



ANNUAL REVIEW AND VISION PLANNING

STEP 1 – Create a 3-year Vision

It's now December 31, 2014. Tomorrow is the first day of 2015. You're sitting on your favorite chair, writing a letter to an old friend that you just reconnected with after three years of not seeing or talking with each other. The purpose of the letter is to bring him/her up to date on what has happened in your life over those three years. If you don't like writing, draw them a picture or a mind map. Question: What would you like to realistically say has happened in your life over those three years? Remember – it's December 31, 2014. Now go ahead – pull out a pen and piece of paper, or your computer, and have fun.

STEP 2 – Where am I now?

For the remainder of the steps in this process we will use the following Life Areas. Feel free to adjust them to fit your life situation. For example, if you are in business or have a career and you are also involved in a ministry, create an area specifically for ministry. Or, if you're a student, you may want to divide Personal Growth into two (Intellectual and Spiritual). However, I strongly recommend you not work with more than eight life areas.

1. Business/Career
2. Spouse/Romance
3. Family and Home
4. Friends and Fun
5. Health & Fitness
6. Personal Growth (i.e. Intellectual, Spiritual)
7. Financial/Material

Before looking ahead to next year, spend time reviewing your past year. Here's how.

- For each life area, write down your Accomplishments or Victories
- For each life area, write down your Frustrations or Disappointments

Tip: If you need to jog your memory about the past year take a look through your calendar, or journal, or the goals you set last year. **At the end of this document, I've included a sample format to help you complete this step and the steps to follow.**



STEP 3 – Where am I going?

It's now time to look ahead and plan for next year. Here's how –

- For each of your seven or eight life areas, ask yourself, “If I could see ahead to the end of the coming year, what would have to have happened in each area for me to be happy with the progress I made in that year?” OR
- Imagine it's now December 31, 2012 and you're having dinner with friends. Ask yourself, “What would I like to be able to tell them has happened in my life over the past year?”
- For each life area, write a first-person, present-tense one-year vision statement (as if it has already happened). *Example:* Friends & Fun - “I made a positive difference in the lives of my friends.” Put aside how you feel about yourself personally and professionally. This is not about analyzing what you do well or what needs improvement. It's also not about setting goals. It's about identifying a vision. Don't reason the vision away by wondering how it could possibly be fulfilled. We'll address that next time.

“What's worse than being blind is like having sight without vision.” Helen Keller

“Let all things be done decently and in order.” I Corinthians 14:40

“Where there is no vision, the people perish.” Proverbs 29:18



STEP 4 – How will I get there?

Envisioning where we see ourselves three years from now, reviewing accomplishments and frustrations annually, and identifying vision statements for each life area for the coming year is a great beginning. But if we want to see results from those first three steps, we need to take consistent and focused action. If we don't, our dreams and visions will simply remain as dreams. Here's how to put feet to your vision statements.

- 90-day SMART Goals – For each life area vision statement, identify about three 90-day goals that will move you closer to achieving that vision. The result will be about twenty-one 90-day goals for all seven life areas. Note that it's okay to have only one goal for a given area, but be sure you have at least one for each area. If you find that you have more than three goals for a given area, it's important that you pull back in another area. Too many goals will make it difficult to focus and can set you up for failure before you even get started. The key is balance.
- 30-day SMART Goals – Go back over each life area and write 30-day goals that will move you closer to accomplishing your 90-day goals. Again – don't overdo it. Too many goals could discourage you before you get started. Write 30-day goals only for the first month (i.e. by end of January). You will write a new set at the end of each month when you get there.
- Note – Write your goals with the acronym S.M.A.R.T. in mind – Specific. Measurable. Action-oriented. Realistic. Time-sensitive.
- Moving forward –
 - At the end of each 30-day period, do a quick review of how you did with your goals for that month and identify a new set of 30-day goals for the coming month. As before, do this for each life area with the intention of moving you toward fulfilling your 90-day goals.
 - Also – at the end of each 90-day period, review how you did that quarter and write out a new set of 90-day goals for the next quarter. It's okay to repeat a goal if you feel you need to do more work on it. And don't beat yourself up if you don't accomplish everything you set out to achieve. After all, life does happen and can take different directions than what we anticipated.



