

THE TRAVELLING COACH

ANNUAL RETROSPECTIVE WORKBOOK



WWW.THETRAVELLINGCOACH.COM

CREATING SPACE FOR REFLECTION

This Workbook is designed as an **honest, guided time for reflection** to help you translate the complexity of the last 12 months into clarity for the next 12.

Through thoughtful prompts and simple, reflective exercises, it helps you **understand your patterns**, acknowledge your growth, and set clear intentions that are resilient to life's inevitable challenges. You can use it at the end of the year or any time you feel the need to, like after a major transition.

The workbook is divided into **two parts**. The first invites you to revisit the past year to observe, learn, release, and celebrate. The second turns your attention forward, offering space to imagine, plan, and prepare for a new chapter with clarity and purpose.

A FEW TIPS FOR A SUCCESSFUL RETROSPECTIVE



GET COMFORTABLE.

Make yourself a cup of something soothing, put on your favourite music, and grab a pen. This is a moment of deep care for your soul.



TAKE YOUR TIME.

There is no rush. You can go through the entire journal in one sitting or split it up into multiple sessions. Quality of insight matters more than speed.



BE KIND & OBJECTIVE.

Remember, you did the best you could with what you knew at the time. Treat this reflection like a non-judgmental discovery. Data is data.



BE HONEST.

This journal is for your eyes only, so don't be afraid to be vulnerable. The more honest you are, the more powerful your learning will be.

Close your eyes and take three deep breaths.
Start when you feel ready.

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"LIFE CAN ONLY BE
UNDERSTOOD
BACKWARDS; BUT IT
MUST BE LIVED
FORWARDS."

SØREN KIERKEGAARD

PART

01

THE PAST

OBSERVATION & LEARNING

1. THE YEAR IN A SNAPSHOT

Go through your calendar, photos, journals, and notes. Note down anything that was significant to you - important events, projects (personal/professional), highs, lows, travel, key decisions, or new skills learned.

Month 01

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 02

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 03

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 04

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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1. THE YEAR IN A SNAPSHOT

Month 05

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 06

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 07

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 08

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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1. THE YEAR IN A SNAPSHOT

Month 09

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 10

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 11

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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Month 12

 Moments of Joy & Growth

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 Moments of Challenge & Strain

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2. THE LIFE BALANCE CHECK

Life is made up of interconnected feelings and experiences. Look back at each area, think about any significant events, and rate your overall satisfaction with the area.

1-10 (1 \= not satisfied at all, 10 \= fully satisfied). This score is a gentle measurement of your fulfillment. Write down **why** did you choose this score? (Significant Feelings/Observations)

Mental & Emotional

(Stress levels, emotional balance, inner peace)

- 1 2 3 4 5 6 7 8 9 10

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Health & Energy

(Physical body, sleep, nourishment)

- 1 2 3 4 5 6 7 8 9 10

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Relationships & Support

(Family, friends, key connections)

- 1 2 3 4 5 6 7 8 9 10

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Focus & Inner Clarity

(Decision-making, sense of direction, learning)

- 1 2 3 4 5 6 7 8 9 10

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Career & Meaningful Work

(Satisfaction, impact, finding purpose)

- 1 2 3 4 5 6 7 8 9 10

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Mastery & Learning

(Skills acquired, knowledge gained)

- 1 2 3 4 5 6 7 8 9 10

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Money & Foundation

(Stability, security, relationship with money)

- 1 2 3 4 5 6 7 8 9 10

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Joy & Play

(Hobbies, downtime, fun, simple pleasures)

- 1 2 3 4 5 6 7 8 9 10

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3. CORE ACHIEVEMENTS & LESSONS

"The greatest danger for most of us is not that our aim is too high and we miss it, but that it is too low and we reach it." - Michelangelo



What was this year's **biggest professional accomplishment** that made you feel proud?

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What was this year's **biggest personal accomplishment** that brought you joy?

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What did you **not finish/accomplish** that you had intended to? What feelings came up around this?

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What was the **deepest lesson** you learned this year?

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3. CORE ACHIEVEMENTS & LESSONS



What was the **wisest decision** you made this year?

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What was the **biggest risk** you took this year, and what did it teach you about courage?

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What made **work meaningful** and connected to your purpose this year?

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4. ENERGY FLOWS & FILLS

Energy Management is the new Time Management.

Use this section to understand what nurtured you and what drained your spirit.



Energy Drain

(What consistently depleted your energy and felt heavy?)

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Energy Gain

(What replenished your spirit and filled your tank?)

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 If you felt completely fearless, what meaningful journey would you **start** based on this understanding?

