

# FINISH WELL & CREATE SUCCESS IN THE NEW YEAR

Insights from the Experts

*By Jalene Case, Dr. Francis Eberle, Davina Ware & Ryan Lisk*





# JALENE CASE

Leadership Coach & Consultant

Customize your preparation for the coming year based on your vision for **what you want to do** and **who you want to be**.

Staying on track can be a challenge if you tend to be distracted by shiny new ideas, like I am. To lead yourself toward what you want, you need a **strong support and accountability system**.

## JALENE'S NEW YEAR PLAN:

- 1 Update your values.
- 2 Reconnect with your "Why" Statement.

### 3 Design the next 5 years, based on 8 areas:

Business  
Self-Care

Learning & Growing  
Household

Travel  
Friends & Family

Financial  
Spiritual

- 4 Create a vision board.
- 5 Build your support system of people and processes.  
*(For example: a professional coach for continued growth, a peer coach for habit changes and accountability partners for goal achievement).*
- 6 Put everything from above in a spot that you'll see often.






Leadership & Organizational Advisor  
**DR. FRANCIS EBERLE**

There are 4 steps that I find helpful as I close out one year and prepare for another. They are **Review**, **Clean**, **Plan** and **Check In**.

The **Review** process involves assessing what worked and what didn't—and then celebrating what did. This can also be done right after the activity instead of waiting until the end of the year. This learning opportunity helps you write better goals, both stretch and realistic goals for the next year.

**Cleaning** is also a type of review, but more about acknowledging that you have grown and changed. Now you may do things differently. Go through your files, digital and paper, reflecting and tossing. It can be helpful to start the new year with a clean slate.

Third is **Planning**. Start with one big idea (such as listening better) then narrow it down to 3 or 4 general themes (such as expanding your network) and incorporate how the themes will advance your idea. Write 1 to 3 goals for each theme and action-orientated steps for each goal.

A person's hands are shown writing in a notebook with a pen. The notebook is open to a page with the word "MAY" visible. The person is wearing a white shirt. The background is a wooden desk with a laptop and some papers.

Finally, make sure to **Check In**. Look at your progress quarterly to determine how you are doing and whether adjustments are necessary.

Executive Coach

# RYAN LISK



**First, look at the numbers.** Several numbers keep me focused on doing the right things, but the first number is revenue. I think about a quote I first heard from Ron Price, "**Revenue is vanity; profit is sanity.**"

Revenue by itself means nothing, which is why you have to monitor your costs/expenses and margin. In addition to revenue, there are a handful of other numbers/metrics to review on a regular basis, such as assessment reports, invoicing/accounts receivable and expenses.

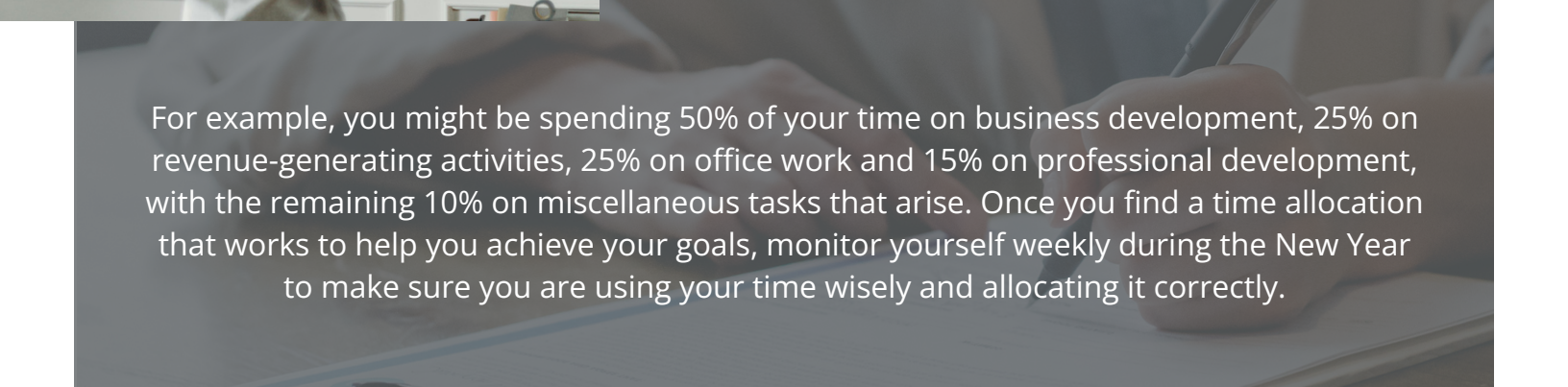


**Second, look at your profit centers** for the year. Consider what clients are willing to pay for.

Review and preview what services worked well and which did not. Look at potential trends for the next year that your clients are interested in and how they tie into the profit centers.

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**Finally, look at where your time is being invested.** Tools such as a key results sheet can show you where you should be investing your time, and what that time breakdown should look like.



For example, you might be spending 50% of your time on business development, 25% on revenue-generating activities, 25% on office work and 15% on professional development, with the remaining 10% on miscellaneous tasks that arise. Once you find a time allocation that works to help you achieve your goals, monitor yourself weekly during the New Year to make sure you are using your time wisely and allocating it correctly.



# DAVINA WARE

Workplace Strategist & Career Coach



I think it's important to go with **the momentum of the season**. At the end of the year, we tend to hibernate and wind down. I focus on closing loops on current projects and going back to complete the projects that I didn't finish.

- 1 Then I **welcome rest** for my mind, body, and soul while reflecting on the success and opportunities for improvement.
- 2 As the new year starts, I strategize the best way to **expend my resources** and renew my commitment to the people I am called to serve.
- 3 I keep abreast of the emerging trends in technology, industry and consumer temperament to ensure that I am **aware of the heart and motivation** of my consumers.




Consider these insights and incorporate them into your own plan as you finish the year and begin strategizing for the next. We hope you see success in the New Year!




**Want to talk to someone about your plan?  
Contact us to get connected with one of our expert coaches.**



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