



## A Personal Retrospective & Guide

# What Was & Will Be

**T**he end of the year is a time for reflection—a chance to inventory our lives over the last twelve months. For over a decade, I’ve made time during holidays to sit quietly and ponder the year’s significance. I dig through emails, text, photos, articles, and journal entries dating back to January 1st. Often I stumble upon forgotten events, challenges, and under-appreciated accomplishments. Dusting them off to reconsider their meaning after the passage of time typically yields new perspectives for growth.

This practice leaves me feeling grateful and at peace for the year that has passed. It also gives me a firm footing to set the course for what I aspire to in the new year, in both business and my personal life.

In this workbook, you’ll find questions, interesting stories, thought exercises, quotes, and tools to improve your odds of finding more gratitude and growth in the coming year. The QR codes will take you to more information if you are curious about the exercise or question.

Disclaimer: The retrospective starts “soft” and asks many feeling-based questions. In contrast, the planning section is more direct. It’s very much a yin-yang exercise.

Aim up!

George Morris



# Set & Setting

Controversial Harvard psychologist, Timothy Leary, coined the term “Set & Setting,” referring to both the mindset and the environment one is in when taking a psychedelic substance. He noticed that in the right setting with the right mindset, practitioners had a more enjoyable experience. This is how I’d like to guide you in starting the What Was journal.

- Grab your phone or whatever device has pictures on it for the past year.
  - Open your photos and browse thru the entire year. Stop and reflect on any photos that gain your attention.
  - Shut down your phone or place it in do not disturb.
- Print out this workbook.
- Grab a drink and a light snack.
- Gather your favorite writing and highlighting tools.
- Find a place and time to sit, undistracted for whatever time is comfortable for you. You might split this work out over several days.
- Avoid distracting environments.
- Take a deep breath, and relax.
- Read from the beginning to the end. Doodle all over it if you’d like.
- If you are stuck, skip along to the next question. Come back later.
- Be honest, have fun. There is no right way to do this.



# Retrospective

All questions are meant to mix personal and professional life, for that is how you experience the world. Answer them as you, rather than the roles you fill.

What defined 2022 for you, and why?

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What did you do that you've never done before?

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What excited you the most this year? Why?

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What impacted your energy for the year?

3 Things that gave me energy were:	3 Things that drained my energy were?



What are three accomplishments that you are proud of?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

What did these accomplishments teach you about yourself?

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What tools or allies might help you with future challenges?

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What did you do to celebrate each of the accomplishments?

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What changes did you embrace in 2022?

