

Tara Claeys 2020 Annual Review Template

What went well?

Write down 5–10 specific successes or events you'd like to celebrate from the past year. These can be related to anything you want: personal growth, career progression, learning, health, side projects or hobbies.

Success	Category	Why this matters to me
Engaged in School Marketing Community	Business Growth	Goal to Become known as a "Go To" resource for small school/camp WORDPRESS websites (to gain new business) I met new colleagues and introduced myself to those who might help me get new business and learned more about school marketing in general. This was part of 2020
Donated services and resources to worthy causes. Created Marketing Committee for ETC. Participated in voter information/registration efforts. Helped Sosna with college and scholarship plans.	Personal and Business Values	Goal: Give back to my communities
Increased running mileage, became more conscious of drinking. Participated in 3 monthly running challenges to run over 100 miles in each month. 975 miles running, 227 runs, 197 hours Added power focus to Peleton/indoor cycling	Health	Being healthy is important to me, being fit is important.
Conducted Enneagram typing with Steve. Improved connection with Steve. Family Zooms.	Relationship	My family is #1 priority

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What didn't go so well?

Now, think about what didn't go so well. These could be growing pains, stumbles, or even just unfortunate trade-offs from shifting priorities.

Disappointments	Category	What went wrong?	How do you feel about it?
Was and felt left out of some groups	Mental Health	Low self-esteem and obsessive concerns about what people think about me	Worry about what others think of me and being left out. I feel like I annoy people - something about me causes people to leave me out and not choose me.
Gained some weight	Health	Didn't pay attention to eating and drinking.	Ok. I feel I am in good shape and can lose 3-5 pounds and feel more comfortable.
Did not get new school client	Business	COVID and I am not a well-known entity in this space.	OK. This year was a building year to get known in the space.
Too much time online and on email	Business/ Life	Continued issue - habit and satisfaction of handling email requests vs. avoiding larger projects	Guilty. I need to be more disciplined about screentime and find other hobbies and interests that are not in front of screens.
Big Dogfish Coupon Blunder	Business	I didn't test and check. Put too much trust in Lauren.	I am over it now, but it was awful!

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What did you learn?

Looking through the above sections, you'll probably see some common threads you can pull on. Try to write at least 5 lessons you've learned over the past year, each with a short description, context, and how you want to apply it moving forward.

Lesson	Context	What are you going to do with this knowledge?
I have low self-esteem and allow my negative thoughts to spiral out of control		Practice self-love and journaling. Make conscious effort to accept myself as I am and not focus on what others think of me.
I am more comfortable when I am around 125 pounds		Do what it takes to lose 5 pounds
It takes time to develop authority and following in an industry		Continue to conduct outreach and increase direct marketing efforts to get more clients in portfolio
I spend too much time online and on my phone		Put controls/limits on screentime and pay attention to usage and time online. Start new practices that are not online. Spend more time outside.
I am sometimes not careful and am hasty in tasks. I should invest in outsourcing to experts when a bigger job requires it. I don't have to be an expert in everything, and being cheap has a cost.		Outsource larger projects. Allot time to projects to get them done carefully. Do a better job of carving out larger chunks of time for focused work.

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What is your theme for 2021?

Using the lessons and action plans you just wrote down it's time to look to the future and set some high-level expectations of what you'd like to achieve in 2021.

Purpose:

*This year, my main focus will be on **acceptance and self-esteem**.*

Outcomes:

At the end of 2021, I will have accomplished:

- 1. Better self-esteem and comfort with who I am and my social circles*
- 2. Business growth in niche (new client(s))*
- 3. More awareness of and limits on screentime*

Theme:

*2021 is the year of **acceptance and positivity**.*