



A little guide for

Soulful Annual Planning: 2021

BY ANNIE WRIGHT, LMFT

A Little Guide To Soulful Annual
Planning: 2021

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Hello! And thank you so much for purchasing *A Little Guide To Soulful Annual Planning: 2021*.

I'm excited for you to dive in and craft the year of your dreams!

But before we begin I want to share a little bit about me, why I created this workbook, what makes it different than the other yearly planners out there on the market, and what you can expect in the following pages.

So who am I? Well, I'm a licensed psychotherapist, founder of a 7-figure boutique therapy center, mental health writer, and former nonprofit executive.

As a therapist, I'm used to swimming in deep, soulful inquiry daily with my clients, helping them get crystal clear on their deepest, most heartfelt and authentic desires and dreams.

And as a successful entrepreneur and former nonprofit executive, I'm skilled at being organized and being efficient.

During this career, I've managed teams of people, big departmental budgets, and very ambitious, complex projects

of all sizes and scopes. Because of this, I've developed a solid skill set for extensive project management and goal execution.

So as you can probably tell, I'm a bit of a right brain/left brain chameleon.

I'm also someone who happens to LOVE rituals.

I especially love rituals and practices that help me get more present, curious, and engaged with myself and that help me feel empowered to create and cultivate the life I desire.

So, over the last five years, **I've developed an annual goal clarifying and yearly planning ritual that that marries both of these parts of myself — the soulful, emotional therapist right brain side of me with the action-oriented, logical, business-savvy left brain part of me.**

In doing so, I've created a yearly planning system that helps me deeply inquire, review, and get clear on what I want to create in my year ahead and plot it against a signature tool to help me get those things done daily, weekly, and monthly.

This annual goal clarifying and yearly planning ritual has now become *A Little Guide To Soulful Annual Planning: 2021.*

It's something I love to do in the quiet, slumbering last week of the year between Christmas and New Year's Eve to help me prepare well for the coming year. But truth be told I also come back to this workbook at different points through the year – sometimes quarterly and often in June – to help me refresh and clarify my goals.

And no matter when I do it, it's been an exceptionally

effective system for me both in my personal and business lives as it's truly unlike any other yearly planning workbook I've ever found on the market.

Why?

Because some other annual planners will only invite you to take a surface level review of your major life areas and plot some numeric goals against it, skipping over the soulful, emotional inquiry that might help you access more authentic dreams and identify deeper patterns you may want to work on in the coming year.

On the other hand, some other planners might invite you to make some of this deep, personal inquiry but will stop short of providing you with the necessary next steps and planning tools for how you break down those goals and start achieving them.

And rarely will another planner invite you to take stock of the year that came before and help you glean all the lessons, learnings, and closure you may need from it to begin your new year with greater clarity and insight.

***A Little Guide To Soulful Annual Planning: 2021* fills ALL of these gaps.**

In the coming pages, you will not only be called upon to flex both your left and right brained-selves, but you will also get a chance to review, honor, and close out 2020, taking from it any critical insights and lessons that you may want to apply to 2021.

You will next inquiry deeply through a series of soulful

Introduction

prompts that take you through key life areas to help you clarify your deepest most heartfelt goals.

Finally, I will provide you with my signature downloadable planning tool and step-by-step instructions on how to make your most authentic dreams an actionable, practical reality in 2021.

This workbook a deep, powerful, and effective process that will surely help you achieve your goals for 2021 if you invest the time and energy into it.

So I invite you to carve out several hours (or several days), pour yourself a hot strong mug of tea, and take your time with this process. As with all things in life, you'll get out of it what you put into it.

So are you ready to begin and make 2021 a truly wonderful year for yourself?

Introduction

Chapter 1: Mindfully Closing Out The Year Before: Saying Goodbye to 2020.

Chapter 2: Consciously and Intentionally Crafting Your New Year: Welcome 2021, Welcome.

Chapter 3: Translating Intention Into Action: Getting All The Things Done.

1. **Step One:** [Download my signature annual planning workbook tool here.](#)
2. **Step Two:** Craft your vision statement for 2021.
3. **Step Three:** Transfer goals to the goal master list.
4. **Step Four:** Discern and select.
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Mindfully Closing Out The Year Before: Saying Goodbye to 2020

Before we welcome the new year and set our intentions for all we want to create, pursue, and do in 2021, it's important that we create some sense of closure with the year prior so we can physically release it, too, as the clock turns over on New Year's Eve.

The prompts and questions that follow are designed to help you take stock of your prior year, gleaning it for the lessons learned, finding the proverbial gold in the mud (especially if the year felt hard!), and cultivating some sense of closure for the past twelve months of your life.

And you'll see that I've laid out this series of prompts across several major life areas: Physical health, mental health, home/environment, finances, family/friends, romance/significant

other, work/career, education/personal growth, adventure/play, and spirituality.

You may ultimately want to substitute, change, or even skip some of these areas if they don't resonate with you which is totally fine!

Make this process your own. You will see, though, that these same life areas inform the prompts for crafting your 2021 and are in the signature, downloadable planning tool. If you make changes, just substitute them across all three sections.

Also, please know that if you want to use these prompts and inquiries for your business life instead of/in addition to your personal life, just swap out the categories for major business bucket areas like finances, marketing, operations, administration, etc..

Again, make this process your own and have fun tailoring it to the uniqueness of your situation!

And note: I encourage you to grab your journal or open up a new Google document to write down your answers to these prompts and inquiries below — doing the exercises will feel richer than just reading them.

If you were to describe 2020 for you in three words, what would they be?

(Example: Unexpected! Challenging. Soulful.)

1.

- 2.
- 3.

What were your overall three dominant feeling states in 2020?

(Example: Excited. Empowered. Anxious.)

- 1.
- 2.
- 3.

What physical health lessons did you learn in 2020?

What physical health accomplishments or progress did you see? What physical health issue became or remained challenging?

(Example: Maybe you learned that your body responds well to eating meat again. Maybe you progressed in eating more intuitively or finding an exercise routine that feels right for your body. Perhaps you sprained your ankle yet again.)

- 1.
- 2.
- 3.

What was the most beautiful sight you saw in 2020? The most moving interaction you witnessed? In what moment did you feel your humanity the most?

(Example: Maybe it was meeting your baby nephew for the first time. Perhaps it was helping your friend move to a new apartment post-breakup. Maybe it was feeling heartbroken and sitting on your bathroom floor after the death of a loved one.)

- 1.
- 2.
- 3.

What mental health lessons did you learn in 2020? What mental health accomplishments or progress did you see?

What mental health issue became or remained challenging?

(Example: Maybe you joined a women's circle this year that provided a lot of emotional healing for you. Perhaps you began therapy to work on your eating disorder. Maybe you continued to overcommit yourself unhappily this year.)

- 1.
- 2.
- 3.

What was the nicest compliment you received in 2020?

What was the best compliment you gave this year?

Where and how did you give your time, talent, or resources to make the world a little better?

(Example: Perhaps someone on the morning commute bus paid you a compliment. Maybe you gave them one in turn. Perhaps you served on several boards this year and donated time and expertise to advancing good causes.)

- 1.
- 2.
- 3.

**What home/environment lessons did you learn in 2020?
What home/environment accomplishments or progress did you see? What home/environment issue became or remained challenging?**

(Example: Maybe you found the most perfect little rental and a sweet roommate to share it with. Maybe you learned you wanted to live more minimally and KonMari'd your place all through the Fall. Perhaps you realized you want to move to another state, but haven't yet.)

- 1.
- 2.
- 3.

What was the biggest problem you solved in 2020? What was your greatest win of 2020? Looking at both of these examples, what can you learn from them?

(Example: Maybe you learned how to step into your leadership at work. Perhaps you got published in the HuffPo. Perhaps you see that claiming and using your voice is the thread between these two examples.)

- 1.
- 2.
- 3.

What financial lessons did you learn in 2020? What financial accomplishments or progress did you see? What financial issue became or remained challenging?

(Example: Maybe you learned how to set and stick to a realistic budget. Perhaps you opened up and fully funded a Roth IRA this year. But maybe you still overuse your credit card.)

- 1.
- 2.
- 3.

What achievement of yours are you most proud of this year? Could you have been able to do this in 2017 or 2018? What helped you be able to achieve that accomplishment this year?

(Example: Perhaps you're most proud of getting up every day and showing up to work to pay the rent and feed your kids, even on days when you felt depressed. Maybe you realize that what made this possible in 2020 versus 2018 was having a tribe of uplifting girlfriends you could call on for support.)

- 1.
- 2.
- 3.

What family and friends lessons did you learn in 2020? What family or friends accomplishments or progress did you see? What family or friends issue became or remained challenging?

(Example: Maybe you made an incredible new girlfriend. Perhaps you and your parent repaired a longstanding rift that had been between you. Maybe you still struggled with balancing time with friends and time alone.)

- 1.
- 2.
- 3.

Where and how did you flex your creativity in 2020?

What was one little daily ritual you had that brought you joy? What did you build in 2020?

(Example: Maybe you made a homemade meal once a week for you and your sweetie. Perhaps you incorporated drinking lemon water into your mornings. Maybe you built a home filing system that eased your stress levels immeasurably.)

- 1.
- 2.
- 3.

What romance/significant other lessons did you learn in 2020? What romance/significant other accomplishments or progress did you see? What romance/significant other issue became or remained challenging?

(Example: Maybe you finally asked your crush out. Maybe you learned how to more easefully be in a relationship with your sweetheart thanks to some solid couples counseling. But perhaps you still struggled with prioritizing work over date nights.)

- 1.
- 2.
- 3.

What was your very favorite purchase this year? What was your least favorite purchase? How did either of these purchases impact your life?

(Example: Perhaps it was a piece of software that made your life (and taxes!) much easier. Maybe buying a used car ended up being a bigger hassle than it was worth.)

- 1.
- 2.
- 3.

What work/career lessons did you learn in 2020? What work/career accomplishments or progress did you see? What work/career issue became or remained challenging?

(Example: Maybe you finally launched your side hustle. Perhaps you deepened your leadership role at work and made plans to ask for a promotion in the coming quarter. But maybe you realized your low self-esteem was impacting your belief in your worthiness of the corner office.)

- 1.
- 2.
- 3.

Looking back on the year, what three things would you now do differently in your life and why?

(Example: Perhaps you would have sought out support sooner. Maybe you would have given notice to work in a different manner. Maybe you would have hired a house cleaner.)

- 1.
- 2.
- 3.

What personal growth/education lessons did you learn in 2020? What personal growth/education accomplishments or progress did you see? What personal growth/education issue became or remained challenging?

(Example: Perhaps you found a teacher or mentor whose work on a subject you absolutely loved and devoured. Maybe you took an online class that challenged you in new ways. Perhaps you still struggled with a particular aspect of your grad school program.)

- 1.
- 2.
- 3.

What adventure/play lessons did you learn in 2020? What adventure/play accomplishments or progress did you see? What adventure/play issue became or remained

challenging?

(Example: Perhaps you finally signed up for that Zumba class! Maybe you found a way to go on a rural road trip with your best friend once every other month. Or perhaps you struggled to make time for much play at all this year.)

- 1.
- 2.
- 3.

What was the best news you received in 2020? What was the worst? What was the best news you gave someone this year?

(Example: Was it learning your mom was cancer free? Was it learning you've fallen out of love with your career? Perhaps you shared your pregnancy with friends and family?)

- 1.
- 2.
- 3.

What spirituality lessons did you learn in 2020? What spiritual accomplishments or progress did you see? What spirituality issue became or remained challenging?

(Example: Maybe you found your spiritual home in a local church. Maybe you found it in a local park. Perhaps you learned the deeply spiritual lesson of withholding criticism or

checking out assumptions before acting on them. Maybe you struggled with accepting parts of your childhood religion this year.)

- 1.
- 2.
- 3.

Across all of these life areas, what are any threads or trends that you're noticing? What common themes run across your accomplishments or challenges (if any)?

(Example: Perhaps you're seeing that you really stepped outside of your comfort zone in some significant ways this year. Maybe you see that discipline remains a struggle for you in some respects.)

- 1.
- 2.
- 3.

Across all of these life areas, what are some goals that you let go of, what dreams were retired, what did you release once and for all in 2020?

(Example: The idea of going after a Ph.D. Your tendency to always want to have the last word. Your dream of quitting your job (at least for now) so that you could make more headway on paying down debts.)

- 1.

- 2.
- 3.

What did you learn about your capacities and skills and character in 2020? What surprised you about yourself in 2020? Why are you proud of yourself?

(Example: Maybe you learned you could forgive someone you never thought you could forgive. Perhaps you realized that you're a pretty great public speaker after all. Maybe you're proud of how hard you worked this past year.)

- 1.
- 2.
- 3.

Who were the teachers who showed up along your path in 2020?

(Example: Maybe it's the ex who taught you a painful lesson (remember — our teachers come in all shapes and sizes). Maybe it's the professional dynamo who shared a coffee with you and showed up in a mentoring role.)

- 1.
- 2.
- 3.

Looking back on 2020, if your year was a genre of movie,

**what genre would it be? What was the biggest plot twist?
What do you think happens in the film next?**

(Example: Multi-generational sweeping drama? Dystopian strong female lead adventure story?)

- 1.
- 2.
- 3.

Looking back on 2020, what would you say the year taught you? If the year had been designed to serve you up three big life lessons, what would they be?

(Example: Good things come to those who work their butts off. You can love someone, but you can't change them. The Universe has my back in a big, big way!)

- 1.
- 2.
- 3.

What do you need to release from 2020 to move into 2021 with openness, peace, and completion? What do you need to say out loud, who do you need to forgive, and what do you need to emotionally say goodbye to move into 2021 with a wide open heart?

(Example: Do you need to send some love to a challenging relative and forgive him? Do you need to acknowledge that

this was the last year of you working a 9-5? Perhaps you need to forgive yourself for not keeping your word this year.)

- 1.
- 2.
- 3.

Now, finally, if 2020 was an ex you were saying goodbye to, what are three things you want or need to say to this last year to feel complete?

(Example: I forgive you. I know we tried our best, and it was hard at times, but man was it worth it. I'm moving on, and I finally feel hopeful again. You taught me a lot, and I'm taking that with me. Thank you. And goodbye.)

- 1.
- 2.
- 3.

Take some time with this whole process, really explore what you wrote above and craft a few final sentences.

Acknowledge all you received in 2020, all that you struggled with, what you're looking forward to letting go of, and anything else you might need or want to say to bring some closure to this year.

Once you've written these few final sentences down, speak them out loud while placing your hand over your heart, and close your eyes and envision sending 2020 and all of its

challenges, joys, trials and triumphs off on a wooden boat into the ocean.

Send 2020 off with love and with completion, because now we're going to dig deep again and get clear on all that you want to create, manifest and birth in 2021.

Consciously and Intentionally Crafting Your New Year: Welcome 2021, Welcome.

With our review of 2020 complete, I'm imagining you feel far clearer on what you accomplished, learned, longed for and received in the prior year.

Now we're going to take all of this insight and apply it to your goal-setting process for the new year because when we know more clearly what's come before us, we're then empowered with the awareness to create our futures more consciously.

In the following prompts and inquiries, we're going to visit those same major life areas (with some extra insightful prompts thrown in for good measure!).

We will help you not only identify the goals you have for each of these areas but also what the primary supports

and next steps you may need/want to take on each goal would be and when you would like to accomplish this.

So if you've completed the closeout of 2020, I encourage you to open up the same Google Doc you used or flip ahead in your journal and write down your responses to the inquiries.

Writing down your answers to these prompts will yield far more than just reading them – I promise!

With that said, let's begin.

**In three words, how do you feel about the arrival of
2021?**

(Example: Excited! Ambivalent. Nervous.)

- 1.
- 2.
- 3.

**Recalling what you discovered when you reviewed 2020,
what from 2020 do you want to bring with you into
2021? What do you want to leave behind?**

(Example: I want to bring the integrity I felt throughout the year that helped me make so many good decisions about my life. I want to leave behind the overscheduled calendar! I want to do more outsourcing to bring ease to my life.)

- 1.
- 2.
- 3.

Recalling the three words you used to characterize your 2020, what three words do you hope and intend for 2021 to embody?

(Example: Easy. Healing. Expansive.)

- 1.
- 2.
- 3.

Fill in the blank: If 2020 was the year of _____, I intend for 2021 to be the year of _____.

(Example: If 2020 was the year of tough love and hard work, I intend for 2021 to be the year of integration and taking significant action.)

What are your top three dreams and goals for your physical health in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: In 2021, I intend to begin practicing martial arts. To do this, I will need to research which school of martial arts appeals to me, search around for studios near my house, and see if they allow drop-ins. Maybe I even need to buddy up with an accountability partner since I'm a little nervous about

going. I want to be taking classes by March, so I'll begin research in early January as my first step.)

- 1.
- 2.
- 3.

What are three ways you're going to take excellent care of your precious self this year?

(Example: I will get 8 hours of sleep. I will keep Friday nights clear for plans with girlfriends. I'll upgrade the sheets I sleep on, so my bed feels luxurious.)

- 1.
- 2.
- 3.

What are your top three dreams and goals for your mental health in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I will find better ways to manage my anxiety this year. To do this, I'll begin therapy, and I'll pick up some of those adult coloring books to help calm my mind in the evening. I want to start doing this as soon as possible, so I'll reach out to a therapist by the end of January.)

- 1.
- 2.
- 3.

What will a perfect day in 2021 look like for you? Vision it out.

(Example: It would be a day spent at the office in my new dreamy UX designer job! I'll wake up at 7, go to the pool and swim, then catch the bus to work and get to work on projects that inspire and delight me with colleagues that respect and collaborate with me. I'll be home by 7 and have a few quality hours to spend with my husband.)

What are your top three dreams and goals for your home/environment in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I want to totally redesign my home office since I now work from home full-time. I want it to be elegant, gorgeous, and functional. To make this happen I need to set a budget, gather inspiration ideas for DIY decor, and maybe take a trip to the flea market to find some funky vintage furniture. I want this to be done by the Spring when my sister comes to visit so I'll start working on it the first week of February by starting a Pinterest board.)

- 1.
- 2.
- 3.

What are three places/destinations/sights you really

would just love to see and visit in 2021?

(Example: Barcelona! Overnight camping in Yosemite. Visiting my grandma on the other side of the country.)

- 1.
- 2.
- 3.

What are your top three dreams and goals for your finances in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I'd like to enlist the services of a financial planner to help me maximize my portfolio. To make this happen, I'll need to search Yelp for some recommendations and set up initial consults with the ones I like. I want to do this after April 15th, so I'll put it on my calendar to begin working on the week after.)

- 1.
- 2.
- 3.

Remember how we talked about the type of movie you would describe 2021? Remember how I asked you what happens next in that film? I want you to write a few sentences continuing imagining into that next chapter of the movie in 2021. What do you imagine happens next?

(Example: In the RomCom flick of my life, in the next chapter, the heroine makes her bold moves towards the career, the love interest, and the life that she wants but has never before had the moxie to pursue! This is the chapter where she turns her big dreams into reality!)

What are your top three dreams and goals for your friends and family relationships in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I want to host a potluck for my girlfriends each month. To do this, I need to start a Doodle poll to see what night in the coming six months might work for 5 or 6 of us and then assign different dishes to each friend for each evening. I want to do the first one by February, so I need to get that poll and email sent out the first week of January.)

- 1.
- 2.
- 3.

**In what three ways would you like to invite more
creativity into your life in 2021?**

(Example: How I dress and express myself with clothes. Maybe I'll make a homemade postcard and send it to a friend each week. And I'd like to sign up for that jewelry making class!)

- 1.
- 2.
- 3.

**What are your top three dreams and goals for romance/
your significant other in 2021? What are the supports/
tools/resources you need to put in place or take action on
to make this happen? What's your timeline for making
this occur in a way that would feel good to you?**

(Example: I want to have a weekly date night with my honey. To do this, I need to talk to him and agree on a night and who's going to take turns planning it and what our household budget for these nights might be. I want to start this next week and will talk to him after the holidays in early January.)

- 1.
- 2.
- 3.

**What are your top three dreams and goals for your career
in 2021? What are the supports/tools/resources you need
to put in place or take action on to make this happen?
What's your timeline for making this occur in a way that**

would feel good to you?

(Example: I want to ask for a promotion that would allow me to double the number of staff I supervise and a title change and a 5% salary increase. To do this, I need to research comparable market rates for this promotional role across my industry, set up a meeting with my boss, and plan on how I'm going to advocate for myself. I want to do this ASAP, so I'll get started on this in the first week of January.)

- 1.
- 2.
- 3.

What three teachers/mentors/guides do you want to call into your life in 2021 to help you create and navigate the life you desire?

(Example: I need to find a skilled therapist. I need to find a mentor who can teach me how to up-level my firm's growth. I would love to meet and study with that online marketing guru I love so much!)

- 1.
- 2.
- 3.

What are your top three dreams and goals for your growth/education in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I want to take some great online classes and in-person workshops that will help me become a better manager. I'd like to talk to my boss about the personal development budget for staff and then check out what's available locally and online. I'll try and speak to my manager by the end of January about this.)

- 1.
- 2.
- 3.

How do you want to give back with your time/talent/or resources in 2021?

(Example: I want to volunteer monthly with an organization helping refugees resettle in this country.)

What are your top three dreams and goals for adventure/play in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I want to go on a white water rafting trip with my grad school buddies. I need to talk with them and see if there's enough interest to make this happen in late Spring and then figure out which rafting company we want to hire. I can start researching companies now and will also launch a text chain about possible interest and dates.)

- 1.
- 2.
- 3.

If 2020 were to have a theme song, what song would you like it to be?

(Example: *Fight Song* by Rachel Platten)

What are your top three dreams and goals for your spirituality in 2021? What are the supports/tools/resources you need to put in place or take action on to make this happen? What's your timeline for making this occur in a way that would feel good to you?

(Example: I want to find a liberal, local church in my community. I want to develop my daily spiritual practice.)

*Consciously and Intentionally Crafting Your New Year: Welcome 2021,
Welcome.*

- 1.
- 2.
- 3.

What three life lessons do you want to explore, learn and deepen this year in 2021?

(Example: I want to find out how to claim and use my voice more in all areas of my life. I want to honor my intuition. And I want to practice more allowing and receiving versus forcing.)

- 1.
- 2.
- 3.

If you could wave a magic wand and manifest the year of your dreams, what would 2021 hold for you?

(Example: 2021 would be the year I get the promotion I've been working towards, the year my wife and I try to get pregnant, and the year we find our dream forever home. It would be a year where my heart's desires come true and where all the hard work of the past four years pays off.)

Now, reviewing all that you listed above, I want you to craft a few sentences about your vision statement for 2021. Infuse these sentences with your hopes, intentions, and wishes for what you hope 2021 will hold for you.

We're going to use this vision statement in the

signature downloadable tool as well as help you now take those beautiful goals you identified and actually break them down into actionable realities for you.

If you're ready to do this, keep reading.

Translating Intention Into Action: Getting All The Things Done.

If you've gone through all of these prompts and taken the time to write out your answers, you should have a beautiful, rich list of dreams, goals, intentions, and hopes for your 2021 (Thanks, Right Brain!).

And while having clarity is wonderful, what's also true is that dreams without actions are just that – dreams. And while I'm a big fan of dreaming, I'm also a bigger fan of seeing dreams actualize into reality. That's where the real magic lies!

That's why in this third and final part of *A Little Guide To Soulful Annual Planning: 2021*, I'm going to provide you with a link to my signature, downloadable yearly planning tool.

I'll also provide you with step-by-step instructions on how to map your rich insights and goals into this tool in

a way that will let you take easy, practical action on these goals all year long. (Time to activate your Left Brain!)

Step One: Download my signature tool

Download my signature annual planning workbook tool here. A Google Excel doc should now automatically download onto your computer, touchpad or phone. Save it to your desktop or upload it to Google Drive if you use that. And if the download doesn't automatically begin, you can access it here: <https://anniewrightpsychotherapy.com/wp-content/uploads/2017/11/Tool-to-Take-Action-on-Your-2020-Goals.xlsx>

And please, when you open it, don't be overwhelmed by the number of tabs on the spreadsheet!

I promise they are all there for a reason and we will walk through them together. For now, take a few moments to adjust the spreadsheet cells as some may be a bit funky from the download.

Step Two: Craft your vision statement for 2021.

Using the prompts and inquiries from chapter two of this workbook, it's time for you to craft your vision statement for 2021.

Example: "I intend for 2021 to be the year of ease, healing, and expansiveness where I call all the teachers, resources, and

supports I need into my life to accomplish my big life goals. 2021 will be the year I thrive!”

Now, take this vision statement and paste it into each of the four tabs where it says Vision: (insert your vision here).

Why do this? I believe deeply in the positive power of saturating our minds and unconscious with the repetition of words.

Repeated words become what we believe and because you will be accessing this planning tool regularly throughout 2021, I want you to see your vision statement for the year each time you look at any tab in the document. Seeing it regularly will have a powerful effect on your unconscious and conscious mind.

Step Three: Transferring goals into the Goal Master List.

Now, go back to part three of this workbook and begin transferring the goals you identified by category into tab four: Goal Master List.

Note: You will see on this tab and the others that I moved mock examples from the prompts into the different cells to help you see how this might look. Feel free to delete them once you get the gist.

Also, please know that you can use this Goal Master List now and throughout the year to add new goals/brainstormed projects/wishes to each category of your life. For example, if you become clear about a heap of new financial or career goals that you'd like to accomplish at some point, just list them all out here.

I want this to serve as the place where you list All The Things, no matter how far out there they seem or when you brainstorm them. Think of this sheet as your “brain dump” sheet. Let it free up some space in your mind by getting all your big ideas onto this running list of projects and goals.

Step Four: Highlight and Discern.

Now, go through each of these life categories and highlight the goals you truly want to accomplish versus those you’re lukewarm or ambivalent about.

Use this highlighting process to help discern which, of all these many goals, has the most energy for you. In doing this, you can save yourself from Goal Overwhelm by really only going with the goals that appeal to you most, that are most likely to get done, and that will help you forward your life in ways that truly feel powerful to you.

And please know, you can always go back to this sheet throughout the year and highlight those you have accomplished again in a different color and review your goals to highlight which ones are new priorities.

Step Five: Match goals to months.

Now, map out each of your goals against the calendar months you will see in tab three: 2021 Calendar.

Also, now’s the time to add in any other big milestones you already have scheduled into 2021 — your best friend’s

wedding, that Fall trip with your honey to Cabo, your annual work review, your birthday, etc.

By listing out both the goals you'd like to accomplish and the scheduled events of your year, you will begin to see the full calendar landscape of your 2021.

Step Six: Make the macro micro.

Take any goal you identified you want to accomplish in 2021 and break it up into all the little micro tasks it requires in tab two: 2021 Goal Task List. We somewhat did this above in the 2021 prompts and inquiries, but now I want you to hone in on each goal further and illuminate all the many micro steps it may take to achieve your big goal and when you want to reach this step by.

You will see I've included category, the person responsible, and note columns in addition to task and deadline columns. This can be helpful for both keeping you super organized, and for those times you want to share your planner with someone else like your significant other or a personal or virtual assistant who may be working with you on these projects.

And now note: You probably *won't* want to do this step.

It's by far the biggest and most intensive of any step in this whole workbook but if you do it, if you take the time now to map out the tasks of each of your goals fully (in essence, project managing your goals), you will significantly increase your odds of success in achieving them. It's hard to hit targets

we can't see, and it's hard to stay organized and on top of projects unless we have a clear scope of all that they will realistically require of us.

So invest the time upfront in breaking down your highlighted goals task-by-task, and I promise you that you will reap the rewards of this later. But please know that you don't have to break down every single goal of yours. Instead, try to break down at least the next three months of big goals at least and then do that again each quarter if that feels more manageable to you.

Step Seven: Make it real and actionable.

Do this by scheduling out your tasks each week of the year in tab one: weekly to-dos. I like to use this planning tool on a regular, daily basis and transfer all the future steps of any goals into the week I'm working within.

In other words, this is the time where you cut and paste any action steps with deadlines falling on that calendar week into tab one and then either work on this document or cut and paste those steps into your electronic or hard-copy calendar and then work on it.

By taking time on a weekly basis to transfer any upcoming to-do's to your weekly to-do list, deleting those that have been accomplished, and rolling over those you haven't, you will develop a rhythm of actionable, practical step-by-step execution of your soulfully identified goals. And when you

Translating Intention Into Action: Getting All The Things Done.

combine regular, focused action with soulful self-inquiry and goal-setting, amazing things can begin to happen in your life!

Wrapping Up & Moving Forward.

So there you have it: *A Little Guide To Soulful Annual Planning: 2021*. If you've taken the time to work through the many prompts plus explored and utilized my [signature downloadable planning tool](#) to project manage your big, beautiful goals, you should now have a powerful roadmap of action and intention for 2021.

So will using this workbook necessarily feel easy?

It may not feel easy the first time you use it and if you're not particularly left-brain oriented, it may take some time to feel comfortable with the utilization of my signature, downloadable tool on a weekly basis.

But if you keep at it, the planning tool will become more and more intuitive, marrying that right-brained part of you with your rich, deep soulful dreams with that left-brain, action-oriented side of you.

And like I mentioned at the beginning of this workbook, you can come back to this process at any point throughout the year. I personally love to review my goals in June around my birthday and reset and recalibrate my action plan for the rest of the year.

So make this process your own, make it work for you.

Take what feels valuable and leave the rest, swap out your own inquiries, plug your goals into your own planning methodology, do whatever works for you.

But whatever you do, take the time to dream about your life in 2021. Because, as the poet, Mary Oliver asks of us all, “Tell me, what is it you plan to do with your one wild and precious life?”

And please, email me at annie@anniewright.com to let me know what you thought of this annual planning workbook, let me know how it helped you in any way, and what the big goals you’re dreaming up for yourself in 2021 are. I read each and every email I receive and I’ll respond to you personally.

I can’t wait to hear from you and, until then, have a truly wonderful 2021!

About the Author



[Annie Wright, LMFT](#) is the founder and clinical director of [Evergreen Counseling](#) – a boutique therapy center located in Berkeley, California – as well as a licensed psychotherapist who specializes in relational trauma recovery.

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