



Annual Review Activity

LOOK BACK TO LOOK FORWARD

THE STRONGER BUSINESS PLAYBOOK BY WHAT WORKS



INTRODUCTION

Review and reflection is a key part of learning—and one we often don't make enough time for.

This experience is designed as a 2-hour group reflection. It centers the questions:

- What did I learn this year?
- What will I take with me into next year?

The purpose of coming together for this experience is to witness the growth we've experienced (ourselves and for others) while also setting an intention to continue to explore and adapt into the next year.

While it is good and reasonable to review more concrete metrics and milestones (like projects completed or revenue generated), it's also important to surface softer learning. A change of perspective can be a much bigger deal than a revenue target.

WHAT WORKS ABOUT US

Tara McMullin

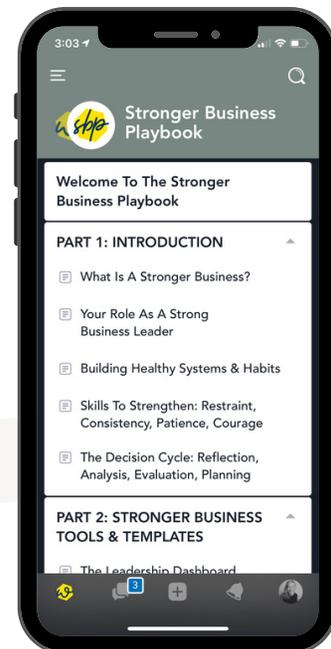
Tara is the founder & host of What Works, a platform that connects small business owners in pursuit of building stronger businesses together. She's also the co-founder of YellowHouse.Media, a full-service podcast production agency. Her podcast has been downloaded over 3 million times and her work has been featured in Fast Company, Forbes, and Inc.



The What Works Network

The What Works Network is where experienced business owners come together to level up how they run their businesses. Our shared goal is to build businesses that run smoothly, cause fewer headaches, and sustainably make more money. We host weekly support events, quarterly virtual conferences, and ongoing conversations about small business in the digital age.

[Learn More](#)

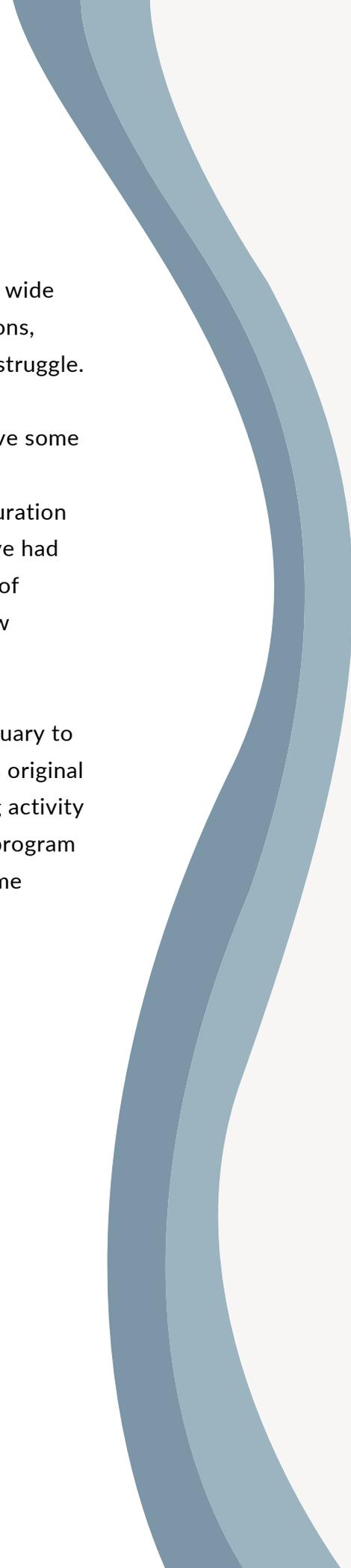


INVITATION

We designed this gathering to accommodate a wide range of experiences: big wins, small celebrations, internal growth, external challenges, personal struggle.

The people invited to this gathering should have some trust between them by virtue of preexisting relationships, agreed upon values, or careful curation by the host. It is not important for them to have had similar experiences—and, in fact, a diverse set of experiences can help attendees appreciate how circumstances can unfold in different ways.

You can use this gathering in December or January to review the past year and look to the future (its original purpose). But you can also adapt it as a closing activity for the end of group coaching or mastermind program at any time of year. You could also use this same process to check-in with a group of friends or colleagues.



Look Back To Look Forward

STRUCTURE

Opening

Set the intention for the gathering, bring a sense of presence through a short gratitude meditation, and explain the activity.

01

02

Reflection & Sharing

Over 4 rounds, participants reflect on simple questions and then share their thoughts with a small group.

Final Debrief & Closing

The group takes time to share what they've learned and what they're taking with them into the next year.

03



01

OPENING

The opening of this gathering is an opportunity to set the intention and declare the purpose of the experience. Don't take this lightly; creating the space for deep reflection is key the participants' ability to engage with themselves and others.

SUGGESTED PURPOSE: to witness the growth we've experienced (ourselves and for others) while also setting an intention to continue to explore and adapt into the next year.

GRATITUDE MEDITATION

Take a few minutes to find stillness and presence with a gratitude meditation.

To begin, invite participants to close their eyes or turn their gaze down and then bring attention to their breath. Ask them to notice the subtle sensation of air moving in and out of their nostrils.

After a few breaths, suggest that they allow their breath to lengthen—taking in a little more air with each inhalation and exhalation. Invite them to find a bit of space between each breath.

It takes a break to remember that: a break to do nothing, to just listen, to remember in the deepest sense what, when, and where we are.

— Jenny Odell, *How To Do Nothing*

Again, after a few breaths, invite participants to move their attention to the parts of their body in contact with the floor or chair. Ask them to notice the weight of their body and the effortless support underneath them.

Pause for a few more breaths and then invite participants to scan through their bodies and notice any unhelpful tension or sensation. Visit with the sensation for a moment and then invite it to go.

Finally, invite participants to place one hand over their heart and one hand over their belly. Notice the sensation of contact and warmth from the hands on the body.

INSTRUCTIONS

Explain the activity and set the ground rules for the gathering.

The main activity is 4 rounds of reflection questions with time to journal quietly, the opportunity to share what comes up with others, and then a final reflection on the two centering questions:

- What have I learned this year?
- What do I want to take with me into next year?

Each round starts with 3-5 minutes to personally reflect on the question at hand.

Encourage participants to write, draw, or meditate on their response to the question during that time.

After that initial reflection, participants share what came up for them.

If your group is 2-5 people, this can be done with the whole group. If your group is more than 5 people, use breakout rooms to divide people into groups of 2-3. We suggest doing this randomly and mixing up the breakout groups each time so that participants can witness more members of the group.

Establish the ground rules for sharing time:

- We're not trying to fix or troubleshoot anything: no advice or coaching
- When you're sharing, try not to "hedge" on what you experienced. State it sincerely & confidently, even if it feels wobbly.
- When you're listening, your job is to witness and affirm the experience of the personal sharing. If you're not sure how to respond, a great thing to say is simply, "Thank you for sharing that."

When we liberate ourselves from the expectation that we must have all things figured out, we enter a sanctuary of empathy.



— Sonya Renee Taylor, *The Body Is Not An Apology*

INSTRUCTIONS

Explain the activity and set the ground rules for the gathering.

Allot about 10 minutes for 3 people in a group to share. Two people will need a little less, a larger group will need a little more.

Once the sharing time is complete, invite participants to spend another 3-5 minutes returning to the 2 core questions (What have I learned this year? What will I take with me into next year?) and reflect on how that round informs their answers to those questions.

Finally, let your participants know that there will be 15-20 minutes at the end of the experience to debrief as a group on the 2 core questions. Ask them to pay attention to what they feel called to share as the activity proceeds.

Explaining the entire activity before you start will help reduce your participant's anxiety about what they'll be asked to do or share. For many in your group, this will be an exercise in unfamiliar vulnerability and anything you can do to put them at ease will be helpful.

In total, The Opening section will take approximately 15-20 minutes.



02

REFLECTION & SHARING

This is the main activity for the gathering. There are 4 rounds of personal reflection on a question, then sharing with the group, and finally a debrief on how that round's reflection impacts the response to the 2 core questions.

EACH ROUND



REFLECT ON THE QUESTION

Journal, sketch, move, or meditate to reflect on that round's question. There is no right or wrong way to answer any given question. Once you have your response, go deeper and see if there's anything else coming up for you.

3-5 MINUTES



SHARE WITH OTHERS

Witness what others responded to each question and take the space to share your own reflection. Don't try to fix or troubleshoot anything. There's no advice or coaching needed. Find the value in simply witnessing & sharing.

10 MINUTES - depending on size of group



DEBRIEF

Gently examine your reflection through the lens of the 2 core questions: What did I learn this year? What will I take with me into next year? Notice how your understanding of these 2 questions evolves over the course of the gathering.

3-5 MINUTES

REFLECTION QUESTIONS

Below are 4 questions that will give your participants multiple ways to look back on their experience. Try these or check the next page for additional question ideas.

01

WHAT FELT UNEXPECTEDLY EASY OR FUN THIS YEAR?

02

WHEN DID I FEEL MASTERFUL OR SKILLFUL?

03

WHAT WAS THE HARDEST PART OF THIS YEAR? HOW DID I MEET THAT CHALLENGE?

04

WHAT OPPORTUNITIES DID I CREATE FOR MYSELF? FOR OTHERS?

NOTES

MORE QUESTIONS

Depending on your group, you might want to take your reflection & sharing in a different direction.

- What did I create?
- What did I try to avoid?
- What did I learn about myself?
- How did I practice my values?
- What opportunities did I take advantage of?
- What did I learn about my business?
- How did I use my strengths?
- What new relationships emerged?
- How did I grow?
- What did I (or my business) move on from?
- Who supported me and my business?
- What habits, systems, or activities supported my wellness? The wellness of my business?
- Who did I support?
- What relationships faded?
- What did I say or do that really resonated with people? Why?
- When did I adapt to change with openness and grace?
- When did I respond to change with stubbornness or fear?
- What beliefs did I change when presented with new information?
- When was I out of alignment with my values?
- How did I contribute to my community?
- How did I refuel myself?
- How has my vision evolved?
- What new habits did I cultivate?
- What habits did I break?
- When did I rest?
- What new things did I try?



03

FINAL DEBRIEF & CLOSING

As the gathering starts to draw to a close, give participants a final chance to come together and share what they've learned this year and what they're taking with them into the next. This is also a good time for you as the host to share benediction of sorts and give participants something to hold on to as they exit the gathering and reenter the world.

FINAL REFLECTION

Thank everyone for participating and open the floor for final reflections.

Ask your participants to consider how they're now able to answer the questions:

- What did I learn this year?
- What will I take with me into next year?

Invite participants to share something that surprised them, something they're excited about, or something that makes them curious.

We recommend making this final reflection voluntary as some participants might be feeling tender or stretched after the main activity.

Do leave space for people to find their voice, though. Some pregnant silence is okay—it doesn't mean great stuff didn't happen!

Closing

BENEDICTION

“Gibrán Rivera once articulated a question to me: ‘What is the next most elegant step?’ I love this question and use it to shape conversations all the time. Too often we come up with plans that don’t take into account the fog on the horizon. Then we go off and the work doesn’t happen, perhaps can’t happen, and then we feel demoralized when our energy doesn’t flow into action or desired outcomes. An elegant step is one that acknowledges what is known and unknown, and what [your capacity actually] is.”

– emergent strategy, adrienne maree brown

As you make your way into the next year, look for the most elegant next step and honor everything you’ve learned to this point.

THE WHAT WORKS NETWORK

The What Works Network makes it easy to make your business stronger —one day at a time.

We know it can be a challenge to find the time (let alone support) to work on your business. The What Works Network gives you a jumpstart on that important work.

Have a question about how a tactic, piece of software, or system works? Just ask!

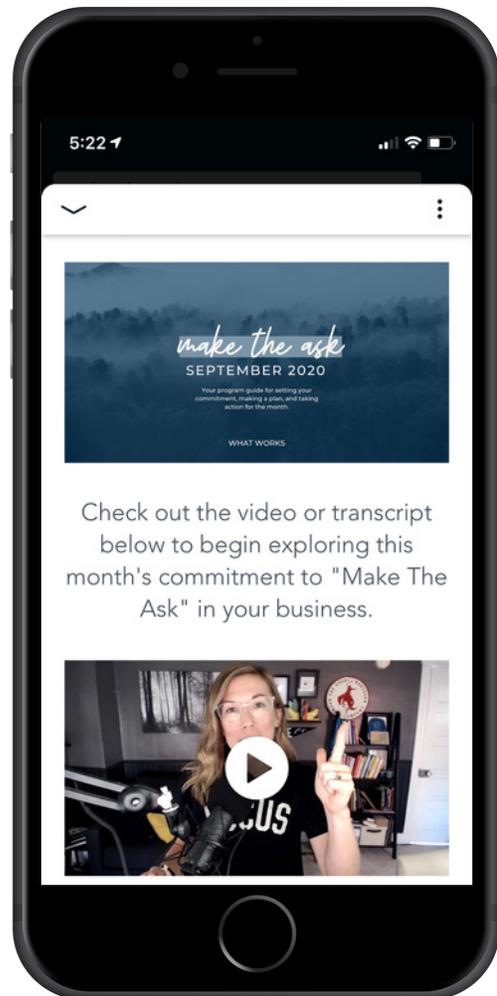
Need help reworking a process or rebuilding a component of your business? There's a tool for that!

Crave the camaraderie of people who "get it?" We're there for you!

You'll save time, money, and hassle as you run & grow your business because you'll have one place to go for support, tools, and resources.

The What Works Network is your comprehensive support system for building a more resilient and sustainable business.

[Learn More](#)



THE WHAT WORKS PODCAST

The What Works Podcast is free, in-depth content that takes you behind the scenes to discover how small business owners are building stronger businesses. Each month, we tackle a different topic and explore the unique ways entrepreneurs manage it. Listen on your favorite podcast app!