



Annual Reset and Planning Workbook

A Year in Review. A Year Designed With Intention.

Introduction

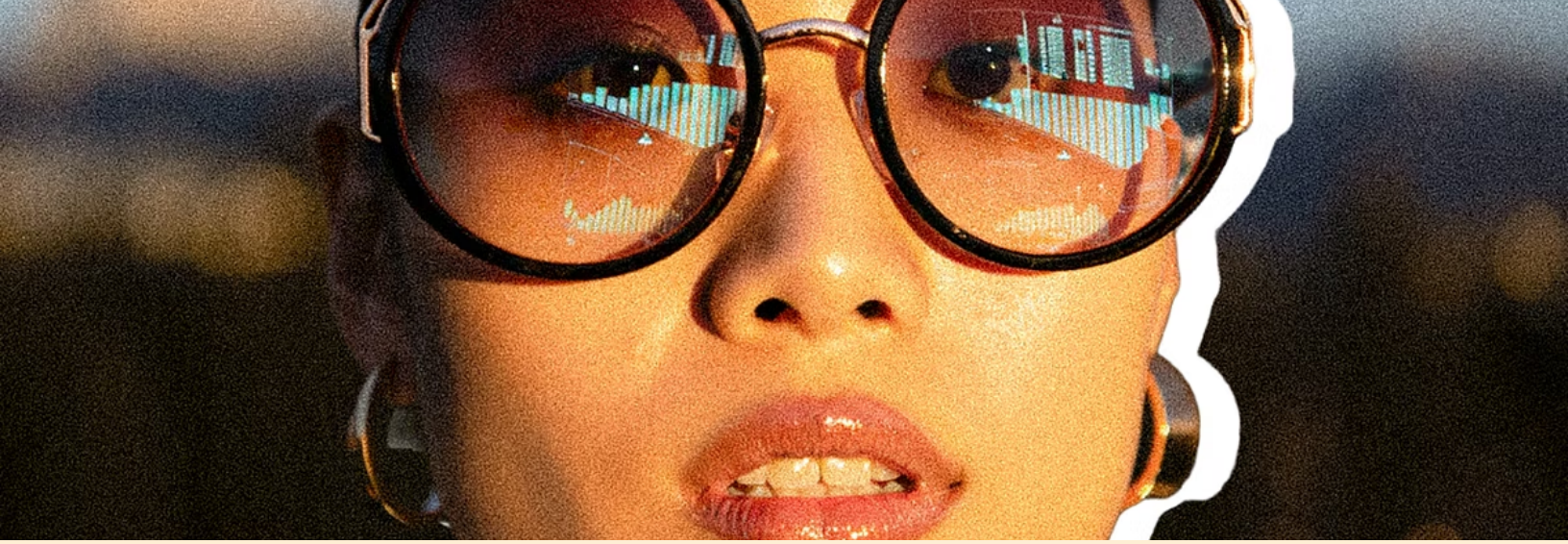
Purpose of this workbook:

- Close the current year with clarity and honesty
- Reconnect to identity, values, and direction
- Design aligned personal and business priorities for the upcoming year
- Create a simple operating system to stay accountable

How to use this workbook:

- Complete in order for maximum impact
- Answer with honesty and specificity
- Block uninterrupted time for each section
- Revisit quarterly to recalibrate and refine





Mindset & Psychology

You don't rise to your goals, you fall to the level of your systems and self-concept.

Reflection Prompts:

- What beliefs about myself shifted this year, positively or negatively?
- When was I most in flow? What triggered it?
- What drained me consistently? Why did I tolerate it?
- What fear or pattern do I finally need to break up with?
- Who or what most shaped my mindset this year, and do I want more of that?

Reset Tools:

- Identity affirmation: "I'm the type of person who ____"
- Mindset scorecard (focus, optimism, resilience, decisiveness)
- Rituals that prime performance (morning, transition, shutdown)

Mindset Scorecard

Assess the four pillars of high-performance thinking: Focus, Optimism, Resilience, Decisiveness.
Score each category from 1 (low) to 5 (high). Be honest. This isn't about judgment, it's about clarity.



Focus

The ability to concentrate on what matters most and block out the rest.

Score 1:	Constantly distracted. Inbox, messages, and fire-fighting drive my day.
Score 2:	I try to focus but often react to urgency over importance.
Score 3:	I block time, but it's inconsistent. Some deep work happens.
Score 4:	I regularly protect deep work and know my top priorities.
Score 5:	I run my day. Ruthless focus. I guard my time like a weapon.



Optimism

The belief that the future can be better and I have the power to make it so.

Score 1:	I'm cynical or exhausted. I expect things to go wrong.
Score 2:	I want to believe, but doubt and fear creep in often.
Score 3:	I stay positive most of the time, especially when things go well.
Score 4:	I lead with hope, confidence, and possibility even in challenge.
Score 5:	I'm a force of optimism. I raise the belief level in others.



Resilience

How quickly and constructively I recover from setbacks or pressure.

Score 1:	I shut down under stress. Setbacks derail my focus.
Score 2:	I recover eventually but often spiral first.
Score 3:	I bounce back, but it takes conscious effort.
Score 4:	I use setbacks as fuel. I recover quickly and grow stronger.
Score 5:	I'm anti-fragile. Adversity sharpens me, not softens me.



Decisiveness

The speed and clarity with which I make decisions and take action.

Score 1:	I overthink everything. I delay or seek too much input.
Score 2:	I waffle. I make decisions, then second-guess them.
Score 3:	I get there, but it takes time. I seek reassurance.
Score 4:	I make decisions quickly with 80% info and adjust if needed.
Score 5:	I'm decisive, strategic, and clear. I move fast and clean.

Your Total Score: ____ / 20

Range 16–20:	Elite mindset. Operating at a leadership level. Refine and protect it.
Range 11–15:	Strong foundation. Some areas may need sharpening.
Range 6–10:	Warning zone. You're leaking performance through mindset.
Range <6:	Time to reset. Seek clarity, support, and a system for change.

Year in Review

A thoughtful look back to extract learning, insight, and data.
Use this page to help inform your answers on the pages that follow.

Personal Reflection

What events or experiences shaped your year.

Prompts:

- What experiences shifted your mindset or identity
- What challenged you and made you stronger
- What expanded your belief in what is possible

Gratitude Integration

Grounding in the present.

Prompts:

- People, experiences, resources, and privileges you are grateful for
- What made this year meaningful

Shortfalls & Self Honesty

What did not get accomplished and why.

Prompts:

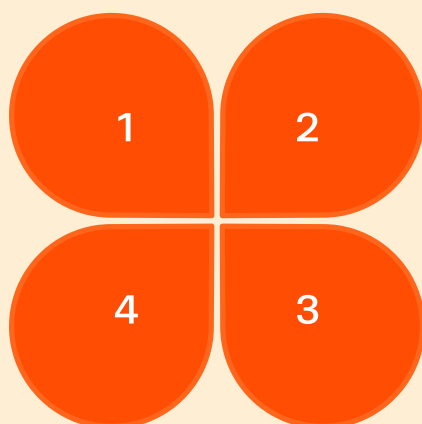
- What goals or intentions were left incomplete
- Why did they fall through
- What personal patterns or behaviours must shift

Accomplishments and Pride

Celebrate what worked.

Prompts:

- Key wins and highlights
- Habits that moved you forward
- Successes across personal, business, community, family





Personal Identity & Legacy

Not what do I want to do, but who do I want to become?

Reflection Prompts:

- What am I most proud of this year, personally?
- Who did I become this year?
- Where did I lead with courage vs. comfort?
- Am I living in alignment with what I say I value?
- What's one thing I want to be known for this time next year?

Reset Tools:

- "Word of the Year" or North Star theme
- Vision/values alignment audit
- Personal legacy exercise (write your bio 1 year in the future)

Youself

Let's start with YOU! What events or experiences during the year have 'changed' your thinking or outlook?

My Experience Was:	It Has Made Me:
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Short Falls

Was there anything on your list to achieve this year (personal or business) that you didn't get to accomplish? Why didn't it happen? What needs to change in order for it to happen next year (if it's still a goal)?

What Didn't Get Accomplished	What Needs to Change In Order to Accomplish This in the Future?
1.	
2.	
3.	
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7.	
8.	
9.	
10.	

The Life Balance Wheel

The Life Balance Wheel is a visual snapshot of how fulfilled and aligned you feel across the major areas of your life. Use it to identify strengths, gaps, and priorities for the year ahead.

1

Rate Each Area

Review each category on the wheel: **Personal & Spiritual Growth, Business/Career, Money, Health, Friends & Family, Love & Romance, Personal Development, Fun & Relaxation.**

Rate your satisfaction in each area on a scale from **1 (very dissatisfied)** to **10 (fully satisfied)**.

Use your intuitive first response. There are no right or wrong scores.

2

Mark Your Scores

Place a dot on the corresponding number for each category.

For example, if your satisfaction with Health is a 7, place a dot on the "7" line in the Health segment.

3

Connect the Dots

Once all eight areas are scored, connect the dots around the circle.

This creates a visual shape of your current life balance.

Smooth, even shapes indicate alignment. Sharp dips show areas needing attention.

4

Identify Gaps and Priorities

Look for segments that are noticeably lower than the others. These are potential areas for growth, support, or intentional change.

Ask yourself:

- **What is contributing to this lower score?**
- **What would a higher score look or feel like?**
- **What small action would move this area forward?**

5

Choose 2 to 3 Focus Areas

Select **two or three categories** where improvement would create the greatest impact on your overall wellbeing.

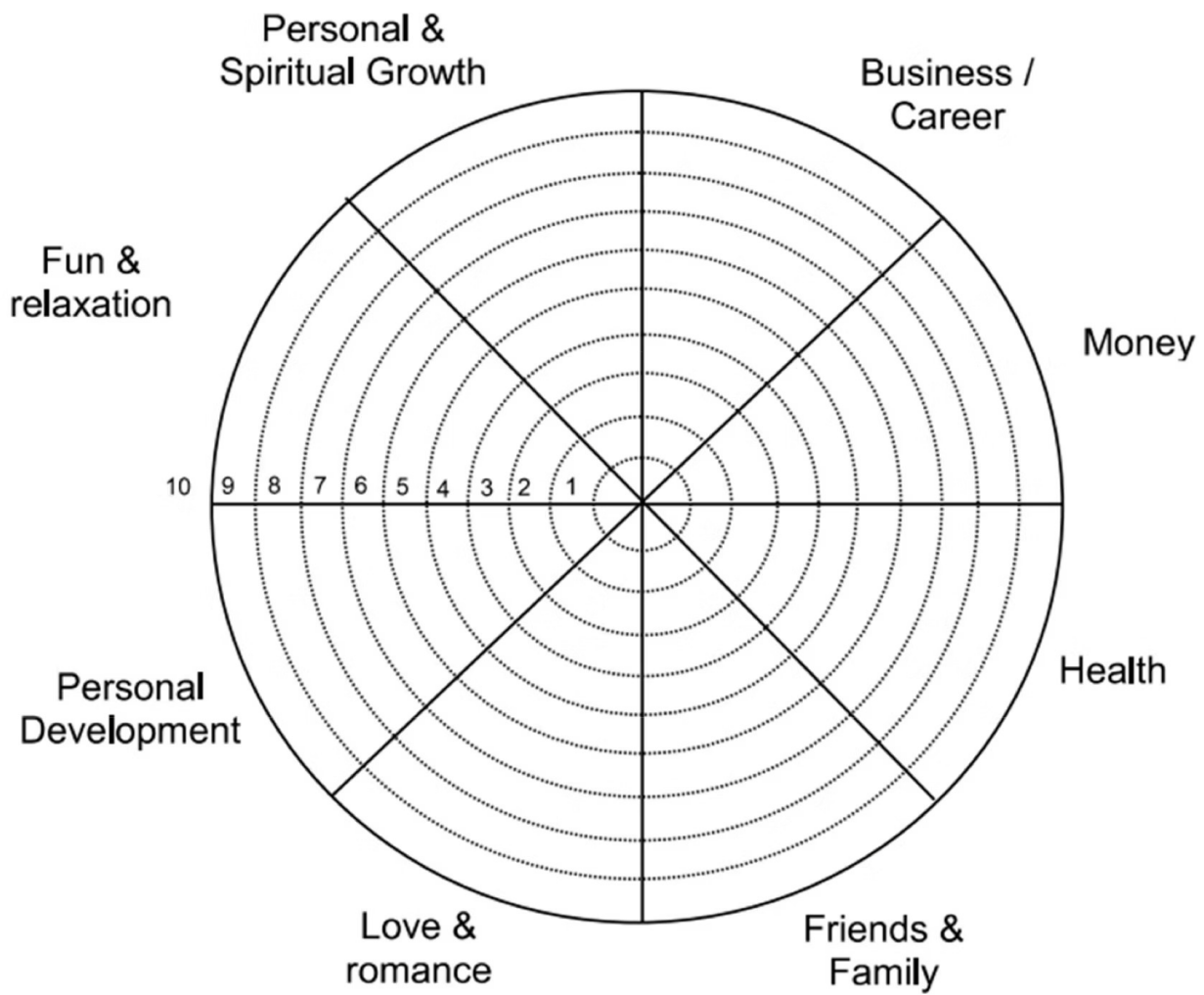
These focus areas can then inform your personal goals and planning for the year.

6

Revisit Quarterly

Use the wheel again every quarter to measure progress and recalibrate.

This tool is most powerful when used consistently to track changes in your life satisfaction and alignment over time.



Accomplishments

Remember to check last year's bucket list for anything you need to "tick off". Take a moment to reflect on what has changed in your business and your life.

What activities and accomplishments best demonstrate the success and progress of your business and your personal life?

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Gratitudes

Between 'reviewing' and 'planning' comes the 'present'. This is where we pause and reflect on what we're grateful for. Expressing gratitude helps us connect with the feeling of success and progress.

Make a list of what you love that's already in your life, big or small!

I'm Grateful For
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.



Fitness, Health, and Energy

Your energy is your edge. Protect it like your P&L.

Reflection Prompts:

- What was the state of my energy, week to week?
- Did I feel strong, mobile, clear, and rested?
- Where did I overtrain, under-recover, or neglect my baseline?
- What health signals did I ignore or address?
- How did my routines (or lack of them) affect performance?

Reset Tools:

- Quarterly bloodwork or performance labs
- Sleep, training, and recovery review
- Baseline fitness test: strength, mobility, endurance
- Daily non-negotiables checklist (sleep hours, hydration, movement, supplements)

5 Questions to Close the Year Powerfully

1

What did I **build** that didn't exist a year ago?

2

What did I **let go of** that was no longer serving me?

3

Who did I **become** in the process?

4

Where am I still **playing small**?

5

What will I no longer tolerate next year?

Visualization – Your “Bucket List”

Every year, it's valuable to look into your future and truly imagine your ideal life. If possible, do this exercise with your spouse or partner. One of my favourite quotes is: “Live the life you imagine; move confidently in the direction of your dreams.”

Let's begin with 40 things you want to accomplish in your lifetime, often referred to as your “Bucket List”. Don't be skeptical; this exercise is important if you plan to experience more joy and fulfilment than you have in the past. If you already have a bucket list, this is your chance to add to it.

My 40 Things to Do or Have “While I Can Still Do Them” List

1.	11.	21.	31.
2.	12.	22.	32.
3.	13.	23.	33.
4.	14.	24.	34.
5.	15.	25.	35.
6.	16.	26.	36.
7.	17.	27.	37.
8.	18.	28.	38.
9.	19.	29.	39.
10.	20.	30.	40.

Vision & Values Alignment Audit

Are you living what you say you stand for? Vision without alignment is just noise. Values without behavior are just words.

- Section 1: Current Vision Snapshot

Get clear on where you're going before you assess how aligned you are.

What is your current 3–5 year vision for your life and business?

What does "winning" look like for you next year (revenue, health, family, lifestyle, time freedom, etc.)?

What's your "why" behind this vision? Who benefits if you win? Why does it matter?

- Section 2: Stated Values

These are the principles you say matter most.

List your top 5 personal values (e.g., Integrity, Freedom, Family, Mastery, Adventure).

List your top 5 business or leadership values (e.g., Excellence, Accountability, Clarity, Innovation, Fun).	
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• Section 3: Alignment Scorecard

Score yourself honestly on how well your behaviour and choices reflect your values across these domains.

Scoring Key:

- 10 = Fully aligned
- 7–9 = Mostly aligned
- 4–6 = Inconsistent, needs attention
- 1–3 = Misaligned or neglected

Domain	Value-in-Action Example	Score (1–10)	Notes
Time	Do your calendar and time blocks reflect your values?		
Team	Do you hire, delegate, and lead in line with your values?		
Clients	Do your client relationships reflect mutual respect and fit?		
Money	Do you earn, spend, and invest in ways aligned with your values?		
Health	Do you make decisions that honour energy and longevity?		
Communication	Do you speak and show up with authenticity and clarity?		
Product/Service	Does your work deliver what your values promise?		

- **Section 4: Pattern Reflection**

What 1–2 areas are most misaligned and why?

Where are you out of integrity with your stated values, and what's the cost?

Where are you most aligned, and what's the reward?

What's one value you need to re-commit to this year?

What's one new non-negotiable habit or decision that would bring you back into alignment?

- **Section 5: Alignment Commitments**

Use these prompts to create a personal operating system for next quarter or year.

Value I am re-committing to:

Behaviour that will reflect it daily or weekly:

One "No" that protects it:

One environment upgrade that supports it:

How I will track it:



Personal Goals

Now it's time to list some non-business, personal goals. Choose one personal goal for each month and write it below. Be specific.

For example, if your goal is to begin exercising or meditating, outline the exact daily habit you will commit to.

January – Go for a 30-minute walk after work daily

February – Meditate for 10 minutes every morning.

March – Sign up for guitar lessons.

If you would like support in your personal life in the areas of performance mindset, stress reduction, burnout prevention, health, fitness, relationships, or work-life balance, you can book a complimentary discovery call with Tracey Delfs, Action Edge's Performance Mindset Coach at tracey@aeednow.com.

Examples of Personal Goals You May Choose From:

- Fitness or weight-related goals
- Start a new hobby
- Debt reduction or investing
- Focus on reducing stress (e.g., begin a meditation routine)
- Prioritize family time – plan a couple of fun family outings this month
- Plan a holiday – where, when, budget
- Home renovations
- Improve your relationship with your spouse or partner (e.g., weekly date night)
- Spend more time with friends
- Personal growth – sign up for a course, program, or workshop
- Community involvement or volunteering
- Spend more time in nature
- Declutter or organize your home
- Start a positive morning routine
- Prioritize sleep hygiene (e.g., commit to going to bed earlier)

Personal Goals for the Year

January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Wealth & Net Worth

Wealth is the ability to fully control your time, money, and decisions.

Reflection Prompts:

- What is my current net worth? Is it growing in line with my ambition?
- How many income streams did I build or strengthen this year?
- Did I spend money in ways that aligned with my values or just convenience?
- Where did I take smart risks? Where did I play too small?
- What investments (time or money) had the greatest ROI?

Reset Tools:

- Personal balance sheet (assets/liabilities)
- Income stream audit
- Wealth goal worksheet: passive income, investment targets, future lifestyle cost

Financial Operations

Cash is the oxygen of freedom. Systems create safety.

Reflection Prompts:

- Did I run my personal and business finances proactively or reactively?
- Where did I lose money due to sloppiness, delay, or inattention?
- Are my books, taxes, and structures optimized for the next 10 years or the next 10 days?
- Am I spending like a CEO or a technician?

Reset Tools:

- Profit allocation and cash flow forecast
- Tax strategy review
- Compensation plan (salary, dividends, profit shares, etc.)
- Year-end financial dashboard (personal + business)

Business Goals

Now, make a list of all the key projects you want to achieve in your business. These are not the routine tasks or end results, but the larger initiatives, strategies, and actions that will lead to meaningful outcomes.

Business Goals for the Year	
1.	
2.	
3.	
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Team, Leadership, and Delegation

If you're still doing it all, you don't have a team, you have help.

Reflection Prompts:

- Who on my team got stronger this year?
Who is stuck?
- What responsibilities am I still clinging to out of habit or ego?
- Did I lead with clarity, consistency, and decisiveness?
- What % of my time was spent in my zone of genius vs. firefighting?
- Who do I need to hire, promote, develop, or part ways with?

Reset Tools:

- Team health check (performance, fit, communication, trust)
- Org chart for the future: "Org chart of what I want to be doing"
- Delegation grid (keep, delete, delegate, automate)
- Feedback loops (Did they hear me? Did I listen back?)



Rewards

Now it's time to define your rewards. Write down the projects or goals you want to reward yourself for, then add the reward you'll earn once completed.

Be disciplined here, if the goal isn't achieved, the reward doesn't happen!

Project/Goal	Reward for Completion
1.	
2.	
3.	
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Commitment Statement

I am choosing to step into this year with clarity, intention and personal responsibility. I am committed to showing up for myself and the goals I have set with focus, honesty and follow through.

I will stay aware of the moments when I slip into avoidance, distraction or doubt. When that happens, I will pause, reconnect with what matters, and choose the actions that support my long term growth and wellbeing. I will keep moving, even when the next step feels uncomfortable, inconvenient or slower than I hoped.

When things do not go as planned, I will meet myself with honesty instead of blame. I will ask, "What can I learn here, and what will I do differently next time?" I will adjust with intention and continue forward without abandoning my goals.

I will invest my time, energy, relationships, resources and knowledge into what I want to build. I will acknowledge my progress and celebrate the moments when I honour my commitments, because those moments shape the identity I am creating.

I welcome support from the people who care about me. I give them permission to hold me accountable in a kind, honest and encouraging way, so I can stay aligned with who I want to be and what I said I would do.

Signed: _____

Date: _____

