# Annual Performance Review Template

How to Use This Template

At the end of every month, block out at least one hour and go through this process. Doing so will help you do a lot more of what actually matters and accomplish your bigger goals in life.

Step 1: Add up the numbers (time: 20-30 minutes)

*“It is a capital mistake to theorize before one has data.” – Arthur Conan Doyle*

Before you start drawing conclusions, it’s important to pull any data you might have been collecting along the way. If you use tracking tools of any sort, spend time at the end of every month analyzing the numbers.

* [FitBit](http://www.amazon.com/gp/product/B00BGO0Q9O/ref%3Das_li_tl?ie=UTF8&camp=1789&creative=9325&creativeASIN=B00BGO0Q9O&linkCode=as2&tag=aliimabysuzpr-20&linkId=G3NAGNKNSENBHVVC" \t "_blank) (daily steps and mileage): How many steps/miles did you walk this month?
* [Strava](https://www.strava.com/%22%20%5Ct%20%22_blank) (running and bicycling mileage): How many miles did you run this month?
* [Toggl](https://www.toggl.com/app/timer%22%20%5Ct%20%22_blank) (work hours): How many hours did you work this month?
* [MileIq](https://www.mileiq.com/%22%20%5Ct%20%22_blank) (driving mileage): How many miles did you drive this month?
* [QuickBooks](http://quickbooks.intuit.com/%22%20%5Ct%20%22_blank) + [Excel spreadsheets](https://office.live.com/start/Excel.aspx?ui=en-US" \t "_blank) (financials): What was your net income for the month?

Step 2: Reflect on victories (time: 5-10 minutes)

*“Self-acknowledgment and appreciation are what give you the insights and awareness to move forward toward higher goals and accomplishments.” – Jack Canfield*

Write down everything from the past month that you’re proud of. Big or small, anything goes. Aim for at least 5 big accomplishments, but list as many as you can come up with.

Step 3: Write down any major lessons learned (time: 5-10 minutes)

*“*[*If you're not making mistakes, then you're not doing anything”.*](http://www.brainyquote.com/quotes/quotes/j/johnwooden386958.html?src=t_mistakes) *-* [*John Wooden*](http://www.brainyquote.com/quotes/authors/j/john_wooden.html)

Just as you should acknowledge success, it’s important to reflect on mistakes. What were some major lessons learned this month? Any sources of inspiration or ideas to tackle going forward? Write them down.

Step 4: Analyze what didn’t happen (time: 5-10 minutes)

*“*[*Do the one thing you think you cannot do. Fail at it. Try again. Do better the second time.*](http://www.brainyquote.com/quotes/quotes/o/oprahwinfr402113.html?src=t_fail)*”*

*-* [*Oprah Winfrey*](http://www.brainyquote.com/quotes/authors/o/oprah_winfrey.html)

If you set any goals previously, take a moment to reflect on them. Are you on track to meeting these goals? If not, spell out what went wrong and how you’re working on the solution.

Step 5: Clarify new goals and commit to them (time: 5-10 minutes)

*“*[*A man without a goal is like a ship without a rudder.*](http://www.brainyquote.com/quotes/quotes/t/thomascarl156155.html?src=t_goal)*” -* [*Thomas Carlyle*](http://www.brainyquote.com/quotes/authors/t/thomas_carlyle.html)

Go over your values and big picture dreams and decide on 5-10 actionable goals that you want to focus on. These can be short-term monthly goals, or bigger goals you want to focus on throughout the year. At this moment, don’t worry about the minutiae of how you’ll achieve the goals. Instead, focus on the big outcomes of each goal and how those outcomes will impact you.

Step 6: Clarify new goals and commit to them (time: 10-20 minutes)

*“*[*A dream becomes a goal when action is taken toward its achievement.*](http://www.brainyquote.com/quotes/quotes/b/bobennett167540.html?src=t_goal)*” -* [*Bo Bennett*](http://www.brainyquote.com/quotes/authors/b/bo_bennett.html)

Now is the moment of truth! Review each goal you listed above and start breaking them down into smaller tasks you can gradually work towards. Be realistic, and be sure to include projected timelines and due dates to hold yourself really accountable.

# Important Things to Remember

1. Everything takes time.

While it’s important to set deadlines and timelines, it’s also crucial to remember that sometimes life happens and things take longer than expected. That’s ok, but be sure to update your goal sheet and calendars to keep up with deadline changes.

1. Schedule your most important tasks early.

The more important the goal or task, the earlier it should appear on your calendar and to-do list. Get these things done as early in the day and early in the week as possible.

1. Acknowledge that sometimes you just can’t do it all.

Even the loftiest planners can’t always fit everything in at once. If you don’t meet your goals for the month/week/year, don’t give up on them, but do consider breaking down that goal into something more bite-sized and manageable.

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Thanks so much for being a part of this!