

Rearview Mirror Exercise

Answer these questions designed to help you remember where you kicked ass and what didn't work this year. Be nice to yourself – it's not about excuses or blaming, just an awareness exercise.

1. What are you most proud of accomplishing this year? (List at least 3)

2. Where did the sales flow from easily and without a lot of effort?

3. What projects, events or promotions did you enjoy most?

What didn't go so well.....

4. What didn't turn out as planned and why?

5. Did you make any important decisions that in hindsight you would handle differently?

6. If you had a "do-over card", what would you have done differently?

Goals This Year

I'm going to learn how to.....

I'm going to do more.....

I'm going to do less....

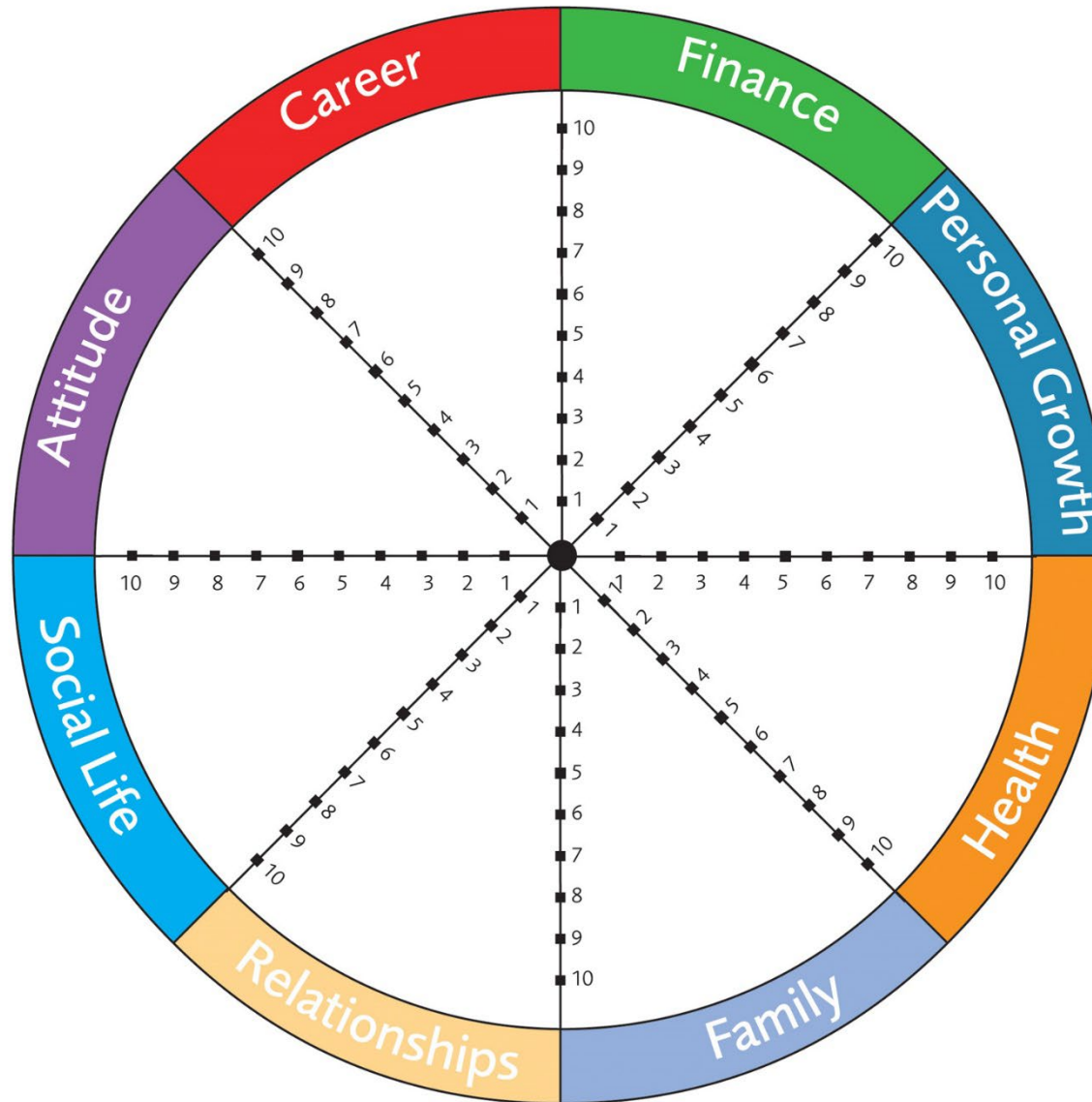
I'm finally going to...

I'm going to go....

I'm excited to...

Wheel of Life Exercise

Use this tool as a starting point for creating your life balance. Rate each of these areas of your life from 1 to 10 (1 being low and 10 being awesome) and color in your wheel accordingly. This exercise will clearly show you the areas in your life that need attention. This is a great exercise to do quarterly or even monthly as your year progresses.



This Time Next Year Exercise

Answer these questions to help you plan the year in advance.

1. What big achievements do you want to celebrate this time next year?
2. What do you want to be known for in your business/industry/community?
3. Describe what a typical work day looks like and how you want to feel?
4. What is a game-changing goal you want to go for?
5. What events will you attend to expand your reach and create new connections?
6. How many new people will you welcome to your community? (email lists, social media, mentors)
7. What will be your gross revenues for the year?
8. How much will you pay yourself in the year ahead?
9. What types of new products or services will you offer?
10. What email campaigns/shows/marketing promotions will you launch?
11. What business partners will you make this year?
12. What area of your business do you want to pay more attention to?
13. Do you want to speak (virtual or live) to grow your business?
14. What new professional skills do you want to learn this year?
15. What support team will you put into place this year?
16. What mentors and coaches will you work with this year? For what goal?
17. What systems or procedures will implement this year?
18. Did you add any new sales channels this year?

Awesome Plans by Month

January

February

March

April

May

June

July

August

September

October

November

December

Vision Overview

Hopefully by this page you are not feeling overwhelmed, but that's easy to do when planning out a year. Here are some more questions to ask yourself based on the answers and goals created above. This may change some of your plans based on the answers given below.

1. Does it feel fun?
2. Does it give you an opportunity to grow?
3. Is it aligned with your core values?
4. Will it move you toward your vision?
5. Is the opportunity cost worth the gain?
6. Do you have the capacity to execute this without depleting your spirit?
7. Does this excite you or scare you?

Once you have answered these questions and reflected on the goals set above, fill in the sheets below and use as tools, daily, weekly, monthly to help you stay on track and create an amazing year for yourself.

One Page Strategic Plan Template

Goal Outline

Current Situation EOY 2022	GAP	Desired Situation EOY 2023
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2026 - 3 Year Goals	2028 - 5 Year Goals	2033 - 10 Year Goals
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2022 Challenges	2023 Focus
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Define Quarterly Priorities/Goals - Quarterly Priority Manager

	Q1 - Jan. to March	Q2 - April to June	Q3 - July to Sept.	Q4 - Oct. to Dec.
1.				
2.				
3.				
4.				
5.				

Quarterly Goal Steps Weekly Overview - Q1 13 Week Race

Week	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					

Quarterly Goal Steps Weekly Overview - Q2 13 Week Race

Week	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					

Quarterly Goal Steps Weekly Overview - Q3 13 Week Race

Week	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					

Quarterly Goal Steps Weekly Overview - Q4 13 Week Race

Week	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					

Weekly To Do List:

Week of: / /

Monday	Notes:
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

Top 3 Things to Accomplish This Week:
