



HOW TO USE THIS TOOLKIT:

Set aside 60–90 minutes of focused time in a quiet, comfortable space. Bring a beverage, your journal or notepad, or open your digital notes. This is your time to reconnect with your vision, evaluate your progress, and build a solid plan to finish the year strong.

PART 1: RECONNECT WITH YOUR VISION

Instructions

Review the goals you set at the beginning of the year. Reflect on the *why* behind each goal and whether your current priorities still align with your long-term vision.

Reflection/Journal Prompts:

- What was the original *vision* behind my goals this year?
- Have my values or priorities changed?
- Do my current goals still align with my long-term vision?
- Have any new goals emerged that now feel more relevant?

✓ **Action:** List 2–3 goals that are still aligned with your vision

✓ **Optional:** Cross out or revise goals that no longer reflect your top priorities

PART 2: EVALUATE YOUR PROGRESS

Instructions

Assess each goal using a combination of reflection and metrics. Use the *Quantum Steps* model: break big goals into 5–7 mini-actions tracked weekly or monthly.



Steps:

- Revisit each goal and write down your progress.
- Compare your expected outcomes with your current results.
- Rate your progress on a scale of 1–10.

Reflection Questions:

- Which goals are on track or ahead of schedule?
- Which goals have lagged behind?
- What specific wins or progress can I celebrate?

☒ **Action:** Complete the table below for at least 3 major goals:

Goal Area	Quantum Steps Completed	Progress Summary	Next Step
Example: Fitness	4/7 (Daily walks, meals)	Lost 5kg, feel stronger	Add strength training 2x/wk

PART 3: IDENTIFY CHALLENGES AND PATTERNS

Instructions

Understanding your obstacles is crucial to breaking patterns and making progress. Awareness gives you power.

Steps:

- Reflect on what's held you back—both internal (mindset, habits) and external (scheduling, support).



- Look for recurring patterns that affect performance.

Reflection Questions:

- What challenges have consistently come up?
- Are there self-sabotaging patterns I need to confront? (e.g. overcommitting, procrastination, self-doubt)
- What feedback (formal or informal) have I received from peers, mentors, or coaches?

☒ **Action:** List 3 common challenges and the impact they've had on your performance.

PART 4: DEVELOP SOLUTIONS & STRATEGIES

Instructions

Now turn your reflections into a strategic plan. Use the SMART criteria: Specific, Measurable, Achievable, Relevant, Time-bound.

Steps:

- Brainstorm strategies to overcome each challenge.
- List new actions or habits that will support your progress.
- Set deadlines and accountability systems.

Template:

Challenge	Solution/Strategy	New Action Step	Deadline
Lack of focus	Morning planning routine	15-min daily priority review at 8am	Start Monday
Overwhelm	Reduce multitasking	Use time-blocking in calendar	This week
Self-doubt	Confidence journaling + coaching support	Weekly journal prompt + coaching call	Ongoing



☒ **Optional:** Share your strategy with an accountability partner or coach.

PART 5: RESET YOUR QUANTUM STEPS

What are Quantum Steps?

Clear, small actions that move the needle on your desired goals.

Instructions

Now that you're clear on what to improve, recommit to your goals with new, realistic quantum steps.

Steps:

- Review or reset your primary goals if needed.
- Define new Quantum Steps for each goal.
- Assign frequency and checkpoints (weekly, bi-weekly, monthly).

Example Template:

Goal Area	New Quantum Step	Frequency	Deadline
Career Growth	Complete Leadership course module	2x/week	July 30
Finances	Track expenses + review budget	Weekly	Ongoing
Self-care	Sleep 7+ hours, 5 nights/week	Daily	Review weekly

PART 6: Cultivate Resilience and Adaptability

Instructions

Success isn't just about strategy. it's also about emotional and mental endurance. Build the habits that will carry you forward no matter what the year throws at you.



Suggested Practices:

- Daily gratitude journaling (3 things you're thankful for)
- Weekly reflection (What worked? What didn't?)
- Mindfulness or breathwork breaks
- Monthly check-ins with a coach or accountability partner

Reflection Questions:

- How can I respond more effectively to setbacks?
- Where do I need to be more flexible or open to new approaches?
- What mindset shifts will help me thrive, not just survive?

☒ MID-YEAR REVIEW CHECKLIST

- ☐ Revisited my vision and long-term goals
- ☐ Evaluated my progress and tracked key metrics
- ☐ Identified key challenges and patterns
- ☐ Designed new strategies and Quantum Steps
- ☐ Recommitted to a sustainable action plan
- ☐ Built in resilience and adaptability practices
- ☐ Created a system for accountability

READY FOR YOUR NEXT LEVEL?

You don't have to do it alone.

With 1:1 Executive Coaching, you'll get personalized strategies, accountability, and expert guidance tailored to your goals.

Click Link the Book a FREE Discovery Call Today

Meeting Scheduling: <https://forms.gle/qk6QcWbK5eXLLqeN7>