



# Forcing Function

## **Annual Review Worksheets**

# Instructions

## Follow these steps to maximize your review time:

**1. Make the time.**

You'll need at least three hours to do this right. I recommend taking a break between each of the four parts.

**2. Before you start, identify or re-identify your Top Values.**

Our digital worksheet is [available here](#).

**3. Create space for magic.**

Get away from your desk to a quiet location without distractions. Immerse in nature if possible. Leave your devices at home.

**4. Go analog.**

Write, don't type. Print out these pages and write in the space provided or respond to the questions in a notebook.

**5. Keep the pen moving.**

Set a timer for each section and keep writing until the timer goes off.

**6. Treat this as a brainstorm.**

Write anything that comes up without judging it. You can select the best course of action afterward.

**7. Refer back to your Goal Statements throughout the year.**

Post them somewhere visible. The more you keep your goals top of mind, the more opportunities you will see to move them forward.



# Deconstructing Success

## Part 1

*5 minutes for each section, 20 minutes total*

### **Career**

What went well this year? Why?

What was better than expected?

What did I learn?

### **Relationships**

What went well this year? Why?

What was better than expected?

What did I learn?



# Deconstructing Success

## Part 1 cont'd *5 minutes for each section*

### Health

What went well this year? Why?

What was better than expected?

What did I learn?

**Other area of importance:** \_\_\_\_\_

What went well this year? Why?

What was better than expected?

What did I learn?



# Deconstructing Success

## Part 2

*5 minutes for each section, 30 minutes total*

**What am I most proud of from last year?**

How did I make these happen?

**What are the best ways I spent my time?**

How could I invest more time in these activities?



# Deconstructing Success

**Part 2 cont'd** *5 minutes for each section, 30 minutes total*

**When I performed at my best, what was usually true?**

What habits or systems most accounted for my success?

**What brought me the most happiness?**

How can I make these happen more often?



# Deconstructing Success

## Part 2 cont'd *5 minutes for each section*

**Which people had the most impact on me?**

How could I see and collaborate with them more?

**What am I most excited about right now?**



# Distilling Lessons

## Part 1

*5 minutes for each section, 20 minutes total*

### **Career**

What didn't go so well this year? Why?

What was not as good as expected?

What did I learn?

### **Relationships**

What didn't go so well this year? Why?

What was not as good as expected?

What did I learn?





# Distilling Lessons

## Part 1 cont'd *5 minutes for each section*

### Health

What didn't go so well this year? Why?

What was not as good as expected?

What did I learn?

**Other (same area as pg. 4):** \_\_\_\_\_

What didn't go so well this year? Why?

What was not as good as expected?

What did I learn?



# Distilling Lessons

## Part 2

*5 minutes for each section, 30 minutes total*

**What did I expect to accomplish, but didn't?**

What could I have done differently?

**What are the least valuable ways I spent my time?**

How could I shift to better uses of my time?



# Distilling Lessons

**Part 2 cont'd** *5 minutes for each section, 30 minutes total*

**When I didn't perform at my best, what was usually true?**

How can I make my environment more supportive of my goals?

**What was I most worried about?**

What could I do now to address these?



# Distilling Lessons

## Part 2 cont'd *5 minutes for each section*

**How did my goals and priorities shift last year?**

How does this change my plans for the future?

**Knowing what I know now, what advice would I give to myself?**



# Annual Vision

*5 minutes for each section, 60 minutes total.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**What is my driving purpose?**

**What am I creating?**



# Annual Vision cont'd

*5 minutes for each section, 60 minutes total.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**What is my impact?**

**What type of person am I?**



# Annual Vision cont'd

*5 minutes for each section.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**What are my three most important values?**

What does it look like to live in alignment with these values?

**What am I fully committed to?**



# Annual Vision cont'd

*5 minutes for each section.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**What am I moving towards?**

What am I moving away from?

**How am I prioritizing my physical health?**

How am I prioritizing my mental health?





# Annual Vision cont'd

*5 minutes for each section.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**How do I show up in my relationships?**

**Who is having the most impact on me?**



# Annual Vision cont'd

*5 minutes for each section.*

*Imagine you are answering these questions one year from now, in your ideal state. Write in present tense ("I am," not "I will be").*

**What does a good day look like?**

**What did I accomplish?**



# Goal Brainstorm: Career

*5 minutes for each, 20 minutes total. Use these prompts to brainstorm.*

## **Purpose (WHAT)**

What is my most important goal for the next year?

What will success look like? (How will I know if I have succeeded?)

## **Payoff (WHY)**

What does achieving this goal unlock for me? (Why is it important?)

## **Plan (HOW)**

Let's say I achieved this goal. What does an average day look like?

What could I do now to improve my odds of success?

## **Progress (WHEN)**

How am I tracking progress toward achieving this goal?

What will I have accomplished by these milestones?

Q1 (Date:   /   /   )

Q2 (Date:   /   /   )

Q3 (Date:   /   /   )



# Goal Framing: Career

*5 mins total. Replace the text in brackets to frame your goal statement.*

## **Purpose (WHAT)**

By [taking action], I expect to [achieve outcome].

## **Payoff (WHY)**

Achieving this means [importance].

## **Plan (HOW)**

If I see [measurement], I know I'm making progress.

## **Progress (WHEN)**

My next milestone is [outcome] by [date].



# Goal Brainstorm: Relationships

*5 minutes for each, 20 minutes total. Use these prompts to brainstorm.*

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By [taking action], I expect to [achieve outcome].

## **Payoff (WHY)**

Achieving this means [importance].

## **Plan (HOW)**

If I see [measurement], I know I'm making progress.

## **Progress (WHEN)**

My next milestone is [outcome] by [date].



# Goal Brainstorm: Health

*5 minutes for each, 20 minutes total. Use these prompts to brainstorm.*

## **Purpose (WHAT)**

What is my most important goal for the next year?

What will success look like? (How will I know if I have succeeded?)

## **Payoff (WHY)**

What does achieving this goal unlock for me? (Why is it important?)

## **Plan (HOW)**

Let's say I achieved this goal. What does an average day look like?

What could I do now to improve my odds of success?

## **Progress (WHEN)**

How am I tracking progress toward achieving this goal?

What will I have accomplished by these milestones?

Q1 (Date: / / )

Q2 (Date: / / )

Q3 (Date: / / )



# Goal Framing: Health

*5 mins total. Replace the text in brackets to frame your goal statement.*

## **Purpose (WHAT)**

By [taking action], I expect to [achieve outcome].

## **Payoff (WHY)**

Achieving this means [importance].

## **Plan (HOW)**

If I see [measurement], I know I'm making progress.

## **Progress (WHEN)**

My next milestone is [outcome] by [date].





# Goal Brainstorm: \_\_\_\_\_

*5 minutes for each, 20 minutes total. Use these prompts to brainstorm.*

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# Goal Framing: \_\_\_\_\_

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