

The Ultimate Annual Review

2023 Edition

"I don't know where we are going but I know exactly how to get there."

Boyd Varty

Made with ❤️ by Schlaf



👋 Hey there, Steve Schlafman here. I'm a Professional Transition Coach and writer. I help founders, executives and creatives in midlife navigate complex work-life transitions and manifest their next calling. I'm also the creator of Where the Road Bends, a newsletter exploring personal evolutions and transitions.

👉 Interested in deepening your journey? Discover more about my coaching services at schlaf.co. For

regular insights and thought-provoking essays, subscribe to [Where the Road Bends](#). And for occasional musings and updates, follow me on Twitter [@schlaf](#). Let's continue this journey together!

I'm glad you're here

Welcome to the 2023 edition of the Ultimate Annual Review. Whether embarking on this process for the first time or returning for another introspective adventure, I'm thrilled you're here. Your trust and commitment to this process are deeply acknowledged, honored, and respected. I see you.

Now in its sixth year, the Ultimate Annual Review has crossed 25,000 downloads, impacting lives in over 80 countries. This year, while retaining the core structure, I've added new quotes for inspiration and expanded instructions to further guide your experience. I also published a Spotify playlist to be your musical companion as you delve into the depths of your experiences and dreams.

A theme close to my heart this holiday season is "enoughness"—an invitation to embrace ourselves and the present as uniquely perfect and complete. As I considered adding new sections and questions to this process, I realized its current form might already be ideal. What if it perfectly meets our needs? What if it's not lacking anything? How does my impulse to add more features to an already powerful exercise reflect an insecurity?

This leads to an even broader question: what if you, in this moment, are inherently complete and perfect, just as you are?

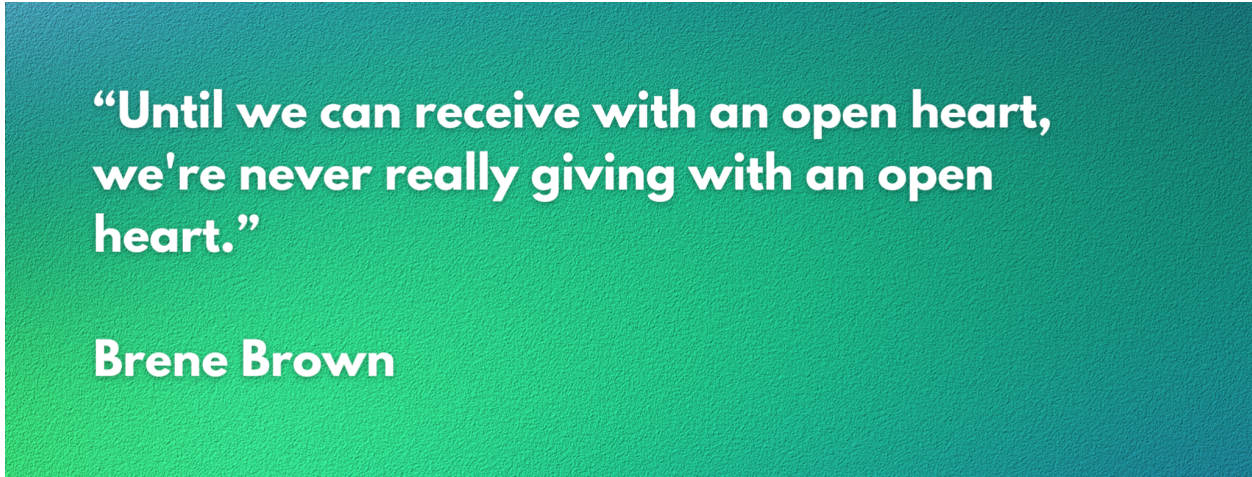
As you reflect on 2023 and envision 2024, I encourage you to savor the unique beauty of your path, including its twists and turns. Recognize that every experience, every choice, every relationship, and every moment has shaped your unique and remarkable story.

