**End of Year Review**

The end of one year and the beginning of a new year is an excellent time to conduct a reflective review of your year.

Business activity and profitability is not a linear progression and can change dramatically from year to year. So it’s good to assess each year what has happened and why. How much of what you experienced was beyond your control? What could you have done differently? What changes will you implement as a result of this year’s experiences?

Consider social and health issues; new, changing or ended relationships; staff turnover; navigating hybrid work environments and new technology; mental health and wellbeing issues; difficult client conversations; and natural disaster impacts. You may have experienced some or all of these and more.

It’s good to review the year and acknowledge all that has happened for you. Looking backward can provide valuable insights for planning the coming year.

**Appraising the Past Year**

Take some time to review the past year. Whether you do an informal process over a drink with a colleague or whether you write down a detailed review, taking the time to look at what worked and what didn’t will help you to discern where to spend your energy next year. You may like to focus only on professional matters, or you could include a personal review at the same time.

* What kind of a year were you expecting at the start of this year, and what was the reality? Was there a significant mismatch between expectations and reality? How well did you navigate unexpected events and their effects on your business?
* Was your business affected by social and health issues, natural disasters, technology issues, staff turnover or any other major events?
* What worked well in the last year? Have you celebrated any outstanding achievements? Think about milestones, clients, systems, training and technology.
* What did not work well? Think about why things didn't work well and what you could change, or how you could be better prepared in future.
* Are your current systems and technology solutions up to the job you now do?
* Are you mostly happy with the amount of financial return for the time, energy and expertise you have given to your clients?
* Are you managing your workload sustainably? Do you have enough time for everything you need both professionally and personally?
* What has been the biggest learning in the past year? How will it benefit you in the future?
* What do you most enjoy about your work? Think about activities, clients, systems, technology, colleagues and professional education.
* Are there topics you would like to study to further your professional development?
* Are there areas of your business you struggle with? Is it time to outsource or engage staff or contractors or to collaborate with a colleague for support?
* What are you most grateful for at the end of one year and looking towards the next?

So, what are you going to do differently next year? What would you like to create? What positives do you intend to bring to your work with clients?

Write down your plans for the next year and commit to acting on them regularly.