



# ANNUAL YEAR IN REVIEW WORKBOOK

WE BELIEVE THAT TO HAVE A PRODUCTIVE  
LIFE AND BUSINESS, FREQUENT REVIEWS OF  
OUR PROCESSES AND GOALS ARE CRITICAL!

ENJOY THIS FREE GIFT FROM US!

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# My Year in Review Workbook

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

A Year in Review is highly recommended for persons to conduct either on a personal goal level or for a Business Review. A Review puts things into perspective and discovers areas that can be improved or deleted in the upcoming year.

## Personal Review Worksheet

### INSTRUCTIONS

Below you can look at different aspects of your **Personal** life such as Health, Family, Fitness, Career, Work-Life Balance, Relationship, Finance and Money, Friendships, Mental Health, Self-Care, Spirituality, Productivity, Focus etc

### WHAT WORKED?

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

### WHAT DID NOT WORK?

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

### WHAT CAN BE IMPROVED?

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

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NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

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## Business Review Worksheet

### INSTRUCTIONS

Below you can look at different aspects of your **Business** such as Business Processes e.g. Invoicing, Email Marketing, Automation; Marketing Strategies, Website, Booking the Sales, Attracting Clients, Business Administration, Stock-taking, Product or Service Offerings, Sales Funnel, Revenues, Money Management, Self-Productivity, Focus, Self-Care for Business, Business Growth

### WHAT WORKED?

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

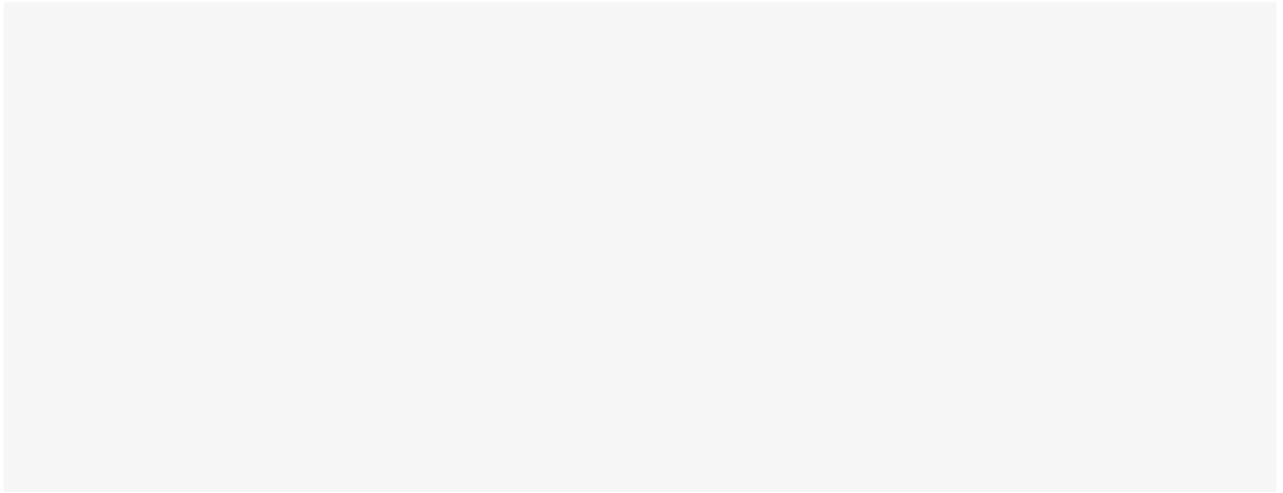
### WHAT DID NOT WORK?

