

List the things that went well last year. Were they the result of a strong system? Is it important for you to continue to be successful with them?

Start by probing your memory. Then look over your weekly reviews. Then consider looking over your calendar from the last year.

What went well?	Result of system?	Still important?

List the things that *didn't* go well. Did they result from a lack of structure? Do you need to correct them?

Follow the same path from above to uncover these items.

What didn't go well?	Lack of structure?	Needs correction?

Stop here. Let today's work sink in and complete the next set of questions tomorrow.

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After thinking about the highs and lows of the last year...

What would you like your overarching priorities to be for the coming year?

Don't worry about setting specific goals. You'll do that later. Just write down some of your bigger aspirations.

What is the common thread among these aspirations?

Looking over your answers to the previous question, what are some commonalities that exist among them?

Pick a theme for your year.

Using your answers from above, choose a word or a phrase that communicates the theme you'd like to embrace as you pursue these big aspirations.

Stop here. Let today's work sink in and complete the next set of questions tomorrow.

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After setting your bigger aspirations for the year...

What are some of the actual goals you want to accomplish?

What are the tangible things you want to do or see happen in your life or work in the coming year?

Are the goals you set above *specific*? If not, rewrite them to be more specific.

Looking at your answers above, are your goals clear and concise? Is it obvious what success will look like?

Are you in control of these goals? If not, rework them so that you are.

Are there any goals above that could be blocked by forces outside your control, think about how to structure them so that you are in complete control of success or failure.

What challenges will you face pursuing these goals over the next year?

What are the major obstacles to achieving these goals? And what is the likelihood that you'll face them?

Goal	Challenge	Likelihood

How will you overcome the challenges that are most likely to occur?

Look at the challenges you identified above and set a brief plan for how to address them if they happen.

Challenge	Plan

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After completing all other sections, use this template to write a brief, informal executive summary.

In a short paragraph, remind yourself of last year's theme and how you feel you performed against it.

Skip this if you did not set a theme last year.

List your biggest wins & losses from the past year.

Wins	Losses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

In one or two paragraphs, discuss the major lessons you learned from those wins and losses.

State your theme for the coming year.

In one or two paragraphs, discuss your major goals for the year and how they relate to your chosen theme.

In a paragraph, discuss the biggest challenges you expect to face and how you plan to address them when they arrive.

In one sentence, state how you expect to feel at this time next year if you are successful executing this plan.

You've just completed an executive summary—something you can reference whenever you need to remind yourself where you're headed and why you chose that path.

You may want to transfer your summary to a document you can easily access when you need it.