential impact

Step 4

Bringing it all together. Prioritize and summarize from the above areas which ones need to be actioned, the next steps to be taken, and when. Now you have a framework to expand into an actionable plan for the year ahead.

Planning for the Year Ahead

Priority	What	Expected impact in the year ahead	Next step	Timeline
1				
2				
3				
4				
5				

Email the completed form to eloise@effectiveprofessionalconsulting.com for a complimentary consultation of your Year in Review