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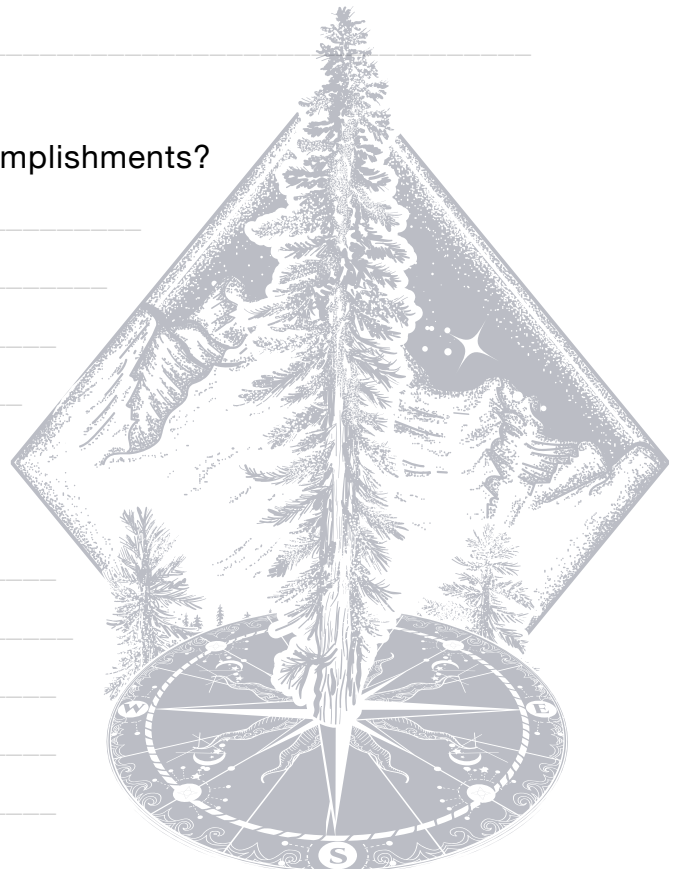
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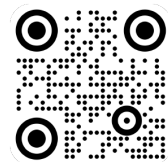
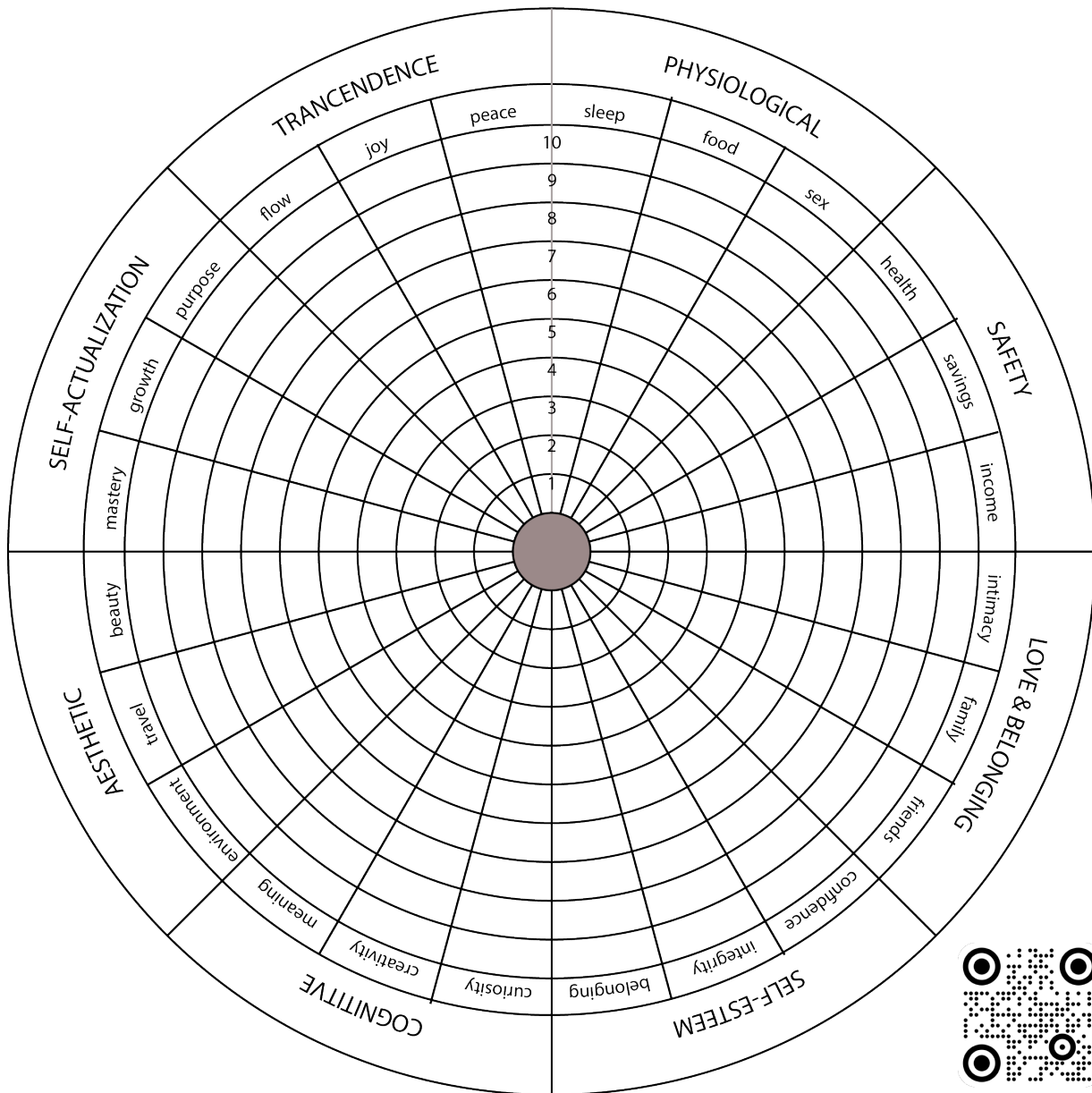
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# Wheel of Growth & Needs

