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**PLAN YOUR YEAR**

23

**THE FOCUS COURSE**

*May you wake up on  
January 1st and go to  
bed on December 31st,  
and in between do what  
is in your heart to do.*

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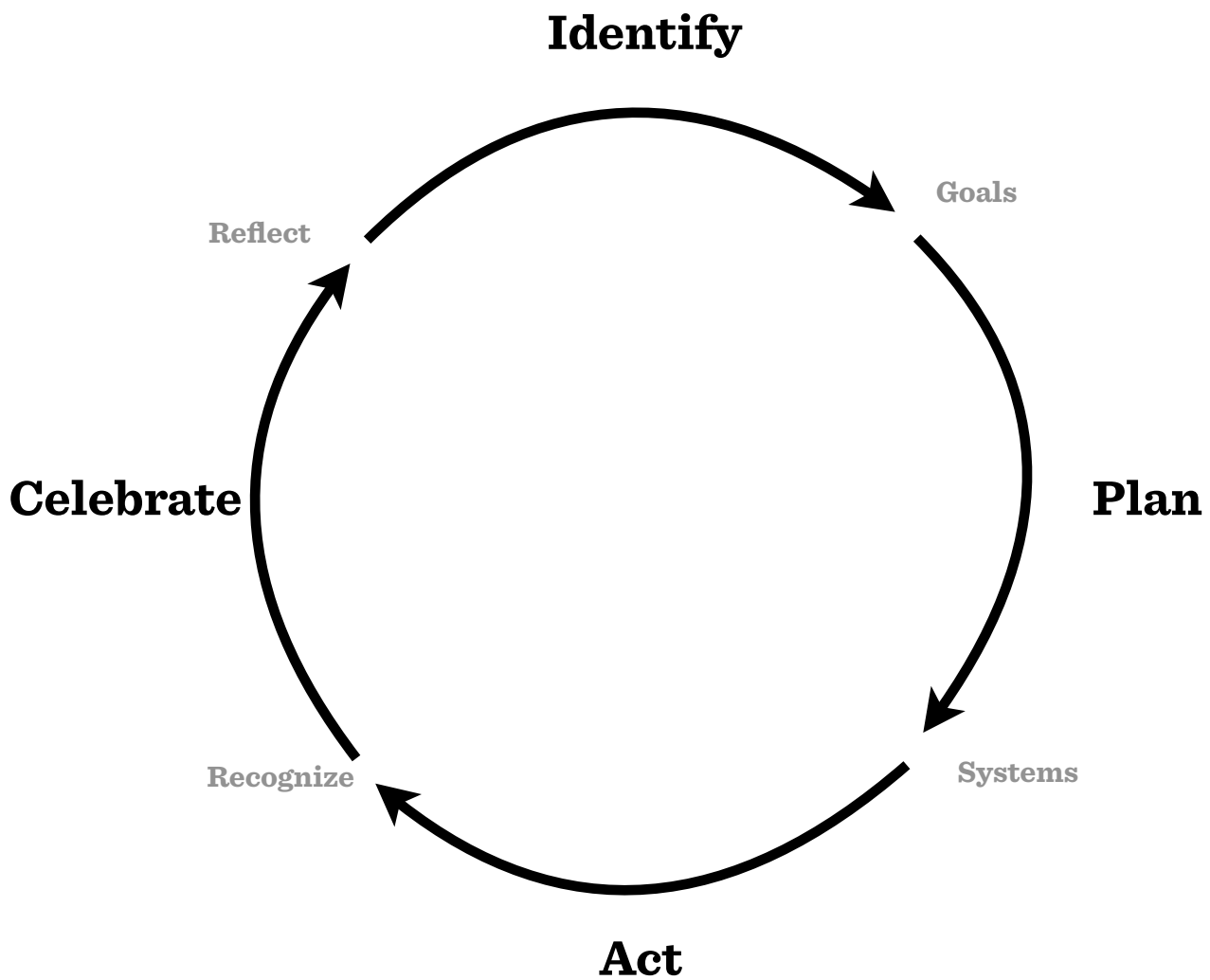
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# The 4-Focus Method

A Flywheel for *Living a Focused Life*



## 1: Identify

Many people struggle to identify that which matters because they lack clarity about the bigger picture of their life's mission and vision. ("People perish with lack of vision.")

## 2: Plan

When you have identified what is important, you must set aside time for it. Otherwise all you have is a wish or a hope that gets no traction in your life.

## 3: Act

This is where you do that which you said you would do. It will naturally include your tasks and actions, but it also includes things such as meaningful moments with your family, resting and recharging, and more.

## 4: Celebrate

When you've done that which you set out to do, that is cause for celebration! Reinforce your positive actions and recognize that you've just done something that matters.

.....

The Plan Your Year Workbook takes you through with the flywheel steps 4, 1, and 2. You will be **Celebrating** what you did last year, and then **identifying** and **planning** for what you want to do in the upcoming year.

The Focus Course Digital Planner helps you with step 3: **Act**.



Note: I (Shawn) have a workshop that walks through all the details of our 4-Focus Method. If you're interested, you can get the replay of that Productivity Power Hour on our training page if you go to [thesweetsetup.com/training](https://thesweetsetup.com/training).

# How to Plan Your Year

The process in this workbook will guide you through part of our 4-Focus Method.

You will **reflect and celebrate** upon last year, **identify** themes and goals for this upcoming year, and **plan** ways to accomplish your goals and walk out your theme for 2023.

## 1: Everyone gets their own copy of the workbook

This workbook is something you can do on your own or with your spouse / partner / family / group of friends. We suggest printing a copy for everyone. (I like to get a spiral-bound version from a local office supply store.) Alternatively, loading the PDF up on your iPad or computer is totally fine as well.

## 2: What you'll need...

1. Somewhere comfortable to sit.
2. Your copy of the workbook. (You're reading it now! So: *check!*)
3. The accompanying walkthrough videos on our website.
4. Access to your calendar of events from last year (if possible).
5. Access to a calendar of events for this upcoming year (if possible).
6. Your copy of last year's Plan Your Year workbook (if you have it).
7. Some background music to lighten the atmosphere and bring the vibes.
8. Your drinks and snacks of choice to make it fun!

## 3: The Process

The Plan Your Year process takes about 3 hours. Some folks do it a bit quicker, others a bit slower. You may also just need a break, which is great. We find that most folks like to set aside one or two evenings to go through it. But, if you can't get large chunks of time then don't worry — you can do each section on its own and in your own time.

There is no right or wrong time or way to go through this workbook. While it is clearly targeted with the New Year in mind, you can go through it any time you want. We know of folks who have waited to go through it in the summer, or who have even gone through it again in the summer to re-align their year.

Now, do you have that drink of choice? (It doesn't matter if its hot tea, water, fussy whiskey, or a glass of wine.)

Before you begin, please raise your glass...

*Cheers! To you and a wonderful 2023!*

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**CELEBRATE  
& REFLECT**

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## SECTION 1: Highlights, Wins, and Accomplishments From 2022

15 - 20 MINUTES

This is an opportunity to look back and celebrate how far you've come this year and to be grateful.

### EXAMPLES

- Completed a semester or two of school.
- Took a course to learn a new hobby.
- Paid off student loans.
- My spouse started a new job.
- My oldest daughter began third grade.
- Read some fiction and non-fiction books.
- Went on a family vacation.
- Made some new business relationships.
- Celebrated our anniversary.
- Began exercising regularly and eating healthier.

Use the following prompts to reflect on everything you and your friends / family did.

*Tip: You don't need to feel pressure to fill in every single box and every single prompt.*

**In 2022, I learned...**

**A highlight from the year was...**

**In 2022, I celebrated...**



**A relationship that meant the most to me in 2022 was with...**

**A special meal I got to share in 2022 was...**

**Something new I tried in 2022 was...**

**Last year, I was able to travel to...**

**I made progress in...**

**A new habit or routine that I started in 2022...**

**Something I changed in 2022 was...**

**A theme or two that seemed to repeat itself all throughout 2022 was...**

## SECTION 2: *Challenges, Setbacks, and Frustrations*

10 MINUTES

Identifying your disappointments and frustrations is helpful because you can learn from them.

By giving yourself an opportunity to reflect and acknowledge the setbacks and frustrations from the past year, you can learn and use that wisdom as an opportunity to grow.

Use the prompts below to reflect on the previous year and make note of the challenges you faced.

**A disappointment from 2022 was...**

**During 2022 I wish I would have ...**

**I wish I would have started doing...**

**I wish I would have spent LESS time...**

**I wish I would have spent more time...**

**I wish I would have kept doing...**

## SECTION 3: *Life Assessment*

10 MINUTES

You have six primary areas of life. For this section we're now going to take a brief look at each of those areas.

### **1: Career**

The trajectory and legacy of your life's work; your vocation. Naturally, the specifics of your job description will change throughout your career; you may have more than one job active right now; and/or you may also have a side-hustle or other type of vocational hobby.

### **2: Relationships**

For relationships, this also can be subdivided into additional areas: your spouse / significant other; your children; your family; your friends; et al. This is the social domain of your life. We also know that different relationships are stronger than others or more important than others.

### **3: Physical Health**

This is your physical body: your health, your strength, your physical energy.

### **4: Inner Personal Life**

The part of you that is connected to a higher power, a sense of purpose and destiny. This area of your life can also be subdivided into: (1) your emotional health; (2) your mental health; and (3) your spiritual life. Each of these stands on its own as being important, and each of them play a critical role in who we are.

### **5: Finances**

This area of life is more than just your budget, your bank accounts, etc. It also makes up the items and things which you own and /or the things you are responsible for maintaining.

### **6: Rest & Recreation**

This is perhaps one of the most neglected areas of our lives. There is much overlap here with how rest impacts our physical health, our inner-personal life, our relationships, and more. True rest is something that leaves us feeling recharged and rejuvenated. And, thus, it is often something which requires a bit of energy (believe it or not). Similarly to how you spend time on, in, and thinking about your vocation so too should you spend time on, in, and thinking about rest and recreation.

. . . . .

On the following page, for each area listed, circle the "score" or "rating" that you would self-assess for that area of your life.

- A low score of 1 indicates that you're in a crisis in that area and things are not going well at all.
- A high score of 5 reflects that you're doing the best you can (all things considered) with a clear focus and successful results in that area.
- **Tip:** Try to move through quickly and trust your gut reaction for each score. Don't overthink or over-analyze.

## CAREER

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*My job and career is in bad shape. I have little or no energy to show up, and I definitely am not able to bring my best to work. I feel stuck, lost, and have no clear path forward to grow in my career and do my best work.*

*I am in my "zone of genius" and have much to offer the work-place, as well as our customers and clients. I am excited about work, yet it does not dominate my entire life; there are healthy boundaries so that I do not constantly bring work home with me.*

## RELATIONSHIPS

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*I have very little time or energy for the relationships in my life. I don't know how or what to do in order to improve the relationships in my life, nor am I building new relationships.*

*I am clear about the most important roles and relationships in my life. I am able to show up for those people — giving my best to serve and love them. Moreover, there is a clear reciprocity with my most important relationships and we are growing together.*

## INNER PERSONAL LIFE

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*I have not spent any time recently engaging my inner life, and have no sense of being connected to something greater than myself. I feel emotionally drained, overwhelmed, and mentally foggy.*

*I regularly spend time practicing and developing my spiritual life. I feel a daily and moment by moment connection to my purpose and place in the world. My mind and emotions feel strong and positive.*

## PHYSICAL HEALTH

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*In recent weeks I have given no regard to caring for my physical body. I eat whatever is most convenient in the moment, and do not physically exert myself more than is needed day to day. Sleep is necessary but not prioritized.*

*I have ritualized and optimized ways of consistently taking care of my body in my eating habits, exercise routines, and sleep hygiene. I am constantly finding ways to improve my physical well being and others often seek me out for my input on the matter.*

## REST, RECREATION, & RECOVERY TIME

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*I have little interest in any hobbies or down time. I find that I am overwhelmed with work and other outside expectations and urgent issues. Sleep is a luxury that I simply don't have time for.*

*I have done the hard work to prioritize my health, foster my interests, and keep healthy boundaries around my personal time so I can be rested. I regularly carve out time for the activities that I love and energize me.*

## FINANCES

NOT GOOD...

AMAZING!

1	2	3	4	5
---	---	---	---	---

*I have a significant amount of debt. I struggle to live within my means, and I tend to make irrational financial decisions.*

*I have a budget that I keep, and I live within my means. I am on track with my financial goals and do not stress or worry about money.*

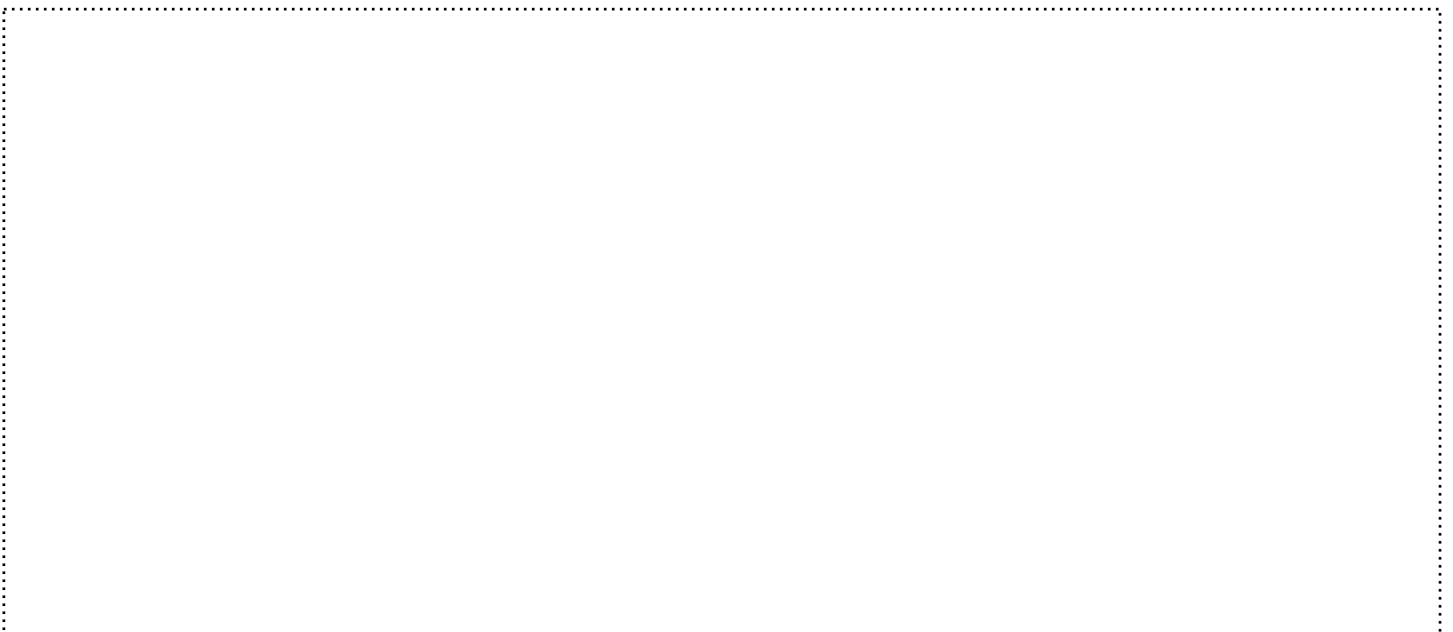
The area of my life I gave the **highest score** to was: \_\_\_\_\_.

Why do I think that is?



The area of my life I gave the **lowest score** to was: \_\_\_\_\_.

Why do I think that is?



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**IDENTIFY**

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## SECTION 4: Known Events and Milestones Happening in 2023

30 MINUTES

In the spaces below, list out anything significant that you know is going to happen and when. We start with this because it's easiest to begin with what we already know. (Note that on page 19 there is a spot for you to list *known events* that still have *unknown dates*.)

EXAMPLES		
Birthdays	Holidays	School Breaks
Graduations	Business Trips	Special Occasions
Anniversaries	Family Trips / Vacations	Weddings

### JANUARY 2023

### FEBRUARY

### MARCH

### APRIL

**MAY**

**JUNE**

**JULY**

**AUGUST**

**SEPTEMBER**

**OCTOBER**

**NOVEMBER**

**DECEMBER**

**KNOWN EVENTS, BUT WITH UNKNOWN DATES**

**EXAMPLES**

Visiting family in Colorado sometime in the summer.	Family camping trip in the spring or fall.
Landscaping the backyard before it gets too hot.	Garage sale.

## SECTION 5: *Dream Big! Events and projects you may want to do in 2023.*

15 MINUTES

Let's dream! Imagine. Do some blue sky thinking. What vacations, trips, home projects, work projects, classes, and/or family events do you may want to do in the upcoming year?

Focus only on *events* and *projects* — things with a start/stop date and a budget. You will get to goals in the next section.

Don't worry about keeping this list "reasonable". Just list out every event and project that comes to mind. Dream big!

### EXAMPLES

- Ski trip to the mountains
- Anniversary weekend getaway
- Paint the basement
- Clean and organize the garage
- Road trip to the beach
- Volunteer for a day at a non-profit
- Attend work conference in Austin
- Host a neighborhood cookout
- Visit friends in Atlanta
- Moving to new city / house

Use the prompts below to help you think about any events or projects you may want to do this year.

**Something fun that I'd like to do in 2023...**

**Something I really enjoyed last year, that I would like to do again...**

**For my home, something that's important to me is....**

**All the people I would love to go visit / get together with...**

**What are some special milestones this year? How will I celebrate?**

**In 2023, a place I would love to visit is...**

**An upcoming life transition happening in 2023?**

**In order to make space for important projects, here are a few things I will NOT do in 2023...**

Do you have any overarching themes, critical projects, or other single, most-important areas of responsibility that emerge during different seasons? For our family, the themes in Spring and Fall are usually “Soccer”. The theme of Summer is usually “Travel,” and the theme of winter is usually “Rest.”

**SPRING THEME**

**SUMMER THEME**

**FALL THEME**

**WINTER THEME**

For any additional goals and projects, fill out the sections below to help you get clear on the project scope.

<b>Project / Event:</b>					
Budget		Timeframe			Length
\$   \$\$   \$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

<b>Project / Event:</b>					
Budget		Timeframe			Length
\$   \$\$   \$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

<b>Project / Event:</b>					
Budget		Timeframe			Length
\$   \$\$   \$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

<b>Project / Event:</b>					
Budget		Timeframe			Length
\$   \$\$   \$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

<b>Project / Event:</b>					
Budget		Timeframe			Length
\$   \$\$   \$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

Project / Event:							
Budget			Timeframe				Length
\$	\$\$	\$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

Project / Event:							
Budget			Timeframe				Length
\$	\$\$	\$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

Project / Event:							
Budget			Timeframe				Length
\$	\$ \$	\$ \$ \$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

Project / Event:							
Budget			Timeframe				Length
\$	\$\$	\$\$\$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month

Project / Event:							
Budget			Timeframe				Length
\$	\$ \$	\$ \$ \$	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	one day one week one month



## SECTION 6: Dream Big! Goals and Desired Outcomes for Next Year.

25 MINUTES

On the following pages, list out all the goals, hopes, and desired outcomes you have for 2023.

- Do you want to increase your financial investing?
- Do you want to build a new habit?
- Do you want to learn a new skill?
- Etc...

### Basically: **What change do you want to see in your life in 2023?**

The aim of this section is to get everything on the table. Later in the workbook you will cut down your list of goals to something more manageable and decide which ones you will actually do. For now, start by listing out where you'd like to see progress or change.

*Note: You may end up wanting to list some items from the previous list of events and project on here — and vice versa. That's fine. These worksheets are meant to help you get everything down on paper. Overlap is okay. Just list it however it makes sense for you.*

Use any of the following questions to help you identify goals and desired outcomes you have for the upcoming year. If any question is irrelevant or you don't have an answer, just skip it!

For my small business I want to do more things that scale and less day-to-day tasks.

For my \_\_\_\_\_ I want to do more \_\_\_\_\_ and less \_\_\_\_\_.

(examples: For my marriage, mornings, free time, eating, church, workouts, spending, saving, job, hobby, etc....)

For my \_\_\_\_\_ I want to do more \_\_\_\_\_ and less \_\_\_\_\_.

Something I feel anxious about for next year is \_\_\_\_\_.

I want to \_\_\_\_\_.

In 2023, \_\_\_\_\_ is very important to me. So I am going to \_\_\_\_\_.

*When I feel stressed, instead of \_\_\_\_\_, I am going to \_\_\_\_\_.*

*Something that is important to my spouse / significant other is \_\_\_\_\_.*

*Something that is important to my kid(s) is \_\_\_\_\_.*

*At the end of 2023, I will consider it a win for my \_\_\_\_\_*  
(area of life)

*if I have \_\_\_\_\_.*

*At the end of 2023, I will consider it a win for my \_\_\_\_\_*  
(area of life)

*if I have \_\_\_\_\_.*

*At the end of 2023, I will consider it a win for my \_\_\_\_\_*  
(area of life)

*if I have \_\_\_\_\_.*

**Any additional hopes, dreams, goals, or desired outcomes?**

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**PLAN**

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## SECTION 7: Main Themes for Next Year

10 MINUTES

Looking back on sections 5 and 6, do you notice any themes or areas of your life that you seem to have lots of goals in?

**What theme(s) do you notice from your list of events, projects, and goals for 2023?**

1

2

3

Next, of the areas of life, **circle one or two** that are standing out to you right now.

**JOB / CAREER**

**EMOTIONAL STATE**

**HOBBIES AND  
SIDE INTERESTS**

**RELATIONSHIP WITH MY  
SPOUSE / SIGNIFICANT OTHER**

**INNER PERSONAL /  
SPIRITUAL LIFE**

**REST TIME, DOWN TIME,  
AND "PLAY" TIME**

**RELATIONSHIP WITH MY KIDS**

**FINANCES**

**MENTAL STATE**

**RELATIONSHIPS WITH  
FRIENDS AND FAMILY**

**PHYSICAL HEALTH**

**SIDE HUSTLE**

When you think of focusing on one or two of the above areas of life, which one feels the most exciting? Which do you have the most energy toward? Which do you have ideas about?

Using the areas of your life that you just circled, and with the context of any recurring themes you are noticing: **pick two areas of your life that you most want to focus on in 2023.**

It will not be easy, but otherwise you are diluting your energy. If you try to do everything, you will do nothing; too many areas of focus will not allow you the time or energy to make meaningful progress.

**As much as you may want to, you cannot focus on *every* area of your life at the same time.**

*(Note: If you are completing this workbook with your spouse or partner, you will each have your own answers to this section. Dialog with one another about what you want your answers to be, so you can commit to them in unity and support one another.)*

*In 2023, I want to focus primarily on*

\_\_\_\_\_ *and* \_\_\_\_\_

*because* \_\_\_\_\_.

## SECTION 8: Next Year in One Sentence

10 MINUTES

Over the past several sections you have written down the highlights and challenges from the previous year. You've listed all the events, projects, and goals you have for your life. You've identified what main areas of your life you want to focus on. You've identified some common themes for the year ahead...

**With all that information, simplify it down to one sentence (or one word if you like).**

**Why?** Because the more clear you are, the more focused you can be with your time and energy.

If you want to have a few different sentences (perhaps one for yourself and another sentence for your family as a whole) that is fine.

(Note: As with Section 7, if you are doing this workbook with your spouse / partner, you will each have a different answer here. But dialog with one another about what you want your answers to be.)



Examples:

*"This year I am focusing on scaling my small business."*

*"This year is all about simplifying my commitments and being more present."*

*"This year I want to continue building a healthy work life while making time to exercise regularly and building thriving relationships in both my personal life and my work life."*

*"My theme for 2023 is generosity!"*

*"For the upcoming year, I am committed to maintain margin and breathing room in my life, so I can have more availability for the inner-circle relationships that need my full attention right now."*

Write down your 2023 Focus Statement and One Sentence.  
It was hard work to get to this point of clarity. Don't let that clarity drift out of sight and mind...  
Cut these out and put them somewhere you will see them regularly.

*In 2023, I want to focus primarily on*

\_\_\_\_\_ *and* \_\_\_\_\_.

*2023 in One Sentence*

## SECTION 9: What goals, events, and projects will you keep?

20 MINUTES

Alas, you can't do it all. You can do just about *anything* you want, but you cannot do *everything* you want.

1. **Review:** Look over your goals, projects, and desired-events from **Sections 5 and 6**.
2. **Remove:** What goals, projects, and events don't align with your main themes and areas of focus from **Sections 7 and 8**?
3. **Rewrite and Refine:** In the boxes below, write down the events, projects, and goals you plan to do in 2023. Also, note that you will now have to get a bit more specific with each one. Fill in as much information as you can.

*Note: If you are doing this worksheet with your significant other, keep in mind that you will have some goals which are unique to one or the other of you, some goals that are shared, and some goals that are for your family as a whole.*

### Goal Setting Best Practices

**Set goals that can be measured and have a defined timeline.**

With clear and measurable goals, you will be able to actually know (and celebrate) when you've achieved them. It will also help you to know what actions to take in order to make real progress.

**Examples of clear, measurable goals:**

- *Reduce credit card debt from \$7,000 to \$2,500 by June 15th.*
- *Increase physical activity from 30 minutes per week to 90 minutes per week, by March 1st, 2023.*
- *Write one new post each month during 2023.*

### Use Systems to Accomplish Goals

A system is simply the actions you can take which are predictive of achieving your goal; they are actions within your control.

Your goal is the direction you are going. A system is your way to focus on the actions that are going to get you there. These actions are your habits, routines, checklists, or small micro goals on a daily basis make great systems.

**Examples of systems (i.e. routines) that correspond with the goal examples above**

- *Withdrawal cash once a week according to budget, and use cash for all transactions.*
- *Go for a 20 minute walk 5 days a week.*
- *Write for 30 minutes a day every Monday, Wednesday, and Friday.*



1. Write down your focus area # 1 (from the two you listed on page 29):

---

2. Pick one goal (from sections 5 & 6) that aligns with the above focus area:

---

3. What is a single habit or system you can incorporate that will move you toward that goal?

Habit / Routine / System	Time Commitment	Frequency

4. This activity will move you toward your goal because \_\_\_\_\_

---

.....

1. Write down your focus area # 2 (from the two you listed on page 29):

---

2. Pick a goal (from sections 5 & 6) that aligns with the above focus area:

---

3. What is a single habit or system you can incorporate that will move you toward that goal?

Habit / Routine / System	Time Commitment	Frequency

4. This activity will move you toward your goal because \_\_\_\_\_

---

Okay! Here you go...

1. Get out your list of known events from **Section 4**.
2. Get out your edited list of planned events, projects, and goals from **Section 9**.
3. Plan out the current and/or the next month...
4. Use the template provided at the end of this workbook, use the Focus Course Digital Planner, or a planner / notebook of your own.

### **A few things to keep in mind...**

- Moving things from your list and putting it into a month will not be easy. That's okay. This is not your final draft. Just start putting things in place while trying to keep each month limited to just one major event.
- You are not creating a daily schedule for your entire month. Just the big picture for about what each month holds.
- Remember that your day-to-day lives will still be spent each day. Family life, work, school, and the like. So, as you plan out your month, the aim is to define success for each month and to give yourself a roadmap for the big things you want to do and what months you expect to do them.
- Don't overcommit your month. Give yourself margin and breathing room.
- You may not be ready to define your "life theme / focus" for every single month — especially the latter months of the year. And that is okay. That's why we are only beginning with one month at a time.
- Again, you may not be ready to define success for every single month. That's why we are starting with one month at a time. The further away you get into planning the future, the more hazy it becomes. That's why we're focusing on the granular right now.
- You will want to revisit these monthly overview worksheets every month throughout the year. Set a reminder on your calendar or your phone.

This month's main goal:

A task or routine that will help me work toward the above goal:

This month's most important event or project:

Defining success for this month:

One way I can maintain margin this month is by:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

Notes

## What Next?

Congratulations! You have done a challenging thing: You took the time to get clear and focused on what matters to you for 2023. You are now set up for success because you have a clear picture of what your goals are for the year, what you want to focus on, and what matters most to you.

### How to keep the momentum going:

- Schedule monthly and quarterly reviews to see if your goal systems are still on track.
- Print out your 2023 Focus Statement and put it somewhere prominent in your home.
- Print out and fill in your monthly planning pages to help you stay focused on each month's main goal, and the routine that will help you move toward it.
- Share your 2023 focus statements with friends, family members, and folks on the World Wide Web.

### How to Stay Unstuck

Get your all-access pass to every on-demand course in our library, plus a community to help you get clear, take action, and keep going.

With a Focus Accelerator membership, you get:

- Unlimited access to every on-demand course in our library.
- Coaching calls and Office Hours every month
- Accountability and traction within the members-only Focus Community.

If you are a creator or leader who wants to uncomplicate things, get clear on what matters, and finally have the breathing room to focus...

**[thefocuscourse.com/accelerator](https://thefocuscourse.com/accelerator)**

### FOCUS LIKE A BOSS

Attention Business Owners and CEOs. Focus Like a Boss is our new, premium program for small business owners like you who are ready to reduce your working hours and grow your profits.

- ✓ **Less Tasks:** Delegate & eliminate the busywork from your week.
- ✓ **More Time:** Designing your business and enjoying your life.
- ✓ **Better Ideas:** Thanks to organization, prioritization, and systems.

For CEOs only...

**[thefocuscourse.com/boss](https://thefocuscourse.com/boss)**