



# Through the Looking Glass: Reflections for the New Year

By Debra Loftus, Ph.D.

**The Scene.** Every year in recent memory, the female members of my extended family have had “girls’ day out” over the holiday break. While the menfolk watch the kids or do their own version of the same, we gather at a Cincinnati-area restaurant to celebrate our connections to each other. We eat way too much (we tend to frequent a local Cincinnati restaurant that is famous for its

“mile-high pie”- I’m gaining weight just typing about it), catch up on each other’s lives, and gossip lovingly about the absent men. Lots of laughter is shared...and sometimes tears. What began as a two-generation outing currently stands as a four-generation outing, as the years have passed and our family has grown. It’s a precious ritual.

A few years ago, when conversation was flagging a bit, someone turned to me and said “hey, you’re a psychologist...what questions could we each answer about our lives over the past year to help us in the coming year?” I thought for a moment and pulled a few out of my virtual hat. A new level of depth, and hilarity, emerged. That change in our process went over so well that it has become a part of the yearly gathering, so much so that I now prepare several questions ahead of time.

All of which made a recent client exchange even more meaningful to me. This client asked whether I had some year-end reflections to provide to her, to help her use planned downtime over the holidays for a clearing out of sorts (also called a “[defrag](#)” in my last blog).

“Gosh, I have done that periodically in the past,” I replied, “but I don’t have a standard set of ‘go-to questions.’ Would you like me to create something?” “Yes!” came the enthusiastic reply.

I love when my professional and personal lives align – when a creative product can serve multiple purposes.

## The Value of Looking back to Move Forward.

Much has been written about the importance of looking back as well as forward.

Grabbing one quick sample from this vast literature, James Kouzes and Barry Posner have done extensive research into the fundamental qualities that we associate with an effective leader. In their seminal book, [The Leadership Challenge](#) (a favorite textbook in many an “Introduction to Leadership” course at the university level), they share that over 70% of thousands of folks surveyed on said qualities rated “forward-looking” as a key leadership competency (second only to honesty as the most admired trait). But, they argue, “in order to create the future, we must first look back.” Indeed, Lawrence Lippitt, the thought leader behind the “Preferred Futuring” approach, posits that by first taking a clear look at how we’ve gotten to where we are, we are able to unleash the creative juices most needed for the process of visioning forward.

The process of looking back and forward is not limited to those who are formal leaders, however. It’s also a way of life. Five centuries ago, St. Ignatius introduced a 5-step daily reflection, [The Examen](#), to the

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Jesuit order. It remains a cornerstone exercise for many spiritual practitioners, Christians and non-Christians alike. The sequential steps include a look back on one's day (or a specific period of time), guided inquiry into significant moments and emotions, followed by a look forward to potential opportunities to apply the resultant insights.

So, that is where we shall begin this year-end reflection: first by looking back. Then we will look at the present and from there, gaze forward.

Quick confession: I debated about including the section on "the present" in the spirit of brevity. But if you don't know where you are, it's hard to plan how to get where you want to go. Also, given the season we are in, it seems fitting that we travel the same paths that Scrooge did in *A Christmas Carol* – with visitations from the ghosts of past, present, and future. Although an unwilling participant at first, Scrooge grew from that reflection process as well.

**The Reflections.** The questions in each section are organized in a casual order from more general to more specific, also from more superficial to more interpretive. You might want to read them through first to see how you'd like to move through the list, and even which ones you want to use/not use. In other words, there's no sacredness to what you'll see below. Make it your own. But move through each section or type of inquiry in order (e.g. from

past to present to future), culminating in "netting it out."

I'd suggest you set aside some quiet time in a comfortable space, perhaps in one sitting or across several. Or, like the Loftus women described above, you could wait until you are in a noisy restaurant and pass questions around the table along with the bread basket.

### *The Year in Review.*

1. What were the highlights of the past year? (This is a warm-up question – more of a recounting than a creative act. Try to find 5 or more highlights but don't work too hard if no more than a few are forthcoming.)
2. If you were to assign a newspaper-type headline to this past year, what would it be? Why?
3. What was most energizing and life-giving about the last year? What drained you?

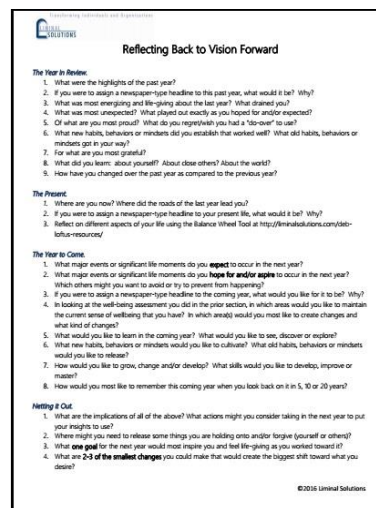


Figure 1- to download a full-page version of this guide to reflection, go to [liminal.com/deb-loftus-resources/](http://liminal.com/deb-loftus-resources/)

4. What was most unexpected? What played out exactly as you hoped for and/or expected?
5. Of what are you most proud? What do you regret/wish you had a “do-over” to use?
6. What new habits, behaviors or mindsets did you establish that worked well? What old habits, behaviors or mindsets got in your way?
7. For what are you most grateful?
8. What did you learn: about yourself? About close others? About the world?
9. How have you changed over the past year as compared to the previous year?