Summarize your experience of the past year using the radar graph below. It's based on Maslow's Hierarchy of Needs. Answer honestly by starting at the Physiological needs and working clockwise around the wheel. Shade in the box that matches how fulfilled you are for each slice of the pie. A score of 10 indicates complete fulfillment, while a score of 1 indicates a deficit. Avoid self-judgment. There isn't a wrong or right, good or bad. There is simply an opinion of how the year felt to you.



tutorial



What area(s) on the Wheel were toughest for you to gauge? Why?

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What area(s) on the Wheel felt good to you? How so?

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What have you learned about yourself over the year?

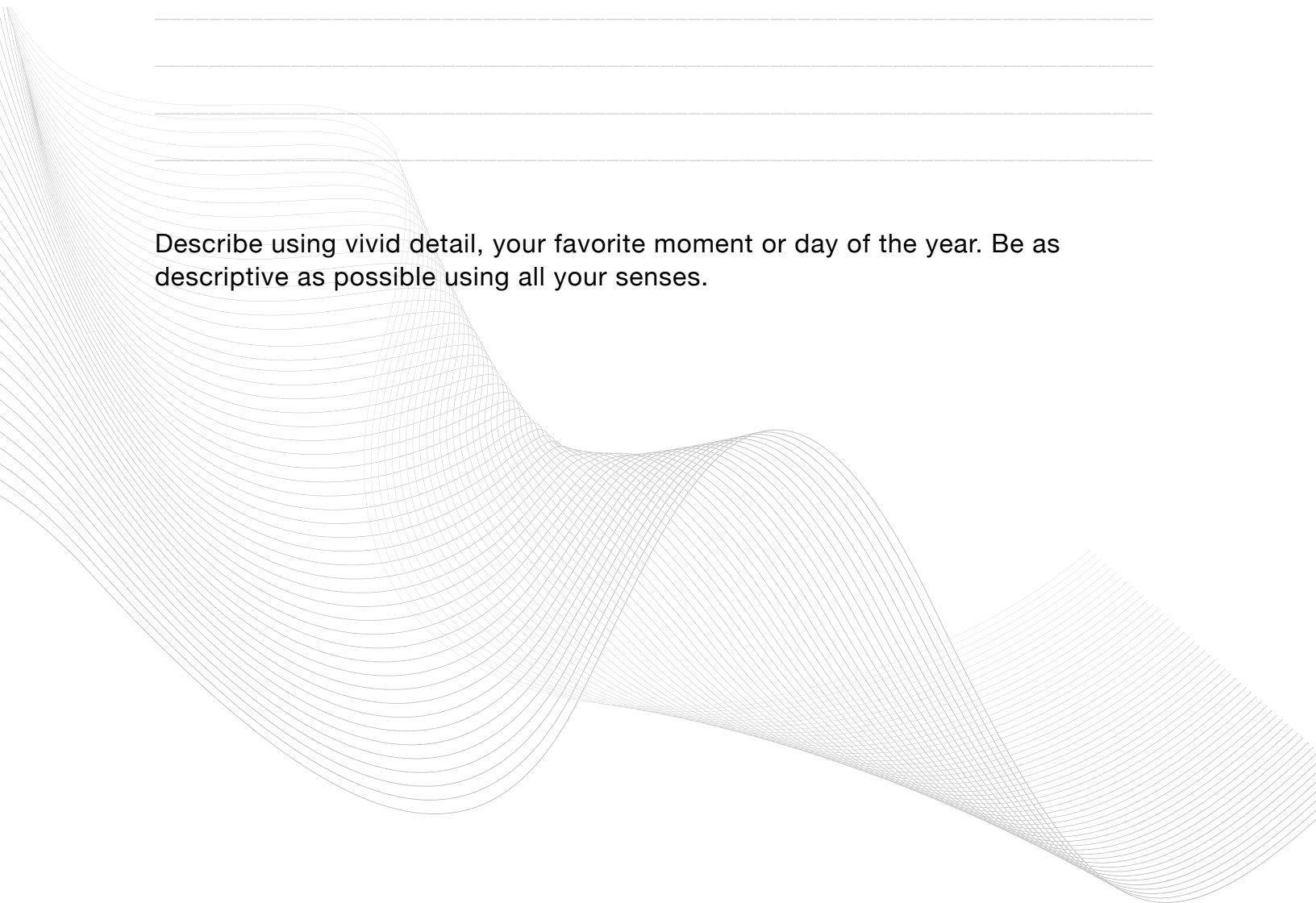
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Describe using vivid detail, your favorite moment or day of the year. Be as descriptive as possible using all your senses.





