

## Ep #218: 6 Questions to Ask in Your Year-End Review



### Full Episode Transcript

With Your Host

**Lindsay Dotzlaf**

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Hey, this is Lindsay Dotzlaf and you are listening to Mastering Coaching Skills episode 218.

To really compete in the coaching industry, you have to be great at coaching. That's why every week, I will be answering your questions, sharing my stories, and offering tips and advice so you can be the best at what you do. Let's get to work.

Hey coach, I'm so happy you're here today. And if you're listening in real time, happy New Year. Or happy New Year's Eve, I guess I should say. This will be coming out, this episode is coming out on December 31st of 2024. So if you're listening on that day, happy almost New Year. If you're listening in the future, that's okay because what I'm going to talk about today is a great exercise, short and quick, that I'm going to go through that you can do at the end of the year, but you can also do this literally anytime.

I'm not big into setting new year's resolutions. I may have talked about this on the podcast before, but it always just seems so arbitrary to me. I do love to think about maybe a theme or intention for the next year, which since I'm recording this podcast a little early, I haven't quite done that yet, but I'm sure I'll be back with an update on that later.

But I am, especially in my business, into kind of evaluating, you guys know if you've listened to my podcast how much I love evaluations, but just kind of taking an overall look of the last year. And I'm going to teach you how to do that today and kind of some of the questions that I ask myself. And this can be done in as little or as much time as you want it to be. But the importance of it is that you really take a moment to celebrate and evaluate your business over the last year.

And of course, again, if you're listening in the future or any other day of the year, you can use all these questions I'm about to ask. You can use them at the end of the year and evaluate the whole year. You can evaluate the last six months. You can think about the last two weeks. You can ask yourself these questions literally anytime. I just thought today, since it is the very end of the year, is a perfect day to just recap. How did your year go? How

## Ep #218: 6 Questions to Ask in Your Year-End Review

are you feeling about it? And maybe take a couple notes of how you want it to look differently next year.

So first, why do we celebrate? Why is that important? I think it's really important that you do that before you even get into an evaluation because, especially if you've had maybe a tough year or things didn't go quite as planned or you didn't hit your goals or whatever, especially then because you may not have taken a lot of time to celebrate.

If that's the case, it's really important that you take a moment and just show yourself all the things that went great this year, whether those are personal or in your business, in your coaching, just all around to really help rewire your brain to learn to focus when things are going well. Like focus on those things and to take note of them and not just rush past them and brush them off because you didn't hit all of maybe the bigger goals, right?

And even if you did, let's say you did hit all your goals and you just feel on top of the world. It is really important still to take a moment to thank yourself, to give yourself gratitude for the year that you had, right? And be specific about what you want to celebrate, because probably not every year will feel the exact same. So if you're in that place, amazing. I'm so happy for you. We're all so happy for you.

And if you're not, that's okay too. I totally feel you. Some years feel kind of easy and like they blow by and things go great. And some years just feel a little bit more like you're slodging through the muck. So whichever year you're in, that's okay. We're still going to celebrate. Make sure to thank yourself, tell yourself congratulations on just all the things that went well, right?

Tell yourself that you're proud of you, that you are grateful for all the decisions you made, whatever it is that feels great to you. All right? And then after you do that, what I love to do at the end of every year, this can be like a journaling exercise or pull up your notes on your phone or on your computer or whatever, and just take a moment to evaluate some of the major things and themes of this past year in your coaching practice.

## Ep #218: 6 Questions to Ask in Your Year-End Review

I'm going to give you some questions that I like to ask myself, but you can add to these as well, right? You can make a list of what I'm about to say, and I'll give you some examples of some answers, but you can add to these. And maybe just keep them somewhere so that you can come back and visit them each year. Or just come back to this podcast, just go ahead and bookmark it now so that you have it. And then just come back to the podcast and re-listen each year.

So here we go. And this is going to be a little different than my typical evaluation, right? Because I've taught that on the podcast before, where you just kind of asked what worked, what didn't work, what would you do differently? This is going to be, the questions will be a little bit different than that.

So this is like, think about the whole last year, and I want you to consider and maybe jot down what were your main focuses this year? So that could be many things, right? Like what were the main things that you spent your time doing? Not that you said you were going to spend your time doing, but that you actually spent your time doing.

So maybe you focused a lot on client delivery this year. Or maybe you really tried to increase your sales and your revenue in your business. Or maybe you spent a lot of time figuring out ads or Facebook or YouTube or Google ads, or maybe you traveled a lot. Maybe you spoke on a lot of stages and you spent a lot of time preparing for that. So just whatever it was, just kind of mark those down.

What were your main focuses? What did you spend most of your time doing on purpose outside of just coaching your clients or sending your Tuesday email. Like outside of your regular things, what were you focused on maybe improving or learning or changing in some way?

And then ask yourself, which parts did you – Not of that, but just of your whole coaching practice, which parts did you love last year? What were your absolute favorite parts? Write down anything that comes up for you. Maybe you felt really connected to your clients this year. Maybe you had a

## Ep #218: 6 Questions to Ask in Your Year-End Review

lot of fun going live on Instagram every day, every week, whatever. Every day, if you're going live on Instagram every day, congratulations. I will never be in that club.

Maybe you traveled a bunch and you love that that's part of what you get to do, right? Whatever it was, maybe you worked less and you spent more time with your family or friends, or took care of someone in your family, took care of someone in your house, whatever it is. Maybe you spent more time focused on yourself this year.