With 2024 upon us, I encourage you to embrace this notion of enoughness and self-worth, celebrating your present completeness. Simultaneously, acknowledge and honor your latent potential and possibilities. Remember, you are enough as you are, yet you also hold the promise of tremendous growth and evolution.

So, celebrate and embrace who you are, not just for your achievements or future ambitions, but for your inherent qualities, embracing both your radiant light and your darkest shadows. In this new year, may you honor your wholeness and carry a sense of enoughness, while remaining open to the unfolding of your untapped potential and future possibilities.

With that, it's time to begin the 2023 Ultimate Annual Review. I wish you a holiday season filled with love, light, and special moments.

Need help? Feeling stuck? Have feedback?



**“Until we can receive with an open heart,
we're never really giving with an open
heart.”**

Brene Brown

Life's journey can sometimes leave us at a crossroads or dead end, especially when we're digging deep within ourselves. If you find yourself feeling stuck or have thoughts to share during this reflective process, remember, you're not alone.

I'm just a message away at s@schlaf.co. Whether it's a question, a moment of insight, or feedback about the review, I'm here to listen and help. Your perspectives and experiences are invaluable, and I'm eager to hear how this journey is unfolding for you.

Tips & tricks

“Create an environment where you’re free to express what you’re afraid to express.”

Rick Rubin

💡 As you embark on this journey of introspection and discovery, these pointers are designed to ensure you get the most out of the process. Whether you're a first-timer or a returning participant, these tips will help you create an optimal environment for reflection, encourage thoughtful engagement, and remind you to embrace this journey with an open heart and mind.

Here are some tips:

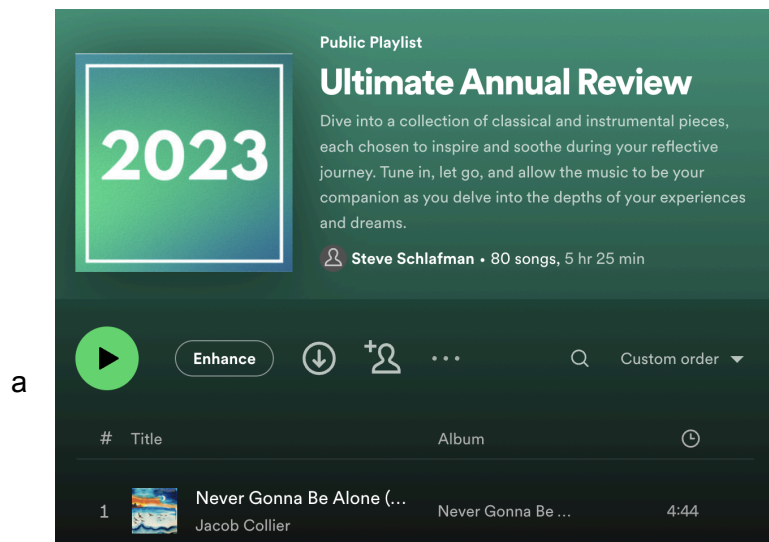
- 👤 Recruit a group of friends or family for accountability
- ⌚ Give yourself ~2 weeks to finish the process
- 📅 Block out several 1-2 hour slots on your calendar
- 💰 View this as an investment in yourself and your future
- 🧘 Find a quiet space and a comfortable chair
- 📵 Turn off your mobile devices, wifi and unplug
- 🎵 Play music that energizes and/or inspires you
- ✨ Be bold, honest, and genuine (BE YOU)
- ➡ Move through the exercises at your own pace—there’s no rush

🤖 Don't forget to have fun and enjoy the process

The 2023 playlist

“Music is a language that doesn’t speak in particular words. It speaks in emotions, and if it’s in the bones, it’s in the bones.”