If you could take a time machine back to the beginning of 2022, what three things would you tell yourself about the upcoming year?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What are the top three issues left unresolved this year?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

When did fear held you back this year?

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Where did bravery move you forward?

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Where did you need grit, and how did you find it?

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*What pain do you want in your life?  
What are you willing to struggle for? -  
Mark Manson*





# Jerry's 4 Questions

While in Techstars, I met entrepreneur Jerry Colonna. I learned his four crucial questions to continually ask yourself. I often refer to this when I'm feeling stuck. Read them aloud to yourself, and be honest with your answers.



What am I not saying that **needs to be said**?

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What am I saying that's **not being heard**?

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What is being said that I'm **not hearing**?

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How have I **been complicit** in creating the conditions I say I don't want?

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What three words summarize 2022?

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_





# Emptying the Garage

In 2022 you've accumulated an array of physical, intellectual, and emotional assets and weights. It's time to part with those things that weigh you down.

Who are three people you need to let go of, and why?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What physical stuff can you pile up and either toss in the trash or give away?

Give Away

Trash It

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Where do you need to practice self-forgiveness and self-compassion? Write it out.

I forgive myself for \_\_\_\_\_

I forgive myself for \_\_\_\_\_

I forgive myself for \_\_\_\_\_

Anything else you need to toss so you can get on with 2023? Apps, distractions, bad habits?



# 2023

## Let's Go!

Energy flows where your attention goes. Now that we've processed the past year, more of your energy can go to growth and building the life you desire most. As I said in the intro, these questions are more hard-hitting and require a gut check from time to time.

When you are done, you'll have three goals for 2023, and the tools required to reach them.

My content pulls inspiration from the Stoics, Navy SEAL David Goggins, Professor Jonathan Haidt, Dr. Benjamin Hardy, Author Mark Manson, and Psychologist Ethan Kross.



# Soul Inventory

We are all familiar with our inner voices. They are guides to how we navigate life. Depending on our energy, stress levels, motivation, etc, different voices will show up. It's my belief that most of these voices originate in the head. They are the summation of our life stories and experiences, but they are not us. As Social Psychologist Professor Jonathan Haidt says, "the mind is a story processor, not a logic processor."

What limiting beliefs or stories have held you back in life?

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Beneath our stories are feelings. When we feel, our brains cook up stories to make sense of our feelings. Our emotions strengthen us, but left unchecked; they enslave us.

What primary emotion has driven you in life? This pulls from DISC profiling. There are four options. Circle the one that most pertains to you:

- Fear of being taken advantage of.
- Fear of conflict and social rejection.
- Fear of change or loss of stability.
- Fear of criticism, being wrong, or wild emotional display.



Your fear is a double-edged sword. It has gotten you where you are, but where is this fear holding you back from attaining your potential?

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We have a termed lease on our physical body, with no trade-in value or ability to replace it. Our diets and exercises drastically impact our output and mental state.

In the upcoming year, what can you do with your body to show it more love and appreciation?

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Lastly, there is a quiet voice in us all. I call it our Soul; some call it our Spirit or Truth, perhaps even God. It's the perspective behind the perspective. If our inner voice is the camera vantage point for our life, then our Soul is the onlooker seated behind the camera operator. It observes the story of our life, witnessing everything, not judging.

What do you know in your Soul that you are capable of, but haven't yet shown?

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# Ambitions

New years are filled with possibilities. Let's dream a bit.  
What are you excited for or want out of the new year?

## Personal Ambitions

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## Career Ambitions

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## Family Ambitions

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## Relationship Ambitions

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## Career Ambitions

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## Community Ambitions

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## Physical Ambitions

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## Spiritual Ambitions

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# Greatness

Deciding what to do today, right now, is easy. Slightly more difficult is the ability to plan our week. Holding to even a weekly plan proves difficult for most because reacting is easier than responding. Zero thought is required to react. By contrast, responding needs thought and reflection. It's slower, requires mental attention, and a reference point to weigh the response against. Responding forces consideration and prioritization. Responding needs a true north to anchor to.

Trouble is, most people lack a true north. Our lives are polluted with distractions of all sorts and goal setting isn't a required course in school. Everything cascades down from our true north. It anchors our goals and everything that goes into reaching our goals.

According to Brian Tracy, **less than 3% of Americans write down their goals** and even less than 1% work on their goals every day by reviewing and, if necessary, rewriting them.

If you made it this far, you, my friend, are in the minority! Congratulations, now let's take the next step!

What does greatness mean to you? Sit on that! Don't write a textbook response or what society told you it means. What does it mean to YOU? You get to define greatness on your own terms. Spell out what it means and what it looks like for you to achieve greatness. Get detailed with it, feel it!

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Write one or two sentences describing the “why” behind your greatness statement. It speaks to a theme behind your ideal of greatness.

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When you read your greatness out loud, what are the feelings that come up for you? The stronger the feelings, the stronger the emotional resonance and internal alignment. It’s normal to have fear as a feeling here. In fact, you may have contradictory feelings, which is perfectly fine. Describe them fully.

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In your most challenging times, how have you persevered and shown grit?

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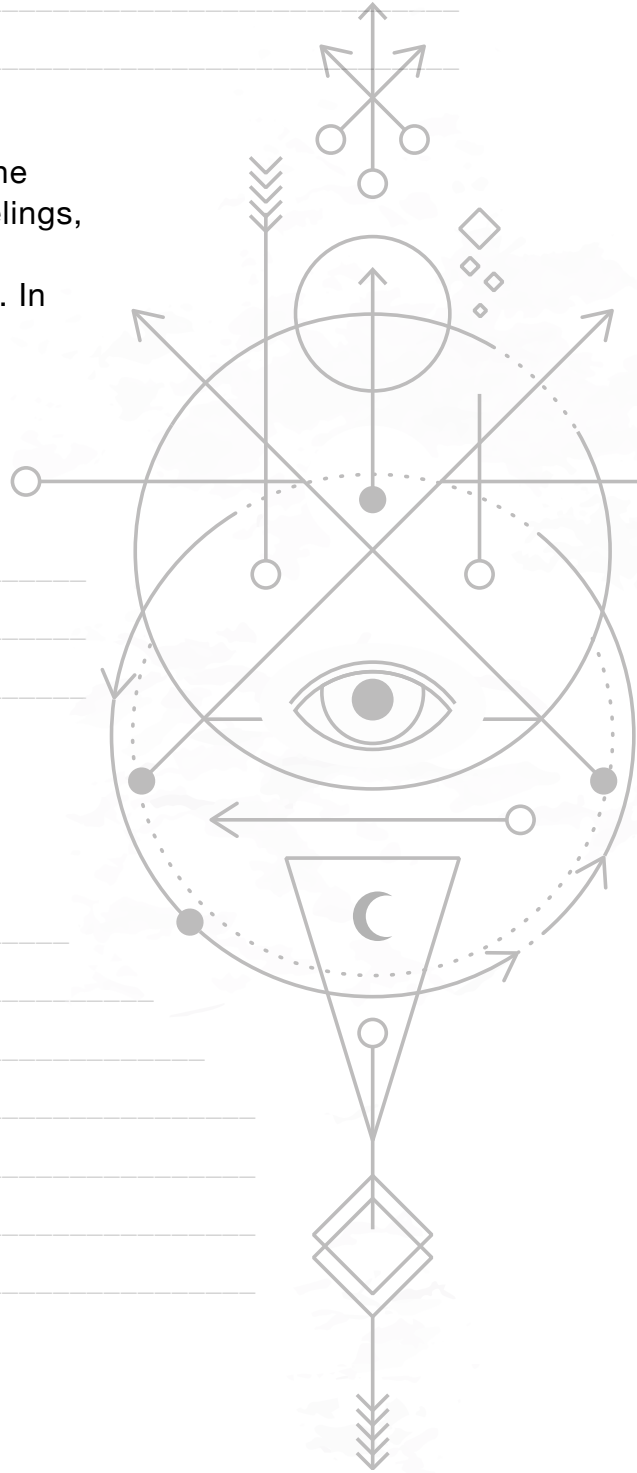
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# North Star

*"If you don't have a consistent goal in life, you can't live it in a consistent way." - Marcus Aurelius*

Harriet Tubman used the North Star to free herself from slavery. She would walk 90 miles over seven weeks to make the journey. Through swamps, rivers, rocky terrain, and wild temperature change. Avoiding men on horseback with hunting dogs, all looking to capture her. She didn't make this journey once; she made it 19 times!

We're going to find your "North Star."  
It's that guiding light to tap when going thru the suck.

To be clear, the North Star is not a destination. You will never reach it. It serves to guide you on your path to greatness. As you strive, you grow. The North Star pulls us towards it. It doesn't push us forward. The push comes from you and the strength of your desire and determination to push on. You strive by going through the obstacles that stand in your way.

Referencing the previous pages, summarize what you believe your North Star is, in one sentence. Make several attempts to write it below:

**Example: To be the toughest man that ever walked the Earth**  
David Goggins. (Navy SEAL, Ultramarathon runner, Guinness World Record Holder, Best Selling Author)







What obstacles are in the way of achieving your greatness?

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What do you need to push thru these obstacles?  
ie. Skills, resources, knowledge, connections, time.

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Looking at your North Star, Greatness Statement, and Obstacles, what three goals for the year would help you unlock more of your potential? Make them ambitious and somewhat uncomfortable.

Goal 1: \_\_\_\_\_

Goal 2: \_\_\_\_\_

Goal 3: \_\_\_\_\_

In the following pages, you'll break down your three goals. You'll get clear on why they matter and what you'll need to grind thru the inevitable suck that will surely greet you on your way! These goals will be FAST goals, *frequently discussed, ambitious, specific, and transparent.*

**Self-Contact**

I know these goals won't be easy to attain. I've picked these goals because they are challenging and meaningful, and the sacrifices I'll make in pursuit of these goals will unlock more of my potential, happiness and self-worth. When things suck, I will tap into my future self to push through my hard times. It's what I want!

Signed: \_\_\_\_\_ Date: \_\_\_\_\_



# The Core

In my 20s and 30s, I used to roll my eyes whenever someone asked about my core values. Images of motivational posters would pop into my imagination whenever the topic came up until a colleague showed me how he hired and fired based on core values. Either his team was aligned and bought in, or they weren't; it was that clear. He was looking to hire people who shared his core values because having shared values established trust and commitment and brought more joy into the workplace.

Everyone has core values. They are either stated somewhere, written on a wall or a journal, or hidden in your subconscious mind. Clear core values help eliminate the noise from the signal in life.

If a third party came into your life as an invisible watcher, documenting your thoughts and actions. Everything you did in public and in private for a full week. What five things would a reasonable person conclude about your value system? Don't write in some Ego-protecting bullshit statements about what you'd like others to conclude.

These are your unstated organic values. FYI - They may not be flattering if you aren't living the life you want to live. Be honest!

Example: I avoid discomfort.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

*Organic  
Values*

What five values do you aspire to but may not yet live?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

*Aspirational  
Values*



Referencing your Organic and Aspirational Values, list up to five Core Values and what they mean to you.