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 If you had complete freedom, what **draining activity** would you lovingly release immediately?

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"I HAVE NOT FAILED.
I'VE JUST FOUND 10,000
WAYS THAT WON'T
WORK."





-THOMAS EDISON

5. FINDING STRENGTH IN THE HARD TIMES

The hardest moments are often our best teachers. List three challenging moments from this year. How did you feel? How did you respond? What did you learn?

 Hard Moment	 Inner Wisdom Gained:
 Feelings & Response:	 Next Time, I'll nurture myself by:

 Hard Moment	 Inner Wisdom Gained:
 Feelings & Response:	 Next Time, I'll nurture myself by:

 Hard Moment	 Inner Wisdom Gained:
 Feelings & Response:	 Next Time, I'll nurture myself by:

6. RELEASE & HOLD CLOSE

Letting Go (Forgiveness & Release)

Reflect on anything from the past year that still needs to be released or forgiven before you can move forward. This frees up mental capacity for the future. Letting go is not a neat or linear process. As you acknowledge what no longer needs to be carried, emotions may surface, even tears. This is completely natural. It's a sign that something inside you is making space for what's next. Allow whatever arises to move through you with gentleness and without judgement. What you release becomes room for new clarity, new energy, and new beginnings.

"You only lose what you cling to." -Buddha



What is something that you **regret**? What does that feeling teach you?

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What still needs to be **forgiven** (in yourself or others) to find peace?

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Write yourself a note to forgive yourself and **let it go**:

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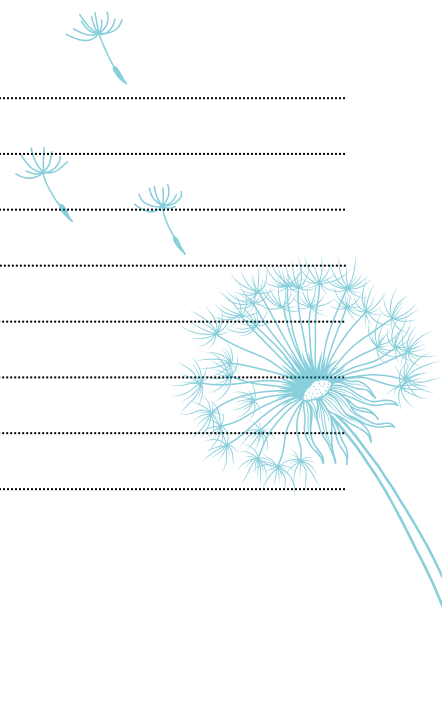
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6. RELEASE & HOLD CLOSE

Keeping (The Wins)

What gentle habit or ritual from this year brought you calm and balance?
What is one thing (a feeling, an insight, a connection) you want to hold close next year?



What was a **pleasurable moment** that will make you smile for a long time?



What gentle habit or ritual from this year brought you **calm and balance**?



What is one thing (a feeling, an insight, a connection) you want to **hold close** next year?


7. WRAP UP

 Pick three words that capture the essence of the past year.

Three empty dashed-line boxes for writing words.

 What is the **single biggest lesson or truth** you want to carry into the new year?

Five horizontal dotted lines for writing the answer.

 Before we say goodbye to the last year, is there anything else you would like to get off your chest?

Five horizontal dotted lines for writing the answer.

**That's it.
You finished the first part. Well done.
Take a few deep breaths.**



PART

02

THE FUTURE

INTENTION & ALIGNMENT

WELCOME TO PART 2

You have successfully completed the rigorous Observation & Learning phase. You possess the data, the insights into where your energy leaked and where your greatest professional impact lies. This second part of the workbook is dedicated to translating that evidence into a resilient, actionable system for the future.

We shift now from analysis to architecture. Every choice you make in this section is a strategic decision designed to ensure your time, effort, and focus are aligned with the highest-leverage outcomes for the next 12 months.

A FEW TIPS FOR SUCCESSFUL PLANNING



LEAD WITH INTEGRITY

You now possess the deepest wisdom available about your own operating system. Set aside external pressures and comparison. Your plan should be built only on the evidence gathered in Part 1. You are the sole expert of your path.



HONOR YOUR ENERGY

Use the results of your Energy Audit as your ultimate guide



ALLOW THE WISH

Embrace the Unforeseen. While structure and goals provide the container, leave room for magic.

Close your eyes and take three deep breaths.
Continue when you feel ready.



“

"THE BEST WAY TO
PREDICT THE FUTURE
IS TO CREATE IT."

- PETER DRUCKER

A person is meditating in a tropical setting. The scene is overlaid with a blue tint. In the foreground, a person is sitting in a meditative pose on a mat. Behind them is a swimming pool, and further back, there are lounge chairs and a thatched-roof structure. The background is filled with dense tropical foliage, including palm trees and various plants.

1. SETTING YOUR INTENTION & GUIDING BELIEFS

Every robust strategy rests on a clearly defined **operating philosophy**. Before setting concrete goals, we must establish the energetic and intellectual framework that will govern your choices. This step ensures that when difficult or ambiguous decisions arise throughout the year, your actions remain consistent with your highest priorities.

Your **Intention** (the Why) focuses on an internal state of being (e.g., to be resilient, calm, impactful). It is the single, overarching emotional or directional compass for the year. Your **Guiding Beliefs** are the deep-seated truths you will operate from. They are the non-negotiable mental rules, the internal standard operating procedures, that will protect your focus and energy.



Your Core Intention

Think about who or how you want to be/become over the next 12 months. This is your north star. Intention:

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3 Guiding Beliefs for the Year Ahead

Based on the wisdom from Part 1, what are 3 gentle but firm rules you will live by, especially when pressure hits? (e.g., "I will always choose peace over perfection," "I will protect the time for my dearest relationships.")

1

2

3



2. GOALS & INTENTIONAL ACTION

Now, based on your Intention and Guiding Beliefs, set your goals. Pick up to three Goals for the coming year. These goals must be more than wishes; they must be positive, measurable statements of your future state.

Goals

- ①
- ②
- ③

Your Stop, Start, Continue Plan (The How)

For each goal, and based on your Part 1 understanding, define your immediate actions, stop-start-continue.



STOP
(What habit or activity must be gently released?)



START
(What new habit or practice must be nurtured?)



CONTINUE
(What successful activity must be given more space?)

①	②	③
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3. SUPPORT SYSTEMS & STRUCTURE

Goals are only as resilient as the system they operate within. This section is a systems audit of your **external environment and internal boundaries**.

If your physical and relational structures do not actively support your **Goals**, those goals will be undermined by friction. Identify the people, the physical structures, and the boundaries (the **NOs**) that you must put in place to protect your focus and energy, guaranteeing your system's long-term effectiveness.



Who can I **lean on** to keep me on track with reaching my goals?

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How can I adapt my environment (home or office) to **nurture** my focus and peace?

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What am I saying **NO** to this year (to protect my energy and inner calm)?

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What am I saying **YES** to this year (to fuel my intention and joy)?

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"ACTION IS THE
FOUNDATIONAL KEY TO
ALL SUCCESS."

- PABLO PICASSO

CONGRATULATIONS

**You've done it.
Take a deep breath and rest.
You have successfully reviewed one year and planned
another. Well done.**

Your clarity is now your most valuable asset. The system is designed,
the goals are anchored, and the flow is protected.

When you are ready, get started on your goals and actions.

Good luck.



PAY IT FORWARD

Share your experience

Your journey matters. Sharing your experience is the kindest way to inspire others who are also seeking clarity and better ways to move through the process.

If you found the workbook helpful, I would be very grateful if you shared your key learning, a favorite prompt, or a powerful new goal on [LinkedIn](#) or [Instagram](#)!

Please **tag me** so we can celebrate your clarity and help others find this process.

Feedback

If this workbook provided significant clarity and value for you, your honest **feedback is deeply appreciated**. Taking 2 minutes to share a brief testimonial helps others trust that this process will work for them, too.

Click here to submit your feedback: <https://tally.so/r/PdR9bd>

*Much love,
Jo*



STAY CONNECTED

Mind the Mess

Your Annual Retrospective creates a powerful wave of momentum. The **Mind the Mess** community is here to help you sustain that wisdom without the pressure of "getting it right". To explore, to grow, and to make room for what matters in life and and work - even when it's a little messy. With your purchase of this workbook, you are automatically a member of the community.

What you get

The community is a space to **exchange experiences, share insights and learn from others.**

Every so often there will be a reflection worth pausing for, a tool worth trying, a question worth asking and maybe even a little magic in the mess.

There is no perfect plan but there are better ways to move through the process.

<https://www.thetravellingcoach.com/community/mind-the-mess>

**YOU DON'T HAVE TO
HAVE IT ALL FIGURED OUT.**

The **Mind the Mess** community.
A place to connect, share, and grow
together, in life and at work.



Sarah "Jo" Will - The Travelling Coach

🌐 <https://www.thetravellingcoach.com>
✉ hello@thetravellingcoach.com

📷 [@jo_thetravellingcoach](https://www.instagram.com/@jo_thetravellingcoach)
🌐 <https://www.linkedin.com/in/jo-sarah-will/>