Keith Richards



💡 Step into reflection and self-discovery with a carefully curated 2023 playlist. This collection of classical and instrumental pieces is more than just background music; it's a tapestry of sounds designed to inspire creativity, foster introspection, and set the stage for profound review experience. Tune in, let go, and allow the music to be your companion as you delve into the depths of your experiences, dreams, and plans.

🎵 [Access and download the playlist here on Spotify](#)

Step 1: Plot Your Moments & Milestones

"You can't connect the dots looking forward; you can only connect them looking backwards. So you have to trust that the dots will somehow connect in your future."

Steve Jobs

💡 This initial step is all about taking a walk down memory lane and charting the significant events of your year. It's a time to pause and reflect on the moments that have shaped you—the triumphs, the challenges, and everything in between. This exercise isn't just about recalling events and moments; it's about recognizing the narrative arc of your year. By constructing a timeline, you'll gain a clearer, more comprehensive view of your journey through 2023. So grab your calendar, journal, or any other source that captures your story, and let's start plotting this chapter of your life.

🕒 **Est Time:** 30-60 Minutes

📅 **Plot** monthly or quarterly

Sources

📅 Calendar

📖 Journal

📱 Social Media

✉ Email

 Camera Roll

 Health Data

What were your major moments, milestones, and memories?

 Volunteered

 Took a risk

 Formed a habit

 Got Married

 Built a new habit

 Moved cities

 Changed jobs

 Protested

 Took a course

 Founded a startup

 Had a baby

 Learned to cook

Your Timeline

 List the major moments, milestones and events that shaped 2023:

 **January**

-

 **February**

-

 **March**

-

 **April**

-

 **May**

-

June

-

 **July**

-

 **August**

-

 **September**

-

 **October**

-

 **November**

-

 **December**

-

Step 2: Capture Your Reflections & Lessons

Without reflection, we go blindly on our way, creating more unintended consequences, and failing to achieve anything useful."

Margaret J. Wheatley

💡 This stage of our journey invites you to dive deep into the heart of your experiences over the past year. It's a space for you to engage with your emotions, celebrate your achievements, and confront your challenges. Here, honesty and vulnerability are key. You'll be reflecting on successes, learning from obstacles, and understanding the impact of relationships in your life. Embrace this opportunity for self-assessment and profound learning as you distill the essence of your year into lessons that will illuminate your path forward.

🕒 **Est Time:** 60-75 Minutes

💜 Go inward and be patient

Success & Growth

1 What am I most proud of personally?

2 What am I most proud of professionally?

3 What new skills did I develop? (e.g. active listening, saying no, etc.)

4 What new habits did I develop? (e.g. meditation, journaling, etc.)

5 How am I different based on what I experienced this year?

Obstacles

1 What goals didn't I accomplish?

2 For each, did someone or something hold you back? Did my goals or circumstances change? What happened?

3 What were the biggest obstacles I faced?

4 How did I meet or overcome these obstacles?

5 What do I regret this year? (e.g. avoided a discussion, stayed in my job, etc.)

6 What behaviors or habits held me back? (e.g. not sleeping, being dishonest with people, planning but not starting, etc.)

7 What beliefs about myself held me back? (e.g. I'm not talented enough, I don't know where to start, etc.)

People & Relationships

1 Who had a positive impact on me and my life? How did they impact me?

2 Who held me back and/or drained me? How did they impact me?

3 What new relationships did I build this year?

Health & Wellness

1 What behaviors boosted my health?

2 What behaviors degraded my health?

3 When have I felt the most energized? (e.g. mornings when I got 7 hours of sleep, mastering a skill at work, playing dodgeball with my club team, etc.)

4 How has physical discomfort and pain affected me this year?****

5 How has mental and emotional pain affected me this year?****

Lessons & Themes

1 What lessons did I learn this year? (hint: see below for areas of your life to consider)

2 What 3-5 words or phrases would I use to describe 2023? (e.g. stressed, chaotic, inspired, growth, sobriety, etc.)****

3 What am I most grateful for?

Step 3: Assess Your Current Life

“Anytime we can listen to true self and give the care it requires, we do it not only for ourselves, but for the many others whose lives we touch.”

