

# **MID-YEAR REFLECTION & PLANNING**

**Guided Digital Workbook**

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# LET'S DO SOME MID-YEAR REFLECTION!

This guided workbook is a place for you to record reflections at the mid-point of the year. I view reflection as a way to practice slow productivity because we're intentionally taking time to slow down and review our experiences, perhaps learning something new about ourselves and our desires in the process.

## NICE TO MEET YOU!

My name is Dr. Kate Henry. I'm a Productivity Coach who specializes in sustainable and well-being-oriented productivity. I guide academics and entrepreneurs to develop actionable and achievable productivity and time management practices so they can achieve short-term and long-term goals without feeling overwhelmed.

In addition to my work as a Productivity Coach, I am an independent researcher and author of *Tend to It: A Holistic Guide to Intentional Productivity*. To access more free resources similar to this guide, subscribe to my free weekly newsletter at [KateHenry.substack.com](https://KateHenry.substack.com).

To learn more about my individual coaching and group programs, visit [www.KateHenry.com/work-with-me/](https://www.KateHenry.com/work-with-me/)

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# HOW TO USE THIS WORKBOOK

To get the most out of this Mid-Year Reflection and Planning Workbook, you should work your way through these sections.

**[CLICK TO LISTEN TO THE  
WALKTHROUGH OF THIS WORKBOOK](#)**

Start with the **What is Reflection?** section to learn why allocating time for reflection can have positive effects on your life.

The **Imagine Looking Back** prompt will offer you a creative way to reverse engineer your year. By considering where you want to end up and how you want to feel come December 31st, you'll identify helpful boundaries and inspiration for the rest of your year.

The **Start, Stop, Continue** section includes prompts to help you slow down and identify actionable shifts you can make in terms of how you spend your time, energy, and other personal resources.

The **Choose a Guiding Theme** section will help you reflect on your year overall or on certain aspects of your personal and professional life. These themes might be a value, a dream, an affirmation, or a virtue that you're trying to hone.

I hope you enjoy using this guided workbook and that you learn exciting new things about reflection and planning prompts. You can reach me at [Kate@KateHenry.com](mailto:Kate@KateHenry.com) with any questions.

Take care,  
Dr. Kate

# WHAT IS REFLECTION?

The instruction to reflect holds strong across academia, business, and self-development. Yet, regardless of its value, many of us fail to actually follow through on our intentions to reflect.

This may be due in part to the complex double act of reviewing and planning: by definition, the verb “reflect” means both “to bend or fold back” and “to make manifest or apparent.” As it stands, we might simply not know how to do it, why it matters, or we don’t want to waste our thinly-spread-as-it-is time.

In what follows, I break down the “whats” and “whys” of reflection to show the benefits of the practice, describe how to make it work for you, and share with you the reflection practices and questions that are most helpful to me. What better time than halfway through the year to re-see reflection as both an act of “looking back” and a “looking forward”?



# THE PURPOSE OF REFLECTION

According to Tracy Kennedy, Lifehack's Personal Development Expert, reflection offers multiple benefits. As detailed in her article, "[How Self-Reflection Gives You a Happier and More Successful Life](#)," reflection can improve our lives in the following ways:

- Improves self-awareness
- Provides perspective
- Allows you to respond, not react
- Facilitates a deeper level of learning
- Improves confidence
- Challenges your assumptions

In addition to improving our self-knowing and presence, reflection can help us make better decisions when it comes to growth and change. Jennifer Porter, executive coach, reports in her Harvard Business Review article, "[Why You Should Make Time for Self-Reflection \(Even If You Hate Doing It\)](#)" that:

*The most useful reflection involves the conscious consideration and analysis of beliefs and actions for the purpose of learning. Reflection gives the brain an opportunity to pause amidst the chaos, untangle and sort through observations and experiences, consider multiple possible interpretations, and create meaning. This meaning becomes learning, which can then inform future mindsets and actions.*

Porter breaks down the purpose of reflection by connecting it to other important ideas and actions: learning, pause, untangle, consider, meaning, and, perhaps most importantly, future. She reports that many of the leaders she coaches actually put off doing reflection, sometimes because they lack an understanding of how to do it or other times because they have not prioritized it. Let's learn how to do it, shall we?

# A RECIPE FOR REFLECTION

Although reflection is greatly beneficial for decision-making and planning, it still often ends up on the back burner. I think this is because reflection requires three things: time, energy, and focus.

## TIME

I recommend that you set aside, and even schedule, time for intentional reflection. The goal is to view reflection as something that serves you, not as one more thing that you're trying to squeeze in between meetings or forcing yourself to do before bed.

## FOCUS

You can reflect in multiple ways, including handwriting, typing, and/or sharing out loud with someone else. There's no right or wrong way to "do" reflection, and while I like the slow rumination of handwriting, typing out my answers allows me to capture more ideas quickly. I've done all three, but admit that my favorite reflection process is sharing out loud with someone else.

## ENERGY

It's no surprise that reflection pulls on our mental energy: we are remembering and considering and interpreting. But, I want to note that it may also require emotional energy.

Reflection prompts ask us to think about both the highs and the lows. It is possible for us to get stuck in the quicksand of things we didn't achieve, heavy feelings like grief, disappointments or embarrassments, or other difficult memories. For that reason, I encourage you to pair questions such as "what didn't work out well?" with others such as "what went well?" or "what did I feel proud of?"

# LESS OPTIMIZATION, MORE CURIOSITY

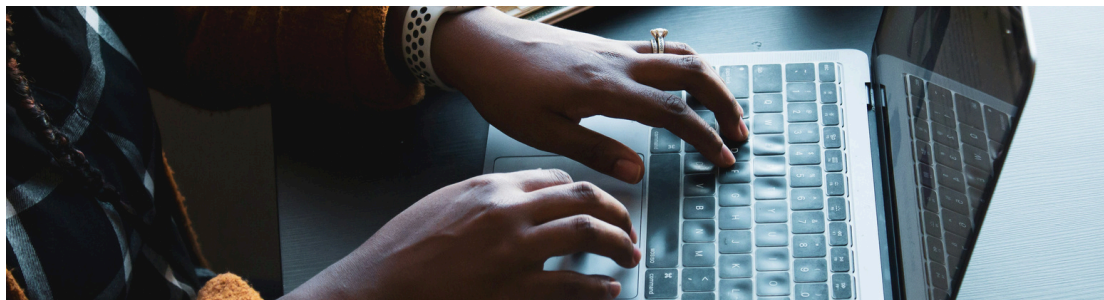
I'm going to share some reflection prompts with you, but I want to chat about optimization first.

You might do the reflection prompts in this workbook and then set aside time to develop project plans or update your calendar. You might decide you want to start a new habit or stop an old one. You might have an epiphany and make a big change to the last six months of the year.

Or, you might explore these reflection prompts as a way to get to know yourself better, without any plans to shift the ways you move throughout your days. Any of these options is great because it's up to you to decide your own purpose for looking back and looking forward.

I usually tie reflection with planning. When we make plans for our projects and set new goals, we may approach our practice with a little too much eagerness. In other words, we could fall for the trap of The Planning Fallacy (underestimating how long a task will truly take us to complete) or we might put way too much on our plate in an effort to ride the wave of excitement and opportunity we feel after a good reflection session.

It's okay, and sometimes even a nice relief, to reflect purely out of curiosity instead of decision-making or planning. I hope that you find these prompts fruitful, playful, and interesting, and should you decide to shift from reflection to planning, I encourage you to do so with mindfulness and compassion for your capacity. Don't forget to plan for rest and play!



# IMAGINE LOOKING BACK

Imagine it's the end of the year and you're looking back on how you spent your time, energy, focus, money, and other personal resources over the last 12 months.

How do you want to feel and what do you want to accomplish by the end of the year?

What steps can you take now (mid-way through the year) to help you achieve this vision you have for yourself?



# START, STOP, CONTINUE

This is one of my go-to reflection prompts because it's short but also offers clear instructions for shifts you may want to make. It may help to select themes for your own life to explore the prompts (work, creativity, relationships, etc.), or you may want to apply it to your life in general as a way to identify your priorities and set new boundaries.

## HERE'S A SHORT VERSION.

What new practice or approach do you want to **start**—and why?

What do you want to **stop** doing, participating in, thinking, or choosing—and why?

What activity, mindset, project, or approach do you want to **continue** doing or pursuing—and why?

*A longer version of Start, Stop, Continue begins on the next page.*

# WHAT DO I WANT TO START?

What am I craving?

What am I curious about?

How do I want to spend my personal resources (time, energy, focus, spoons)?

What are three new things I want to try over the next six months?

# WHAT DO I WANT TO STOP?

What challenge am I struggling with? What actions, beliefs, and/or behaviors are no longer serving me?

Is there anything I'm doing just because I feel like I "should"?

Are there any boundaries I need to set or reaffirm?

How can I bring grace and softness to ending something? (This is important if you feel apprehension or nervousness around stopping a behavior.)

# WHAT DO I WANT TO CONTINUE?

What is bringing me joy and nourishing me? What am I most proud of from the last six months?

What are my favorite parts of my day, week, or month?

What were my personal and professional highlights of the last six months?  
What matters the most to me right now?

What will be my three biggest focuses for the next six months?

# CHOOSE A GUIDING THEME

I love working with theme words because they provide structure and limitations while allowing me to re-see things through a different lens. If I'm struggling to make a decision, I can use my theme word as a guide to choose an option that lines up with my intentions. If I'm feeling stuck or confused, I can get creative and see how my theme word allows me to reimagine a path forward.

If you already chose a theme word for your year, mid-year is a great time to check in with how it's going and to reaffirm your commitment to your word's intention. Or, you might choose to select another word that feels like a better fit right now.

Whenever I select a theme word, I like to apply it as a lens to my whole life for a period of time, but you might choose separate themes for your work, relationships, etc.



# CHECKING IN ON YOUR WORD

If you chose a theme word for the year in January, here are some questions you might want to reflect on now that 6 months have passed:

Why did I choose my theme?

What did my theme mean to me when I first chose it?

What does my theme mean to me now?

What has my approach to my theme been?

# CHOOSING A NEW WORD

If you didn't choose a theme word for the year or if you would like to choose a new one now, these prompts may be helpful for you. You don't need to commit to one word for the whole rest of the year if that doesn't feel helpful. You could apply a theme to a shorter period of time or to a particular project if that feels more inspiring for you.

How do I want to feel during this process?

What strengths am I bringing with me?

What do I want to learn or develop through this process?

*Questions continue on the next page.*

# CHOOSING A NEW WORD (CONTINUED)

What excites me most about this process?

What will an ideal (“good enough”) outcome look like?

What will help me to feel grounded and calm if I run into bumps in the road?

Once you’ve reflected on these questions, review your answers and identify a theme, word, or metaphor that will motivate you to meet your personal goals. You might put this word on a sticky note to hang above your desk or set it as your phone background for a consistent reminder.