### *The Present.*

1. Where are you now? Where did the roads of the last year lead you?
2. If you were to assign a newspaper-type headline to your present life, what would it be? Why?
3. Evaluate your current sense of well-being in the following areas of your life on a scale from 1 (not at all where I want it to be) to 10 (exactly where I want it to be). Use any or all of the following life focus areas. (Note: if you prefer to graph it, the balance-wheel figure is available by following [this link](#) to my website.)
  - Work/Leadership Impact
  - Physical Health
  - Spiritual/Religious
  - Financial
  - Romantic/Partner
  - Family
  - Friends/Social Life

- Community/Giving Back
- Growth/Development

## Balance Wheel Assessment

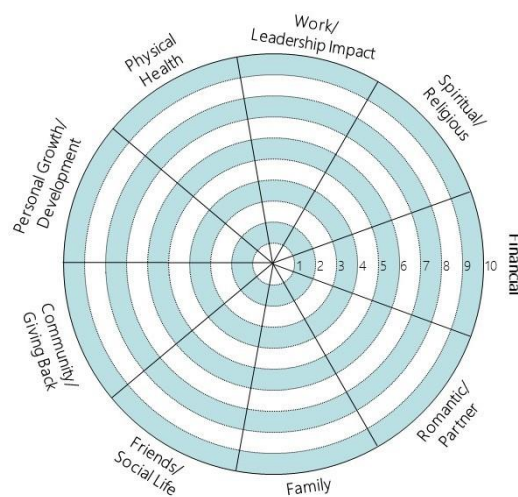


Figure 2- to download a full-page version of the Balance Wheel, go to [liminalolutions.com/deb-loftus-resources/](http://liminalolutions.com/deb-loftus-resources/)

Reflect on the ratings you have assigned to each area. How satisfied are you with each one and with the overall composite? (It's important to say here that while most of us would prefer to have a balance wheel of all 10's, life often requires tradeoffs among areas that compete for our attention and energy. So be thoughtful – and even a little kind to yourself – in this reflection).

### *The Year to Come.*

1. What major events or significant life moments do you **expect** to occur in 2017? (This, too, is a warm-up question. Simply list the most predictable significant events or life moments you see ahead for 2017 (e.g. “I will turn 50.”))
2. What major events or significant life moments do you **hope for and/or aspire**

to occur in 2017? Which others might you want to avoid or try to prevent from happening?

3. If you were to assign a newspaper-type headline to the coming year, what would you like for it to be? Why?
4. In looking at the well-being assessment you did in the prior section, in which areas would you like to maintain the current sense of wellbeing that you have? In which area(s) would you most like to create changes and what kind of changes (e.g. "I'd like to move the 5 rating that I gave to physical to an 8")?
5. What would you like to learn in the coming year? What would you like to see, discover or explore?
6. What new habits, behaviors or mindsets would you like to cultivate? What old habits, behaviors or mindsets would you like to release?
7. How would you like to grow, change and/or develop? What skills would you like to develop, improve or master?
8. How would you most like to remember this coming year when you look back on it in 5, 10 or 20 years?

### *Netting it Out.*

1. What are the implications of all of the above? What actions might you consider taking in 2017 to put your insights to use?
2. Where might you need to release some things you are holding onto and/or forgive (yourself or others)?

3. What **one goal** for 2017 would most inspire you and feel life-giving as you worked toward it?
4. What are **2-3 of the smallest changes** you could make that would create the biggest shift toward what you desire?

A final note here: while you may complete this reflection as a "one and done," it might also be worthwhile to record these thoughts now and then review them again periodically throughout the year – monthly, quarterly, whatever – making updates as you go.

**The Balance to be Struck.** For years, I had a framed poster of a favorite excerpt from *Alice's Adventures in Wonderland* hanging in my children's playroom. The quote is from Chapter 6:

"Would you tell me, please, which way I ought to go from here?"



"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where—" said Alice.

"Then it doesn't matter which way you go," said the Cat.

"--so long as I get SOMEWHERE," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

I've often used that passage in visioning sessions with groups, to help frame the importance of the work we are there to accomplish. So, I now close this last blog of 2016 with an invitation and a commitment of my own: let's walk purposefully and with clear intention into the new year, guided by thoughtful insights from the past, shall we? Given the significant global and national challenges we will confront in 2017, just getting SOMEWHERE will not be good enough. I feel that to my core.

How about you?



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