Parker Palmer

💡 This step is an invitation to pause and evaluate where you stand across the various dimensions of your life. With a clear and open mind, you'll assess aspects ranging from health and family to career and spirituality. This isn't just about scoring each dimension; it's a thought-provoking exercise to gain perspective on your overall well-being and satisfaction. Be honest and intuitive as you rate each area, and let this assessment guide you in identifying the facets of your life you're most motivated to focus on and nurture in 2024.

🕒 **Est Time:** 30-60 Minutes

📌 Capture your level of satisfaction

Give each a value from 1-10

😞 1 means “highly unsatisfied”

😊 10 means “couldn't get any better”

🔍 Identify what you want to focus on

Your Life Dimensions

Life Dimension	Prompt	Score	Comments
🏃 Health	How does your body and mind feel?		
👨👩 Family	How do you feel about about family?		
👯 Friends	How do you feel about your social life?		

 Romance	How do you feel about sex and love?
 Money	How do you feel about money and finances?
 Career	How do you feel about your job and career?
 Spirituality	How do you feel about your connection to something bigger?
 Personal Growth	How do you feel about your personal growth?
 Professional Growth	How do you feel about your professional growth?
 Leisure + Play	How do you feel about your level of recreation and fun?
 Technology	How do you feel about the role technology plays in your life?
 Environment	How do you feel about your surroundings at home, work and play?

Reflections

- 1 What three things stand out from this exercise?
- 2 Which dimensions am I motivated to focus on in 2024?

Step 4: Identify Your Intentions

**“At the center of your being
you have the answer;
you know who you are
and you know what you want.”**

Lao Tzu

💡 Now, we shift our focus to the future. This step is about setting clear, intentional goals for the upcoming year. It's an invitation to dream big, yet stay grounded in realism. Consider what you truly desire for yourself in 2024—in your personal growth, relationships, career, and beyond. Reflect on the changes you wish to make and the growth you aspire to achieve. This is a time to be bold in your aspirations while being honest about your current realities. Let your answers guide you toward a year where your actions align closely with your deepest intentions and values.

🕒 **Est Time:** 60-90 Minutes

☀️ Be bold yet realistic

Creating Awareness

- 1 What big questions about my life am I asking myself?
- 2 If I knew I couldn't fail what would I focus on?
- 3 What do I know to be true that I'm not acting on?
- 4 What do I want for myself?
- 5 What would I love to learn?

6 How would I love to grow?

Moving On

1 What attitudes, beliefs and behaviors do I want to shed?

2 What activities do I want to walk away from?

3 What do I need to say no to?

4 What do I want to say no to?

Habits & Behaviors

1 What habits and behaviors do I want to start?

2 What habits and behaviors do I want to stop?

3 What habits and behaviors will I continue?

Fears & Obstacles

1 How will I challenge myself?

2 What permission do I need to give myself? (e.g. it's ok to walk away from that relationship that isn't serving me, it's ok to slow down, it's ok to put myself first, etc.)

- ③ What internal obstacles do I need to break down? (e.g. limiting beliefs, creative blocks, etc.)
- ④ What external obstacles do I anticipate facing? How will I prepare? (e.g. layoff, pandemic, tough boss, etc.)

Relationships

- ① What relationships in my life will I prioritize this year**?**
- ② What relationships no longer serve me?
- ③ Who would I like to reconnect with?

Step 5: Set Your Goals & Action Plan

“How do these geese know when to fly to the sun? Who tells them the seasons? How do we, humans, know when it is time to move on? As with the migrant birds, so surely with us, there is a voice within, if only we would listen to it, that tells us so certainly when to go forth into the unknown.”

