

YEAR-END-CHECKLIST

Year End To-Do : Episode 38

Make the next year your best one yet. This guide will help you execute a strong year-end assessment that will set you and your organization up for success.

- **On a scale of 1-10, how would you rank your year?**
With 1 being the worst and 10 being perfect, assign a score based on how you feel about the past year's performance. Ask your leadership team the same question to determine if everyone's on the same page.
- **Check in on your goals.**
What goals did you set? Did you hit them? If not, what roadblocks did you run into?
Bonus question: What keeps you up at night, as a leader?
- **Systems, tools, technologies and people review.**
Look at the resources and processes that keep your organization running. Are they working for you and your team? Do you need to make changes to be more efficient?
- **Whole 360 Review.**
Don't just review your team. Get vulnerable and ask your team how they'd rank you as a leader. Where can you improve? This conversation will create deeper, more meaningful relationships
- **What's one area you'd like to focus on for improvement next year?**
Ask this question to yourself and to each member on your team. Pick one item from your personal life and one from your professional life..

END OF YEAR ASSESSMENT

Intro to Your Year

Main Question:

On a scale of 1-10, how would you rank your year? Why?

Follow-Up Questions:

With 1 being the worst and 10 being perfect, assign a score based on how you feel about the past year's performance. Explain

Ask your leadership team the same question to determine if everyone's on the same page.

END OF YEAR ASSESSMENT

Check-In On Your Goals

Main Question:

What goals did you set? Did you hit your goals?

Follow-Up Questions:

If not, what roadblocks did you run into?

What keeps you up at night, as a leader?

END OF YEAR ASSESSMENT

Systems, tools, technologies and people

Main Question:

Look at the resources and processes that keep your organization running. Are they working for you and your team?

Follow-Up Question:

Do you need to make changes to be more efficient?

Additional Remarks:

END OF YEAR ASSESSMENT

Whole 360 Review

Don't just review your team. Get vulnerable and ask your team how they'd rank you as a leader.

Where can you improve?

This conversation will create deeper, more meaningful relationships.

Team Suggestions:

END OF YEAR ASSESSMENT

Areas of Improvement - 2022

Ask this question to yourself and to each member on your team.
Pick one item from your personal life and one from your professional life.

Main Question:

What's one area you'd like to focus on for improvement next year?

Personal Life:

Professional Life:
