How to Run an End-of-Year Reflection for Your Organization

Why taking time to reflect on the year is the most powerful thing your team can do right now — and how to do it.

As we approach the end of this year, most of us focus on the next. Companies and non-profits start revving up their strategic planning muscles, eager to say good riddance to the past and move on to the future. Onward and upward, right?

Not so fast. That strategic planning is great, but don't move forward without making time for a critical and often forgotten key to growth: **Reflection.**

Habits of reflection are a big deal. The cost for lost institutional knowledge across the economy is estimated to be well into the billions. Especially for organizations operating in environments of high uncertainty and constant change, reflection is more than just a "nice to have" — it's essential.

Regardless of how last year went, you learned a lot. It would be a big mistake to break for the holidays without having mined this year's successes and challenges for insights you can carry forward. Additionally, wouldn't it be nice if your employees entered the holidays feeling reinvested in your organization's mission, and reminded of their unique contribution — instead of wondering if there might be something greener in that other company's pasture over there? (It's not a coincidence that Google search queries for "new job" spike every January.)

What if the end of this year was a time of gratitude and reflection when you got clearer on how to apply the learnings from this past year to your path forward for next year? What if you discovered the biggest drivers of next year's growth hidden in this past year's challenges? What if we could come together collectively to answer questions like, *What happened this year? Have we, as a team, done everything we set out to do*? and *What did we learn*?

What if we could help our team members answer their own set of questions? Questions like, *Does the work I did here matter? Do I see myself here for another year?*

An End-of-Year Reflection, In Brief

At their core, reflection exercises are about asking four key questions:*

- *What happened?*
- *Why do we think it happened?*
- *What new problems or opportunities did it create?*
- *What might we do as a result?*

A Sample Full-Day Agenda

The following is a sample full-day (9:00 am — 2:30 pm) agenda for a team of four to seven people. A smaller team could choose to shorten some of the timeframes or keep the timing as is to create more space for open dialogue. Much of this work can still be done for bigger teams if you rely on breaking into pairs or fours to share or using conversational structures like 1,2,4, and all. You may even choose to host these conversations in smaller, functional teams first and then gather together to share your insights with the whole team.

Detailed facilitation guide below — note everything in italics is meant to be said. Feel free to modify it to fit your culture, but know I've tried to make it as simple as possible to guide one of these reflections with minimal preparation!

One more note — I'm a big fan of whiteboards and sticky notes. It's a way to visualize and keep track of the group dialogue as it emerges. This agenda requires space for four different board areas and lots of sticky notes.

Preparation Beforehand

Prep the team. Tell them you plan to spend a half-day together to reflect, tell stories and learn from the last year. Let them know it will be an engaging look back at what worked, what didn't, and what you want to do next. Specifically, ask them to come up with their answers to the following prompts:

- *Recall a story of success you were part of this past year — when was a moment you were supremely proud of what you and the team accomplished?*
- *Recall a story of a challenge or failure you want to learn from over this past year. When did something go wrong? When were you disappointed with the outcome of something you attempted?*
- *What other major milestones or moments did you and your team experience this year?*

As a leader, you'll want to reflect back to the beginning of the year and identify the main goals you set out to accomplish as an organization this year. If you have more goals than you do fingers, time to rethink your planning strategy.

PRELUDE: Gratitude

Cultivating presence and focus + pausing to be thankful

[9:00 AM] Take three breaths.

As we get started, we're going to practice something a bit different. We're going to take three collective deep breaths. The intention is to slow down our heart rates, help us focus, and create some space as we get going. I'll start us out.

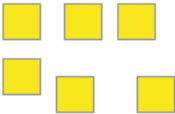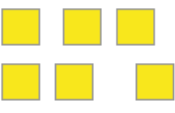**[9:01 AM] Name "Seven Things" you are grateful for about the last year.**
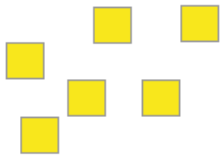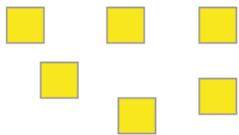
Take three minutes and think back over the next year. Write down seven things you're grateful for from the last year on seven different sticky notes. To help you, there are a few categories on the wall you can use as a starting place. You can be grateful for:

1) **People** — for specific individuals or for our collective identity,

2) **Mission** — for specific aspects of what we're about it and what we're doing,

3) **Accomplishments** — the things we've done as a team or as individuals, and

4) **Insights** — for the lessons you've learned and clarity you've gained.