Elisabeth Kubler-Ross

💡 This step marks a pivotal transition from reflection to action. Here, we transform insights and intentions into tangible goals and actions for 2024. This step is about defining what success looks like for you, understanding the significance of each goal, and laying out a practical action plan. Remember, the goals you set here are the milestones you'll strive towards in the first three

months of the year. Let's create a roadmap that leads you to move closer to what you want to manifest in 2024.

 **Est Time:** 60 Minutes

 Where the rubber hits the road

Purpose & Goals

- 1 What is my purpose in 2024? (If you would like some guidance, here's an essay I wrote about [purpose and ambition](#))
- 2 Brainstorm: What goals *might* I like to accomplish?
- 3 Of those, what 1-3 goals do I *really* want to accomplish?

Your Action Plan

My Growth Priorities →

Goal 1: Goal 2: Goal 3:

- 1 What's important about this to me?
- 2 How will I be different when I've achieved this?
- 3 What does success look like? How will I know?
- 4 From 0-10, how confident are you you'll hit this goal?
- 5 Why might you fail to hit this goal?
- 6 What beliefs and behaviors support this goal?
- 7 What beliefs and behaviors hinder this goal?
- 8 Who can help and provide accountability?

9 What 3 specific but small steps can I take to get started?

Step 6: Write To Your Future Self

“The future depends on what you do today.”

Mahatma Gandhi

💡 You've reached the final step in your annual review journey. You now have the unique opportunity to communicate with your future self. It's a moment to encapsulate your current thoughts, feelings, aspirations, and lessons into a message that will reach you in the future. Think of it as a time capsule of self-reflection, a personal reminder of where you were at this point in time. As you write this letter, be honest, hopeful, and heartfelt. What you capture today will be a beacon for your future self, a reminder of your journey and growth. Embrace this chance to connect with the person you are yet to become. What do you want them to know about you, your life, and your future right now?

🧠 What do you want to remember?

✉️ Send letter via FutureMe.org

🕒 **Est Time:** 45-60 Minutes

🎉 This is the last step!

Dear Future Me,

As you stand at the end of 2024, remember the journey that brought you here. Reflect on the key lessons you've learned, the goals you've pursued, the pivotal moments that have shaped you, and the emotions that color your life right now. Think about what you're deeply grateful for

today, and the changes you hope to see in your life. Above all, what is the core message or insight you *really want* to carry forward from this moment to the next year?

With hope and reflection,

Me

A final note

📧 *You made it! A huge congratulations on completing your Ultimate Annual Review!

The time, effort, and heart you've poured into this introspective journey is not just commendable, but truly inspiring. What you've achieved is far from ordinary—it's a significant milestone worthy of celebration and deep appreciation. By completing this process, you've taken a powerful stride in both understanding and consciously shaping your life's path. Well done.*

As you head into 2024, I want to extend my heartfelt wishes for your path ahead. May the insights you've gathered here illuminate your way with hope, strength, and a world of possibilities. Each new day brings a chance to live out the lessons and reflections you've gleaned, weaving them into the ever-evolving tapestry that is your life.

*Remember, I'm always here to offer support, guidance, or simply to listen. Don't hesitate to reach out at any time at s@schlaf.co. Here's to a magnificent 2024, a year where you continue to grow, thrive, and shine your unique light on the world around you.

With love and light,

—Steve

May The Light Of Your Soul Guide You
by John O'Donohue

May the light of your soul guide you.
May the light of your soul bless the work
You do with the secret love and warmth of your
heart.
May you see in what you do the beauty of your own
soul.
May the sacredness of your work bring healing,
light and renewal to those
Who work with you and to those who see and
receive your work.
May your work never weary you.
May it release within you wellsprings of
refreshment, inspiration and excitement.
May you be present in what you do.
May you never become lost in the bland absences.
May the day never burden you.
May dawn find you awake and alert, approaching
your new day with dreams,
Possibilities and promises.
May evening find you gracious and fulfilled.
May you go into the night blessed, sheltered and
protected.
May your soul calm, console and renew you.