Value Statement	What does it look like to live it?
Example: Be uncompromising with my time.	Example: My time is a limited resource. I will not squander it or use it in ways that undermine my goals in life.
Core 1	
Core 2	
Core 3	
Core 4	
Core 5	





# Goal 1

What are you willing to do to review your goal regularly and keep it front of mind?

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Why is this goal ambitious?

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What specific measure will tell you this goal has been achieved? What indicates to others that you've achieved this goal if it's not quantifiable?

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How will you be transparent with those closest to you regarding your progress and the support you need?

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List out the obstacles you'll need to go through in order to reach this goal:	

When you fall behind, feel stuck, frustrated and lack the resolve to move forward, you'll need a nudge. What can you say to your future self to get back on track? Write it as you are talking from the 3rd person because the voice isn't coming from you. It's coming from who you will be!

Ex: "I want to do what's best for LeBron James and what will make LeBron James happy."

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# Goal 2

What are you willing to do to review your goal regularly and keep it front of mind?

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Why is this goal ambitious?

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What specific measure will tell you this goal has been achieved? What indicates to others that you've achieved this goal if it's not quantifiable?

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How will you be transparent with those closest to you regarding your progress and the support you need?

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List out the obstacles you'll need to go through in order to reach this goal:	

When you fall behind, feel stuck, frustrated and lack the resolve to move forward, you'll need a nudge. What can you say to your future self to get back on track? Write it as you are talking from the 3rd person because the voice isn't coming from you. It's coming from who you will be!

Ex: "I want to do what's best for LeBron James and what will make LeBron James happy."

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# Goal 3

What are you willing to do to review your goal regularly and keep it front of mind?

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Why is this goal ambitious?

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What specific measure will tell you this goal has been achieved? What indicates to others that you've achieved this goal if it's not quantifiable?

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How will you be transparent with those closest to you regarding your progress and the support you need?

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List out the obstacles you'll need to go through in order to reach this goal:	

When you fall behind, feel stuck, frustrated and lack the resolve to move forward, you'll need a nudge. What can you say to your future self to get back on track? Write it as you are talking from the 3rd person because the voice isn't coming from you. It's coming from who you will be!

Ex: "I want to do what's best for LeBron James and what will make LeBron James happy."

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# The Sacrificial

Everything we do comes at a cost. When we say yes to one thing, we say no to something else. We often say yes to too many things in life, destroying our ability to focus on the important.

For the few that set goals, they often fail. Churchill said it best when he said **“he who fails to plan, is planning to fail.”** Yet, I think that’s just half the picture. Plans tend to be tactical and look only at what needs to be accomplished rather than what also needs to be sacrificed in the name of the goal.

As David Goggins points out, “The planning phase is a comfortable phase, made in a room in your house. There is no judgment, no failure, no nothing. It’s where the majority of us fail because we lack a call for action. The call to action is when the alarm clock goes off. That’s where you know, am I real or am I fake.”

Now that we’ve done all this work, it’s time for you to decide what price you will pay for attainment. For greatness! Looking at your three goals, name up to nine things you are willing to sacrifice to give you the energy and space needed to unlock more potential, and tie them to their goal(s).

**Examples:**

Getting out of my warm bed every day by 6 am. Including weekends.

No more sub 45 hour work weeks.

Elimination of all refined sugars.

- 1. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 2. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 3. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 4. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 5. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 6. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 7. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 8. \_\_\_\_\_ Goal(s) # \_\_\_\_\_
- 9. \_\_\_\_\_ Goal(s) # \_\_\_\_\_



**North Star**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Goal # 1:** \_\_\_\_\_

Motivating Statement:

A Few Obstacles I Will Vanquish:

**Core Values List**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Progress Made:

**Goal # 2:** \_\_\_\_\_

Motivating Statement:

A Few Obstacles I Will Vanquish:

**Sacrificial List**

(abbreviate if necessary)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

Progress Made:

**Goal # 3:** \_\_\_\_\_

Motivating Statement:

A Few Obstacles I Will Vanquish:

Progress Made: