

REFLECTIONS & OUTLOOK

Reflecting on This Year's Accomplishments & Disappointments:

- What do I feel were MY most significant accomplishments (personal and/or professional) this year?
- What do I feel were MY Company's/Companies' most significant accomplishments this year?
- What do I feel were MY most significant disappointments (personal and/or professional) this year?
- What do I feel were MY Company's/Companies' most significant disappointments this year?

Internal/Self Reflections

- What is my life's purpose? (This is not philosophical nor abstraction, but deadly practical. It is what makes sacrifices worthwhile. It is where integrity lives.)
- What am I bartering my life for?
- What am I most passionate about today?
- If I stopped today, would it be enough?
- What concerns do I have as I look to the future?

This exercise was first developed by Vistage Chair John Younker; it has been adapted by Greg Bustin.

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Just the Facts, Ma'am:

	2 YEARS AGO	LAST YEAR	THIS YEAR PLAN	THIS YEAR ACTUAL	NEXT YEAR PLAN	% VS. INDUSTRY
REVENUE						
EBITDA						
TOTAL # EMPLOYEES						
REVENUE/EMPLOYEE						
PROFIT/EMPLOYEE						

What should the group know about these facts/trends? To what factors do I attribute any upward or downward trends? How do or should these affect long-term planning?

What were my top 3 most significant learning experiences this past year?

Where do I want the company to be in 3 - 5 years? What will that company require? Where am I the bottleneck?

What is changing? What is the 800-pound gorilla? Where is my Achilles heel? What is my greatest opportunity?

What is the most strategic thing I can attend to next year? How do I intend to communicate, measure and execute this?

What practices (specific, measurable, regular activities over time) will I engage in to enhance my development as a leader? How will I be accountable?

What do I want to celebrate one year from now? Three years?

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My – Not My Firm's – Outlook for Next Year:

- What are my performance objectives for next year (professional and/or personal)? (Refer to the following page for the action planning form.)

- How can the members of my peer advisory group and my mentor most effectively assist and support ME in the next year?

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PERSONAL PERFORMANCE ACTION PLAN

Action Item - _____

What Is to Be Accomplished in the Upcoming Year

Completion Date

Business:

Personal:

Leadership:

Expected Outcomes/Measurable Results: (Milestones)

Specific Outcome/Result

Date to Be Completed

1.

2.

3.

4.

5.

6.

7.

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