The more specific, the better. When you're done, please put them on the board.

Now, let's take a few minutes to read over the notes people put on the wall — anything you notice? Anyone can share.

GRATITUDE BOARD

People	Mission
Accomplishments	Insights

ACT I: Observation

What happened?

[9:20 AM] Tell a story of success this year that made you proud.

Now, we're going to review the past year. We'll start by unpacking our own stories. Take two minutes and recall a story of success you were part of this past year — when was a moment you were supremely proud of what you and the team accomplished? As you think through the experience, you can use this framework to help you structure your story:

So we were… [the context]

Then, all of a sudden…[the challenge you faced]

So, we… [what you did to respond to the challenge]

and we… [what happened after that]

As a result of that… [the end result]

Set two minutes on a timer while they reflect on their story.

Now pair up, share your story with a neighbor, and just listen — no questions or comments. We'll take two minutes per person.

Make sure each person has a partner. If there needs to be a group of three, that's fine; just ask them to move more quickly. This works best if you, as a leader, participate as well! Put two minutes on the clock, have the first storyteller begin, then when two minutes are up, holler out, "Switch storytellers!"

*Now, we'll go around the room, and each person will say their favorite thing about their partner's story. **Without retelling their story,** complete one of these following phrases:*

What I noticed was…/What stuck out to me was…/What I loved about that…

Then pretend your partner's story was a movie or a book. What would it be titled?

Ask everyone to write down the titles of their stories on a sticky note and hold on to them — we'll use them later.

[9:40 AM] Tell the story of a failure or challenge you want to learn from.

Now, we're going to tell a story of a challenge or failure we want to learn from. When did something go wrong? When were you disappointed with the outcome of something you attempted? You can use this framework:

So we were… [the context]

Then, all of a sudden…[the challenge you faced]

So, we… [what you did to respond to the challenge]

and we… [what happened after that]

Despite all of that… [the undesired result]

Set two minutes on a timer while they reflect on their story.

Now pair up and share your story with a neighbor and just listen — no questions or comments. We'll take two minutes per person.

Same rules as before.

Ok, let's share again. Remember, **without retelling your partner's story,** *complete one of these following phrases:*

What I noticed was…/What stuck out to me was…

Then pretend your partner's story was a movie or a book. What would it be titled?

Write down the title of the second story on a sticky note. Now you should have two sticky notes.

"MVP Launch—
All Hands On
Deck"

"Adwords
Trainwreck in
Slow Motion"

[10:00 AM] Make a timeline of your stories and other major moments.

Now let's visualize our last year based on our stories of important events and milestones. We'll use the sticky notes with our movie titles first, and then add any additional moments of importance (positive or negative) you think we should capture.

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Here's what to do: Each team member places their sticky note onto the timeline in the month it occurred. The further away the sticky note is from the line, the more positive or negative the moment was.

For example: "hiring an SEO firm" might have been positive but not mind-blowing — so you'd place that above the timeline, but not too far. Whereas, "landing the order for 50k units" changed your year, so we'd place that sticky way up high away from the timeline. The same goes for negative events — if it wasn't that bad, close to the timeline if it rocked your whole foundation, way below the timeline.

Let's do that now.
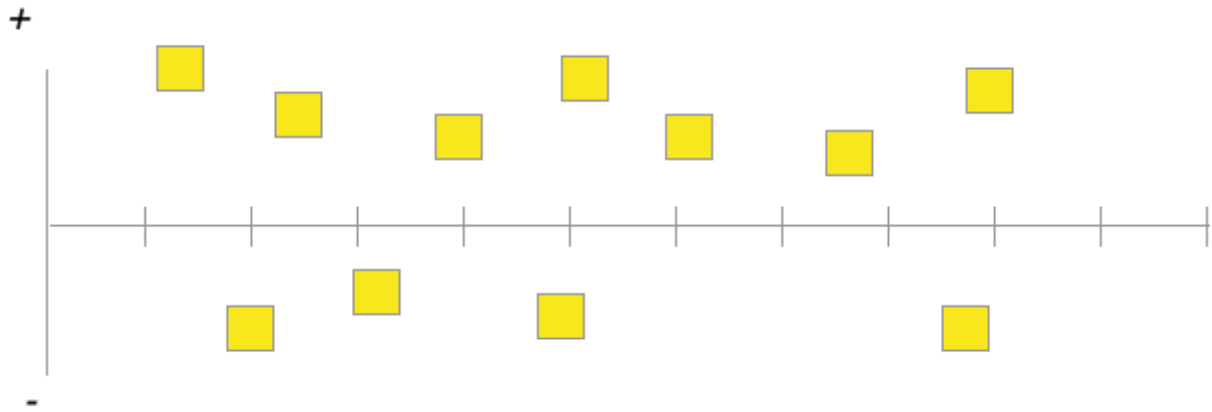
**[10:10 AM] Add in what you had hoped to achieve this past year.**

Now that we've captured our individual reflections on the highs and lows from the past year let's list the goals we set as an organization for 2023 and connect the sticky notes on our timeline to our big objectives.

At the end of the timeline, there's a box for "Goals We Met" (above the timeline) and "Goals We Didn't Meet" (below the timeline). Limit the list to three goals for goals met and goals not met — unless there are major "wins" we didn't set out to accomplish but did anyway. Add them to the "Goals We Met" section.

To be clear — for this conversation, let's try to talk about large, organization-wide goals, not individual ones. We'll get more specific about individual contributions as we move forward.

For example, goals **should** look like this: "*Launch product in 5 new states.*"

Not like: "*Write new copy for a web page on fall promotion.*"
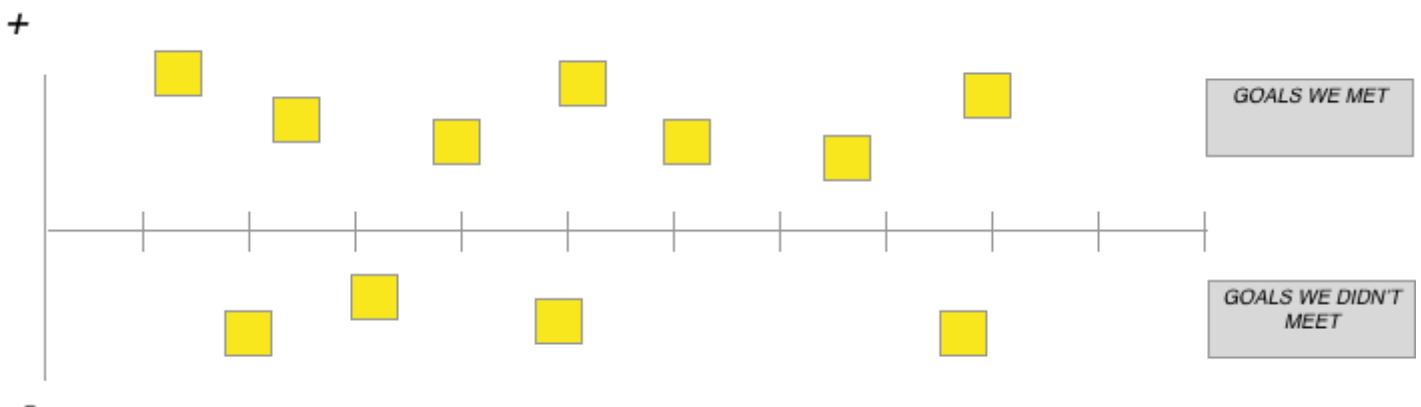
Alright — these events, milestones and goals visualize the last year in our organization. Anything else we should have up here before we move forward?

[10:20] Five-minute break.

ACT 2: Interpretation & Analysis

Why did it happen?

[10:25] Trace a line from each goal back through the moments that led to it.

Now that we've got our 2023 organization-wide goals added to the end of the timeline let's connect each of those goals to the important events and milestones we populated on the timeline. This will help us understand how this year's important moments (positive or negative) contributed to the current status of the priorities we set for 2023.

Would anyone mind volunteering to facilitate our discussion on connecting important events on our timeline to the goals we set for 2023? Here's what it will look like:
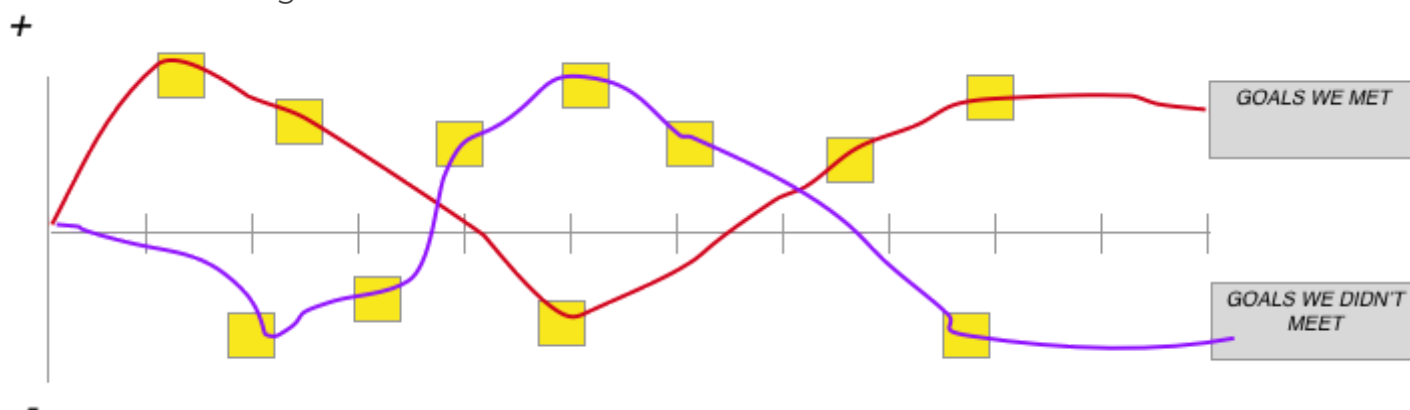
Using a whiteboard marker, connect the journey of each goal on the far right with the events or milestones that led to accomplishing that goal, or missing the mark. Start at the goal on the far right of the timeline and walk backwards through the year, drawing a line to each sticky note that connects to the status of the goal on the right.

When focused on one goal — stick to that goal until you've traced its entire journey, then move to the next goal. It's OK if some sticky notes on the timeline connect to more than one goal. Use a different color marker for each goal's journey across the timeline. If, at any time throughout the exercise you feel like a sticky note should be added to the timeline that represents an important event or milestone that no one mentioned, feel free to add new post-its to get the clearest picture of what contributed to the status of each goal.

Here's what we just did — we now have a clear picture not only of the important moments from last year, but also how those moments connect to our overall goals, and what contributed to the current status of each goal on the right of our timeline — whether the end result is positive or negative. Now, let's get even more specific.

[10:55am] What helped us reach our goals?

Looking through the storylines for each goal, let's spend sometimes reflecting on the three elements that caused the outcomes for each goal. Use these categories to frame the reflection:

1) **Relationships** — Individuals and organizations *outside* of our organization who directly affected the outcome of a goal. Think strategic partners, referrals, clients, vendors, etc.

2) **Behaviors** — Actions or habits that were commonly practiced.

3) **Assumptions** — Beliefs about ourselves, our organization, or the context around us.

To start, identify the first goal we successfully met on our list out there on the far right of the timeline. Now, take two minutes to go back through the major moments that led to this goal being achieved. For each sticky connected to that goal's timeline, write down the people, behaviors, and assumptions present you believe contributed to the goal's success. Keep separate sticky notes for each category — three in total: relationships, behaviors, assumptions.

Now, let's take two minutes to digest and synthesize:

Turn and share your list with a partner, then have them share theirs with you.

