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# Focus

A Newsletter published for clients and friends of Wagner Consulting Group

## Year End Review

***Make the same mistake repeatedly, and expect a different outcome.*** That's one definition of insanity. Unfortunately, it's easy to qualify for membership in the insanity club if you don't systematically analyze the reasons for outcomes – good and bad. Moreover, you can miss opportunities. A year-end review compares what actually happened with the original plan and helps to identify areas for correction. More important, identifying and concentrating on areas of strength can improve competitiveness.

Multiple viewpoints are valuable, so involve the organization's "key players" in the year-end review. Begin by asking each participant to list the most noteworthy event for each of the twelve months of the past year. In this regard, "noteworthy" may be a major accomplishment or a disappointing setback. Then discuss these lists as a group and write down lessons learned.

After recording the past year's highlights and low points, begin choosing a few areas for emphasis in the coming year and review results in the following three categories.

### Budgeting and planning

- Were there deficiencies in the original plans?
- Were new initiatives well defined and laid out from the beginning?
- Was there good communication among all involved parties?
- In retrospect, what planning elements were missing or inadequate?

### Operations management

- How well were surprises, problems, and changes handled?
- Was important communication handled clearly, promptly, and honestly?
- How well documented were decisions and communications?

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### Quality assurance

- Were productivity measurements timely and accurate?
- Were support groups (accounting, H/R, etc.) effectively involved?
- Did customer satisfaction meet your standards?

Distill all the facts and discussions into a few key lessons that emphasize building on strengths. Although correcting glaring weaknesses is necessary, any person or organization has more upside potential in their key strength areas. Pinpoint specific actions that can be carried out and measured, avoiding generalities like "improve communications."

Finally, document specific recommendations and identify a champion to be responsible for ensuring that each is carried out. Set appropriate dates for follow up, and look forward to a great 2007.

*Tom Wagner*

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do more of what they really love, and  
be more effective at work.

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