

Annual Reflection and Planning Journal

A free tool for subscribers of Being in Community (beingincommunity.com)

How to use the Annual Reflection and Planning Journal

1. Print out the Annual Reflection and Planning printable.
2. Find a journal or notebook to write down your reflections, ideas and goals. You can also type out your answers or use a note-taker on your device. I find writing longhand in a journal helps prevent distractions. Any notebook, journal, or blank planner pages should work. I'm currently using the [Action Journal](#). Use whatever will inspire you, something that you can look forward to writing in and reviewing later.
3. Set aside some quiet time to think about the questions in the printable and start writing down your reflections, ideas and goals. I suggest at least two hours. You could also divide the exercise into two sessions – one session for reflection on the past year, one session for looking ahead to next year. I would give each exercise one hour.
4. The first step is to map out the different roles you have in life. These are all the different hats you wear. For example, in my case, my roles are wife, mother, sister and friend, church servant, writer, teacher, and consultant.
5. Then, for each question, consider the answer according to each role you play. Not every role will have an answer in every question, and some might have more than others.
6. Some answers might repeat or overlap. It's ok. Different aspects of our lives cannot often be strictly categorized. **The purpose of this exercise is to reflect and plan in a way that works for you.**
7. Once you have completed the reflection process, **put your newfound learning, plans, and goals into action.** Write your list of goals on the first page of your new planner, or on a piece of paper you can hang up and look at every day. Schedule the activities you want to do into your calendar.



Here are some recommended books and apps for achieving your goals (some of the below links are affiliate links):

Books:

[Your Best Year Ever: A 5-Step Plan for Achieving Your Most Important Goals](#) by Michael Hyatt

[I Know How She Does It: How Successful Women Make the Most of Their Time](#) by Laura Vanderkam

[Better Than Before: What I Learned About Making and Breaking Habits](#) by Gretchen Rubin

[Time Management Mama: Making Use of the Margins to Pursue Your Passions](#) by Sarah Korhnak and Beth Anne Schwamberger

Apps: [ToDoist](#) (for organizing projects and tasks) and [Pocket](#) (for saving those intriguing articles to read later).

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Reflecting on the past year

"By three methods we may learn wisdom: First, by reflection, which is noblest; second, by imitation, which is the easiest; and third by experience, which is the bitterest." - Confucius

What are the roles I've played this past year?

Consider family roles, community roles, work roles. Remember to consider all the questions below in light of these different roles.

What am I most thankful for this year?

Don't hold back – write down everything you are thankful for.

What was my most enjoyable/pleasurable time last year?

Consider experiences you've had the past year; a vacation, a memorable date night, the party you had after finishing a race – any experience that made you feel happy.

What are my major accomplishments this year?

Remember to consider all your roles. Not every accomplishment needs to be work or business related.

How did I accomplish them?

Be specific – you will want to go back to this when you move on to planning.

How did others help me accomplish them?

Accomplishments are rarely accomplished alone!

What did I struggle most with this year?

What has helped me deal with these struggles or overcome my obstacles?

Who has helped me deal with these struggles or overcome my obstacles?

What lessons did I learn last year? How did I learn them?

What relationships have I started or strengthened this year?

What relationships need more work?

What books, articles, webinars, podcasts, sermons, lectures, conversations, and/or conferences have I read, heard, or participated in this past year that have affected me, changed my attitudes and behaviors? *There is no need to do any research. These should come to mind right away if they were impactful.*

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Planning for the New Year

“Intentional relationships make us more productive, creative, and useful than we could ever be on our own.” –Michael Hyatt, *Your Best Year Ever: A Five-Step Plan for Achieving Your Most Important Goals*

What are the roles will I play this upcoming year?

Remember to consider all the questions below in light of these different roles.

What are my big ideas, goals, and dreams?

Don't hold back. Write down everything you want to do, even if it seems unrealistic at the moment. We will get real in the next few questions.

Which of these ideas, goals, or dreams do I want to start and/or accomplish this year?

This is where we get a little bit more realistic.

What is the community that I will work with to help me accomplish these ideas, goals, and dreams? *Consider all the relationships and groups that will help you on this path. These are people that could be part of your team, who might provide support, hold you accountable, share resources, help with child care, etc.*

What do I want to learn this year? How do I want to learn it?

Consider linking this to some of the goals mentioned above. Learning can take any form – mentorships, reading, online courses, webinars, conferences, support groups, apprenticeships, apps, classes.

What relationships do I want to strengthen/nurture this year? How will I do this?

Remember to consider all your roles here. Work relationships need to be nurtured in addition to personal relationships.

What habits do I want to build and/or maintain this year?

How am I going to build them? Who will help hold me accountable to those habits?

What obstacles do I foresee in the path of achieving my goals and/or building my habits? What will help me overcome them?

What do I want to stop doing this year?

What enjoyable experiences do I want to plan for/look forward to this year?

What word(s), quote, verse, or value would you name for this year?

Many productivity coaches like to choose a word (or a few words) to help them focus on during the year. After this goal and reflection exercise, consider such a word, or perhaps an inspirational quote, scriptural verse, or even a role model that would be emblematic of your goals this year. Author [Jennifer Fulwiler](#) has created an [inspirational word generator](#) that you can try out [here](#).