As a pair, combine your lists together by creating three new sticky notes for each category that includes the most significant relationships, behaviors, and assumptions. You should now have three new sticky notes as a pair.

Each pair will now share their combined list with the bigger team and paste the sticky notes they created as a pair next to the goal we're currently focusing on.

Do this same process for the remaining goals you were able to achieve.

[11:25am] What caused us to miss our goals?

Let's do the same process for the goals we weren't able to meet. Remember the three categories we're focusing on:

1) **Relationships** — Individuals and organizations *outside* of our organization who directly affected the outcome of a goal. Think strategic partners, referrals, clients, vendors, etc.

2) **Behaviors** — Actions or habits that were commonly practiced.

3) **Assumptions** — Beliefs about ourselves, our organization, or the context around us.

To begin, identify the first goal we weren't able to meet on the far right of the timeline. Now, take two minutes to go back through the major moments that led to this goal not being achieved. For each sticky connected to that goal's timeline, write down the people, behaviors, and assumptions present you believe contributed to not achieving this goal. Keep separate sticky notes for each category — three in total: relationships, behaviors, assumptions.

Now, let's take two minutes to digest and synthesize:

Turn and share your list with a partner, then have them share theirs with you.

As a pair, combine your lists by creating three new sticky notes for each category, including the most significant relationships, behaviors, and assumptions. You should now have three new sticky notes as a pair.

Each pair will now share their combined list with the bigger team and paste the sticky notes they created as a pair next to the goal we're currently discussing.

Good work — now we're clear on the important events and milestones from last year, how they connect to each of our goals for 2023, and what relationships, behaviors, and assumptions contributed either to meeting a goal or missing the mark.

Let's now take all this knowledge and move one level deeper by clarifying how this year's experiences have shaped our current reality.

[11:55 AM] Lunch break.

ACT 3: Implications

What new problems or opportunities do all of these insights from 2023 create?

[1:00 PM] Examine Our New Reality

Now that we understand what happened last year and what might have created those results, let's examine the new reality in front of us. Using sticky notes, take three minutes to write down what's true for each of these five categories.

Assets — What do we have now that we didn't have before? (people, resources, knowledge, opportunities)

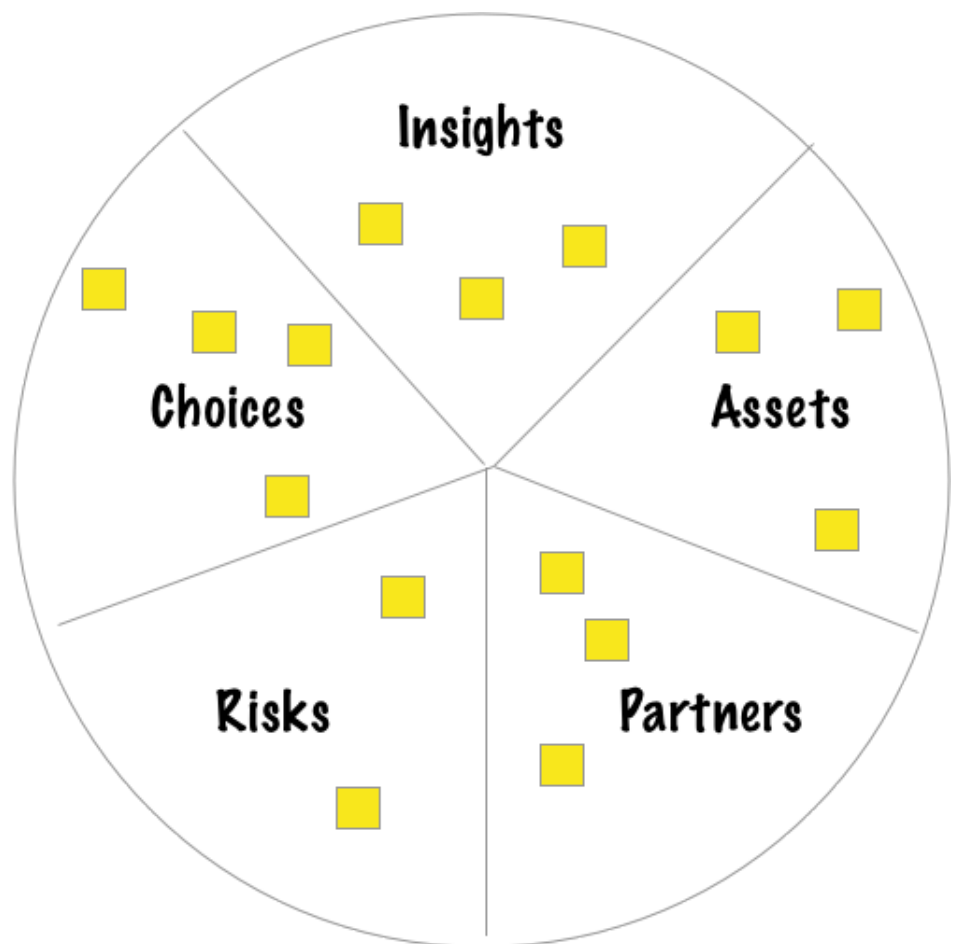**Risks** — What have we lost? What can we still afford to lose?

Insights — What are the surprises or disappointments telling us?

Partners — Who has opted-in or is self-selecting into our mission?

Choices — What actions are within our locus of control? What choices do we have available to us?

The New Reality

Insights · Assets · Choices · Risks · Partners

Now, take three minutes and review what others have added.

This awareness will be crucial as we pull our personal stories, organizational goals, the outcomes of those goals, and the new world those events created as we capture the wisdom from 2023 and develop a plan for how we want to work together in the new year.

ACT 4: Application & Implementation

What's next?

2023 was full of all kinds of important moments, shifts, learnings, and developments. Now that we've mapped the journey that got us here and has a clearer understanding of our present reality, let's collectively decide how we'd like to work together in 2020.

[1:30 PM] Capture Lessons Learned & Lessons We Want to Learn

We're going to create a little space for an open dialogue. Let's talk together about lessons we've learned over the last year and capture lessons we still want to learn.

Take two minutes to get up and walk around the room. Look at all the things we've captured today — what we're grateful for, stories of important events and moments, the path to achieving or not achieving our goals, and the new reality for our organization. After reviewing our work today, write down the lessons you learned individually or the lessons we learned as an organization on sticky notes. Place them in the "Lessons Learned" box.

Now, take a moment to think about the lessons we still need to learn. What puzzles do we still need to solve? What questions do we still need to answer that would be game-changing for 2020? After taking a moment to reflect, write down the lessons we still need to learn. Place them in the "Lessons We Want To Learn" box.

Lesssons Learned	Lesssons We Want to Learn

Good work. Now we've added a layer of depth to our reflection today. We now know what we've learned this year and what we still need to figure out to improve. Let's now translate our learnings into actions.

[1:50 PM] A Start, Stop, Keep, Restart Board.

Finally, what does that mean concretely for our habits, focus, and behavior? By yourself, write down 3–4 things you believe the team should either start, stop, keep, or restart doing next year. After two minutes, turn and discuss your lists with a partner. Work together to combine your lists into one — trying to keep the total number to under 6 things. Finally, share your lists as a team and create a final team list of agreed-upon start, stop, restart, and keep doing items.

Keep	Start	Restart	Stop

Now, let's go one by one with each item and assign who is responsible for that task moving forward.

[2:15 PM] Reflect on what just happened.

Wow. We just accomplished a lot. What cool and surprising insights. Let's talk about what just happened.

In a circle, let's go one-by-one answering the following mad-lib:

"I saw/heard…" *[Things you saw or heard happening]*

[Answer as a group]

"That made me think/feel/wonder…" *[Reactions these observations caused in you]*

[Answer as a group]

"Now, I want to…" *[Actions you now want to take]*

[Answer as a group]

[2:30 PM] The end.

Conclusion

Habits of reflection matter. By taking a step back and cultivating a practice of making sense of the past year, you remind yourself and your team why your work matters and how you can continuously learn from it. Let us know if you plan to use this, how you evolve it, and what you learn.

Want to talk through how to run this with your team? Email charlotte@charlotteejderberg.com