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

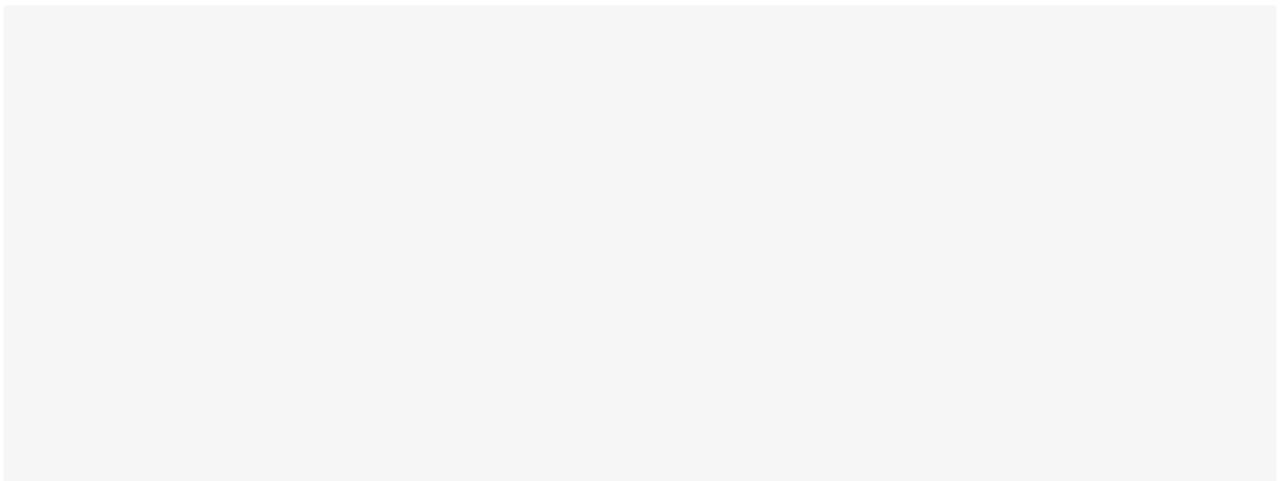
### WHAT CAN BE IMPROVED?

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

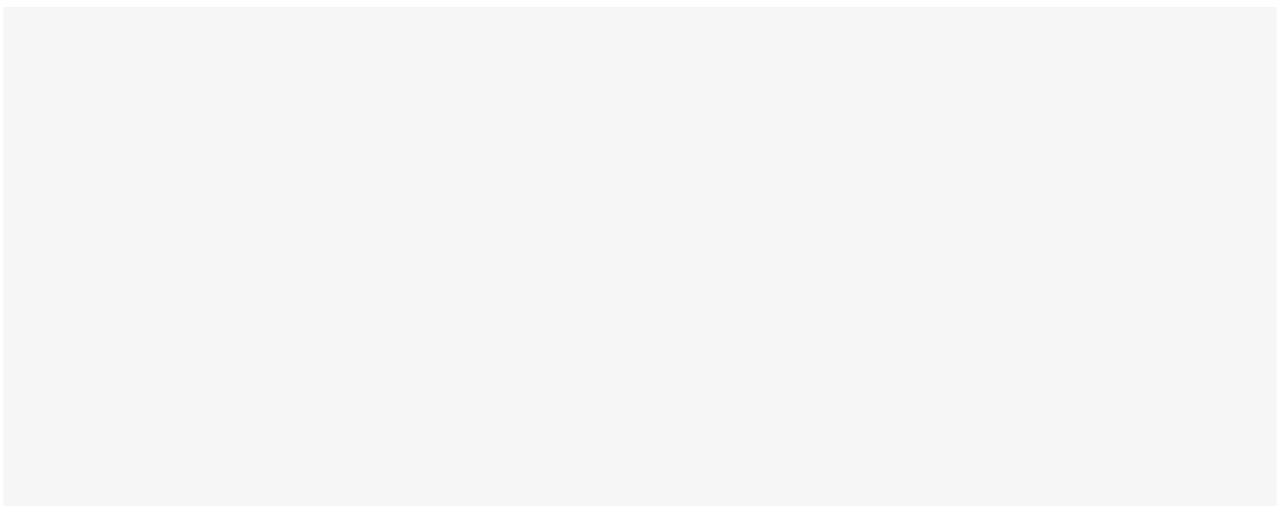
MY BIGGEST LESSONS/LEARNING FROM LAST YEAR WAS:

A large, empty rectangular box with a light gray background, intended for the user to write their biggest lessons or learning from the last year.

MY AREAS FOR SELF-GROWTH & DEVELOPMENT ARE:

A large, empty rectangular box with a light gray background, intended for the user to list their areas for self-growth and development.

I NEED HELP WITH:

A large, empty rectangular box with a light gray background, intended for the user to describe areas where they need help.

# LET'S KICKSTART THE PLAN FOR THE NEW YEAR!

Use the below boxes to kick-start documenting the plan for your business for the Year ahead bearing in mind your Year in Review Assessment:

<b>1</b>	<b>MY IDEAL CLIENT (S)</b>
<hr/>	

<b>4</b>	<b>PRODUCTS/SERVICES</b>
<hr/>	

<b>2</b>	<b>BUSINESS TOOLS</b>
<hr/>	

<b>5</b>	<b>TYPES OF CAMPAIGNS</b>
<hr/>	

<b>3</b>	<b>MY INVESTMENT IN SELF</b>
<hr/>	

<b>6</b>	<b>OTHER</b>
<hr/>	

NAME

DATE





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