Whatever the parts were that you loved, right? That really lit you up. Not that you think are supposed to light you up, but that really lit you up. This is going to be important when you look back and remind yourself of this at the end of next year so you can say like, did I do more of those things?

The next question is what worked really well? What maybe did you do this year, what was part of your strategy in your business, in your coaching practice that worked really well? And once you have those things down, make a note of what you want to keep doing. That's the point of making note of what worked really well, right? So that you can go back and look at it and if a couple months from now things aren't going well or something has gone awry, you can come back and, oh yeah, these are the things that are working. Am I doing all of these things?

And they might not all be actions. They might be new beliefs that you've created. They might be new people that you hired in your business. They might be just anything from the last year that you want to make note of that really was like your winning strategy. That could be even like your clients, right? It could be that your clients got amazing results.

The next question, what did not work? So like the opposite, right? What are some of the things that you did spend time on this year? You don't have to list them all. This doesn't need to be a huge list that you're going to judge yourself by. So like the main things that you spent your time on, is there anything that didn't really work and that maybe you want to stop doing next year, right?

## Ep #218: 6 Questions to Ask in Your Year-End Review

Maybe you dove into ads for the first time and you're like, we only wasted money. Like we never made money on them, I don't know how to do them. So maybe you either need a new strategy or it's time to take a break doing them, right? That's like a really generic example. Maybe you hosted your first live retreat and you just decided, you know what? That's really not for me. It's not my favorite thing.

So they might not all necessarily be things that you want to stop doing, but could also be things that you know you need to change, right? Maybe you did them or beliefs that you had all year or things you got distracted by or anything that just really didn't work that you either want to make a change or you want to stop doing altogether. Just make note of those.

I think it's important to say that when I'm doing this, at this point I'm not making any decisions. I'm just making a note, right? These things didn't work. So that I can come back later when I am making my decisions and really take a good look at this and remind myself of what's not working and how I need to plan for that.

Now let's think about next year. What do you want next year? I know it's such a simple question, but what do you want your business to look like? What do you want your practice to look like? How do you want to work with your clients? And this could be goals, right? Like when you answer, what do you want for next year, this could be goals. It could be like a revenue goal. But it could also be, I want to feel more grounded, right? It could be a feeling. It could be, maybe you want more time off, right?

Anything that comes up for you when you ask yourself, what do you want for next year? And this is a similar question, but just phrased a little differently, what do you want more of, right? So maybe you had some of it this last year, whatever it is. What do you want more of?

One thing I thought of when I asked myself this is I want more physical activity throughout my days, right? So I'm looking at solutions for that right now. It might be something like that. It could also be, I want more clients. I

## Ep #218: 6 Questions to Ask in Your Year-End Review

want to have a bigger impact. I want more, fill in the blank. Anything that comes up for you.

Another question, again similar but just a tad different. What will you add? Is there anything that you know you want to add this year? That could be a new offer. It could be a change in your offer, right? Maybe you're adding a group coaching program. Maybe you want to start a podcast next year. Maybe you want to write a book. Maybe you want to add some contract coaches who help you because you're full and you need help in your business. Maybe you know you need to hire, right? This could be anything.

What do you want your main focuses to be in the next year of your business? Now, this might be, like look over some of those things you just answered and your answers might be in there, right? Did you see any themes? Because I asked kind of a similar question in different ways, so it could be that there are themes that pop out when you look through your answers and determine your focus.

Maybe you realize I killed it this year. I love all the results I created and also I'm exhausted. Maybe my focus for this year is learning how to build in more rest, right? Maybe your focus for this year is learning to be better at sales. Maybe it's learning to be a better coach. Maybe as you look back, you're like, okay, I sold a bunch of coaching. I feel great about my business, but I do have some confidence issues when it comes to the way I show up for my clients, right?

Anything you see there, any themes in all of your answers, just take note of them. Maybe add them to your focus for next year. And I wouldn't have maybe more than like three to start when you think of like main focuses. When you answer that question, you don't want it to be like, well, sales and marketing and the back end of my business and hiring and putting together new offers and learning to be a better coach. Like you don't want to just list out every single thing.

It doesn't mean that you're not going to work a little bit probably on each of those things, just naturally as you're moving forward in your business. This

## Ep #218: 6 Questions to Ask in Your Year-End Review

is just something that's going to give you a focus so that when you come back and look at this list, you're like, oh yeah, this is the year I said I was going to do XYZ, whatever that is.

Okay, I hope this was helpful. I hope you had the best year ever and you have so many things to celebrate and I cannot wait to come back and talk to you next year in 2025. I will see you next year.

And don't forget, if you look at your list and you came up with some things, you see some maybe projects on your list that you want to get started in the new year, don't forget that we are currently enrolling for The Coach Project, which is three months of you completing a project of your choice. I have been doing lots of interviews about that, so go back and listen to some of those if you think you might be interested.

And next week, you will also be hearing me break down, like really talk through what it takes to complete a project, how you decide on your project, all of those things that will be useful for you. Whether you join us in the room or not, it will be useful for just all the things that you're working on.

So again, happy New Year and I will see you again next time. Goodbye.

Thanks for listening to this episode of *Mastering Coaching Skills*. If you want to learn more about my work, come visit me at [lindsaydotzlafoaching.com](http://lindsaydotzlafoaching.com). That's Lindsay with an A, D-O-T-Z-L-A-F.com. See you next week.