EXAMPLE – To pull it all together

Here's an example of how an annual life area vision statement might look with 90-day and 30-day goals.

Health & Fitness Vision Statement

- My weight is at a healthy place, I'm free of pain, and I have a clean bill of health.

90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

- Reduce weight from 165 lbs to at least 160 lbs

30-day SMART Goals for January to move me toward achieving my 90-Day Goals

- Discuss food plan with doctor and put it into place
- Implement an exercise regime
- Get 8 to 10 hours sleep per night

Each of the above goals meets the **SMART** guidelines? They are all:

- Specific – no beating around the bush with what needs to happen in order to achieve the vision set for the year
- Measurable – At the end of the 30-day and 90-day periods it will be possible to answer yes or no (i.e. did I get 8 to 10 hours sleep each night?)
- Action-oriented – Each step requires action
- Realistic – The person who set the goals will be able to say whether or not they are realistic goals
- Time-sensitive – Because they are set within 90- and 30-day time frames, they already have a time limit on them. In other words, the intention is to reduce the weight within 90 days – not next month.

Use the following format to complete Steps 2 & 3 & 4 for each Life Area (or create one that works for you).



BUSINESS / CAREER

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Business Accomplishments (list as many as you wish)

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My 2011 Business Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Business?

Create one 1st person, present-tense 2012 Business Vision Statement – as if it has happened.

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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MINISTRY

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Ministry Accomplishments (list as many as you wish)

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My 2011 Ministry Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Ministry?

Create a 1st person, present-tense 2012 Ministry Vision Statement – as if it has happened.

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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SPOUSE / ROMANCE

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Spouse/Romance Accomplishments (list as many as you wish)

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My 2011 Spouse/Romance Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in Spouse/Romance?

Create a 1st person, present-tense 2012 Spouse/Romance Vision Statement as if it has happened

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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FAMILY & HOME

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Family & Home Accomplishments (list as many as you wish)

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My 2011 Family & Home Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Family & Home?
Create a 1st person, present-tense 2012 Family & Home Vision Statement – as if it has happened.

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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FRIENDS & FUN

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Friends & Fun Accomplishments (list as many as you wish)

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My 2011 Friends & Fun Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in Friends & Fun?

Create a 1st person, present-tense 2012 Friends & Fun Vision Statement – as if it has happened

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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HEALTH & FITNESS

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Health & Fitness Accomplishments (list as many as you wish)

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My 2011 Health & Fitness Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Health & Fitness? Create a 1st person, present-tense 2012 Health & Fitness Vision Statement as if it has happened.

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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PERSONAL GROWTH

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Personal Growth Accomplishments (list as many as you wish)

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My 2011 Personal Growth Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Personal Growth? Create a 1st person, present-tense 2012 Personal Growth Vision Statement as if it has happened.

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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FINANCIAL / MATERIAL

2011 Review

In reaching my 2011 Vision, I achieved a ____ (low of 1 to high of 10 scale)

Note: This statement will only apply once you've used this process for one year.

My 2011 Financial / Material Accomplishments (list as many as you wish)

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My 2011 Financial / Material Frustrations (list as many as you wish)

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2012 Planning

At the end of 2012, what would I realistically like to say has happened in my Health & Fitness? Create a 1st person, present-tense 2012 Financial/Material Vision Statement as if it has happened

Note: It is sometimes helpful to first list your thoughts in point form before writing a statement

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My 90-Day SMART Goals (Jan thru Mar) to move me closer to achieving this vision

Note: Repeat this step every 90 days

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My 30-Day SMART Goals for January will move me closer to achieving my 90-Day Goals

Note: Repeat this step every 30 days

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