

Tiago's Annual Review Template

0 | Preparation

- Set aside enough time to complete your review in a quiet, dedicated space
- Take notes to capture any ideas, projects, or goals that come up during this process, to get them off your mind
- What area(s) of your life do you most want to focus on for this review?
- Where do you want to gain more clarity, creative inspiration, or freedom?
- How do you want to feel at the end of it?
- Set a deadline to publish or share your Annual Review

1 | Remember

- What was your favorite music?
- What were your favorite photos?
- What were your favorite videos?
- What was your favorite reading?
- What were your favorite notes?
- What were your favorite courses?
- What was your favorite travel?
- Write Gratitude List
- What was your favorite speaking, teaching, awards, or recognition?
- What were your favorite memories?

2 | Connect

- What was your biggest surprise?
- What were the risks you took?
- What compliment would you like to have received? Given?
- What was your most loving service?
- How would you characterize the last year for you?
- Which aspect of last year was most challenging? What was the most useful?
- Where did you invest your time last year? Where would you have liked to invest more or less?
- Who were the most influential people in your life last year?
- List your 3 top wins for the year
- Review Annual Review from a year ago – is there anything you want to bring forward?

- Review your 2020 goals (if you had them) – write a short phrase describing the outcome of each
- Make an inventory of all completed projects, expeditions, and milestones – write a short phrase describing the outcome of each
- What were your disappointments from the year?
- What are the biggest lessons you've learned this year?
- What stories from last year are you letting go of?
- What about your work are you most committed to changing and improving?
- What are the big questions you are holding for this year?
- What advice would you like to give yourself?
- Review your “areas of responsibility” – in which areas would you like to raise the standard and what is one project that would do so?
- What else do you need to do or say to be complete with this year?

3 | Create

- What brings you the most joy and how are you going to do or have more of that?
- What is one as yet undeveloped talent you are willing to explore?
- Who or what, other than yourself, are you most committed to loving and serving?
- What do you think your biggest risk will be?
- What are you looking forward to learning?
- What one word or phrase would you like to have as your theme this year?
- What are you planning to do to improve your financial results?
- Which goals will you commit to this year? (don't forget to revisit the note you created earlier with ideas to revisit later)
- What are your immediate next steps to achieve these goals?
- What new habits can you cultivate that will help you to achieve these goals?
- What bad habits can you eliminate that will help you to achieve your goals?
- What goals, activities, or projects can you eliminate from last year?
- What would you like to be your biggest win? What would make this year your best year ever?