

Yearly Review

YEAR _____

TOP ACCOMPLISHMENTS

○	
○	
○	
○	
○	
○	

WHAT WERE THE THINGS YOU WERE MOST AFRAID OF?

SETBACKS OR ROADBLOCKS

THINGS TO LEARN

THINGS TO CHANGE

START

STOP

CONTINUE

THINGS I DIDN'T GET DONE, BUT STILL NEED TO DO

○	
○	
○	
○	
○	
○	

PERSONAL CORE VALUES

What would I like to change spiritually in my life?

What are my physical health goals?

What relationships would you like to improve? (ex. people, money, food)

How will you enhance your brand? What will people say about you when you're not around?

What do you plan to do for your personal enjoyment?

GROWTH STRATEGY

MARKET FOCUS AND CUSTOMER PROFILING

Market Expansion	Pain Points	Niche Identification	Behavioral Analysis

SALES BLUEPRINT

Value Proposition
Retention Tactics
Funnel Improvement
Competitor Analysis

LEAD DEVELOPMENT

Digital Outreach
Referral Program
Lead Nurturing
Cold Calling

REVENUE TARGETS AND PERFORMANCE BENCHMARKS

Sales Forecast	Stretch Goals	Milestone Setting	Salesperson Performance Metrics