



BeWell

Follow The Flow

Weekly Review Workbook

- *Make space to think clearly.*



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Get Clear

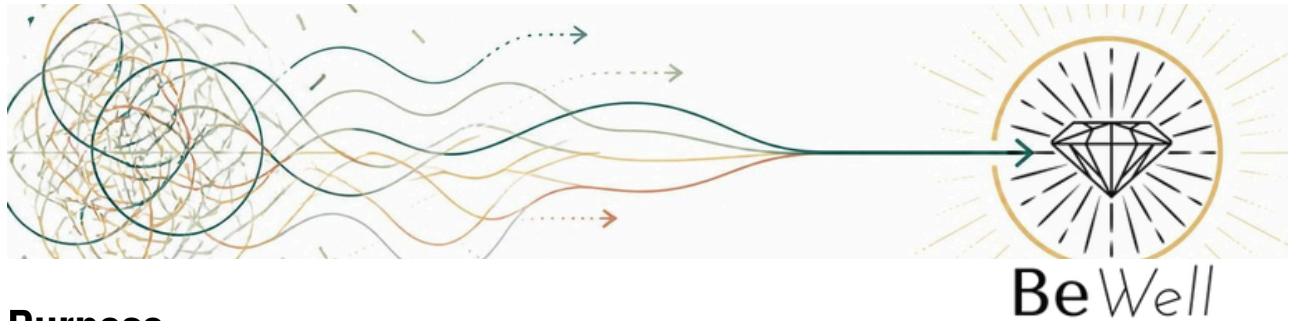
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Purpose

Use this workbook to clear mental and physical clutter, update your lists, and create space for new ideas.

The goal is not simply to review information, but to decide what each item means and where it belongs.

Instructions

Set aside approximately 60–90 minutes for your Weekly Review.

If this is your first review or your task system has become difficult to manage, it may take closer to one to three hours, and that's completely normal.

Work through the workbook in three stages:

Get Clear by capturing loose tasks, notes, and commitments;

Get Current by reviewing your calendar, projects, follow-ups, and upcoming responsibilities;

Get Creative by reflecting on your goals and capturing new ideas.

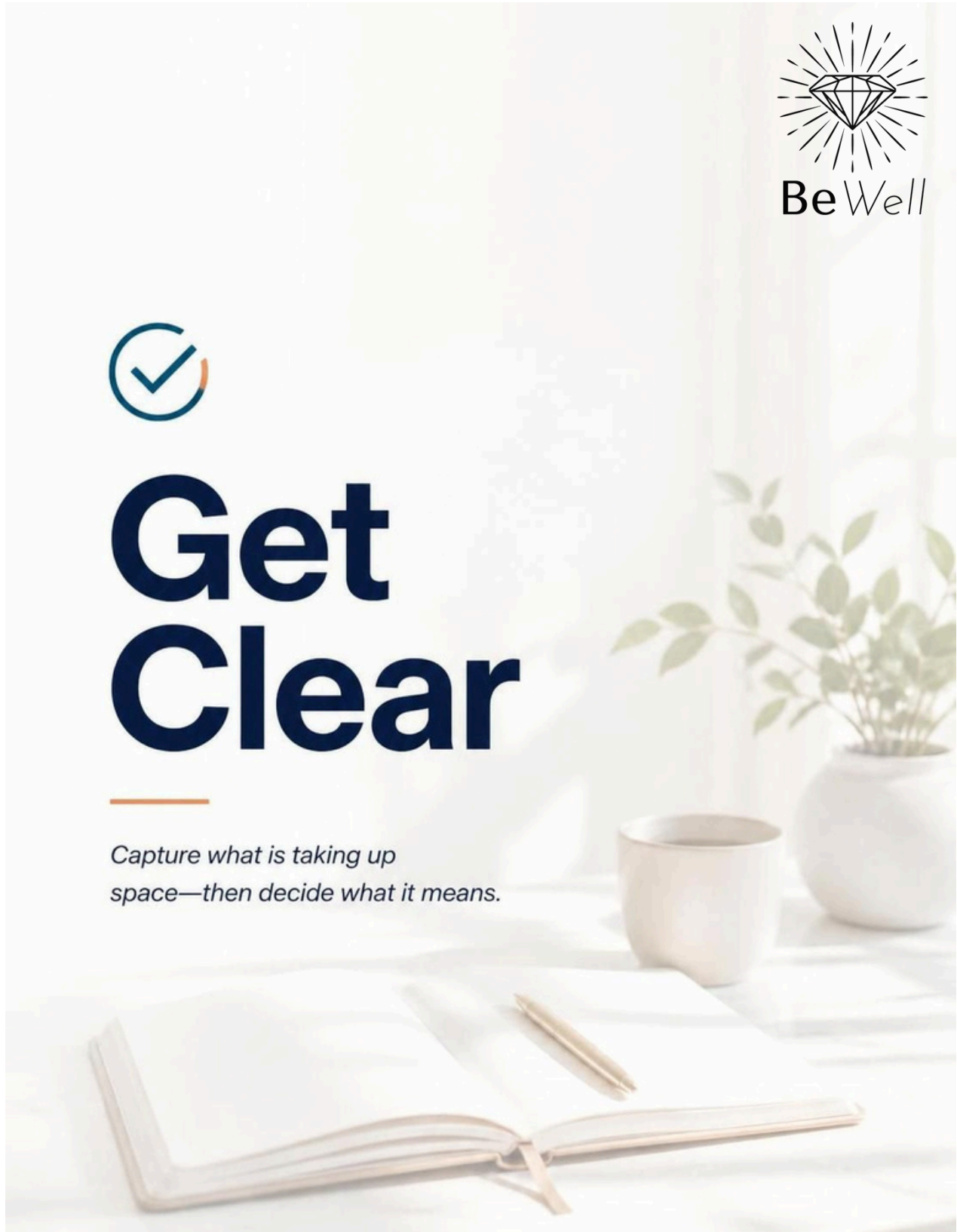
The purpose is not to complete more tasks during this time, it is to create a clear, trustworthy picture of what deserves your attention next.

Schedule your review at the same time each week, remove distractions, and give yourself permission to work through the process gradually. The more consistently you practice, the easier and faster it becomes and the more calm, clarity, and control you will carry into the week ahead.



Get Clear

*Capture what is taking up
space—then decide what it means.*



1. Clear the Surface

Gather loose materials before beginning your review.

Check each item as it is collected:

- ☐ Loose papers
- ☐ Receipts
- ☐ Business cards
- ☐ Meeting notes
- ☐ Journal pages
- ☐ Printed documents
- ☐ Voicemails or voice notes
- ☐ Emails requiring action
- ☐ Notes from conversations
- ☐ Other: _____

Materials to Process

Item or source	What does it require?	Where will it go?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Empty Your Head

Write down anything currently taking up mental space. Do not organize or solve everything yet. Capture it first.

Projects or Outcomes

What larger results are you committed to completing?

1. _____
2. _____
3. _____
4. _____
5. _____

NextActions

What specific actions need to be taken?

1. _____
2. _____
3. _____
4. _____
5. _____

Waiting For

What are you expecting from another person or organization?

1. _____
2. _____
3. _____
4. _____

Someday or Maybe

What ideas, possibilities, or interests might be worth revisiting later?

Other Open Loops

What else needs to be captured?

[illegible]

3. Process What You Collected

For each item, decide what it means and choose one destination.

- ☐ Delete or discard
- ☐ Do it immediately
- ☐ Add it to the Calendar
- ☐ Add it to Next Actions
- ☐ Add it to Projects
- ☐ Add it to Waiting For
- ☐ Add it to Someday/Maybe
- ☐ Store it as Reference
- ☐ Give it to someone else
- ☐ Add it to a checklist

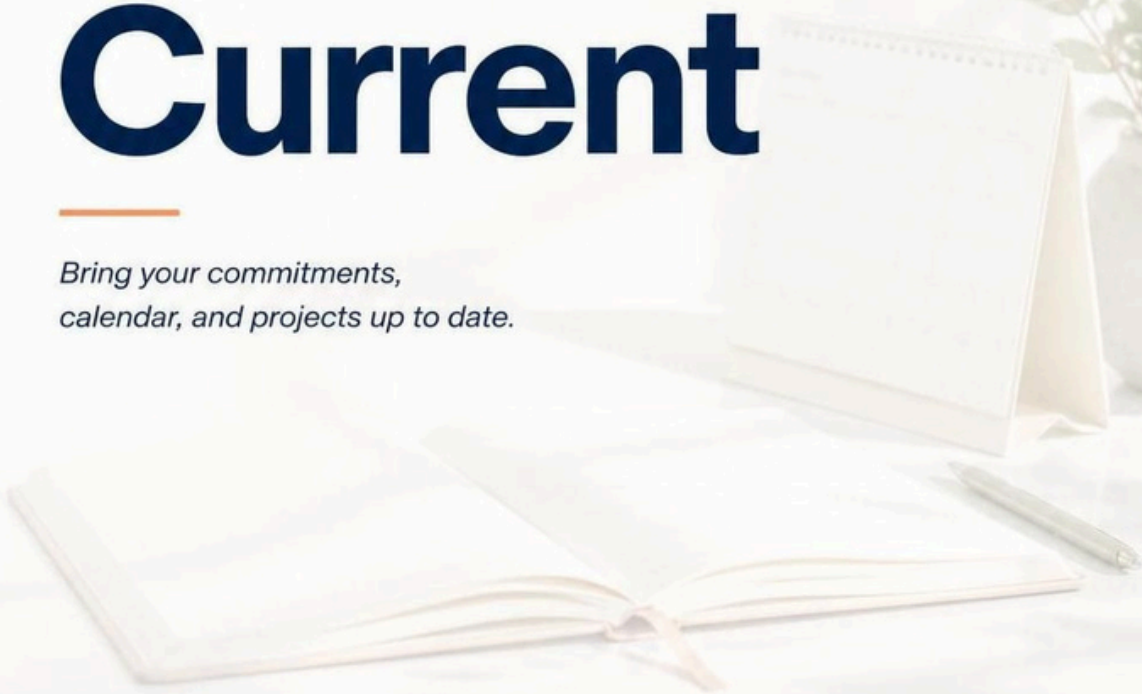
Processing Notes

[illegible]



Get Current

*Bring your commitments,
calendar, and projects up to date.*



Bring the System Up to Date

NextActions

Review your current action lists.

- ☐ Remove completed actions
- ☐ Rewrite unclear actions
- ☐ Add missing follow-up actions
- ☐ Remove actions that are no longer relevant
- ☐ Move actions to the correct context or list

Actions to Add or Revise

Previous Calendar

Review earlier calendar entries for unfinished business.

- ☐ Identify commitments that were not completed
- ☐ Capture follow-up actions
- ☐ Save useful information as Reference
- ☐ Remove items that no longer require attention

Follow-Up from Previous Dates

Date or Event	Follow-Up Needed

Upcoming Calendar

Review upcoming appointments, deadlines and events.

- ☐ Confirm dates and times
- ☐ Identify preparation actions
- ☐ Add travel, materials, or communication needs
- ☐ Capture actions triggered by upcoming events

Preparation Required

Date or Event	Preparation or Next Action

Waiting For

Review delegated items and pending responses.

- ☐ Mark received items as complete
- ☐ Record follow-up actions
- ☐ Contact people whose deadlines have passed
- ☐ Update expected dates
- ☐ Remove items that are no longer needed

Follow-Up List

Person or Organization	Item	Follow-Up Date

Projects

Review each active project separately.

For every project, confirm:

- ☐ The desired outcome is still accurate
- ☐ The project is still active
- ☐ A current next action is recorded
- ☐ Any relevant waiting items are tracked
- ☐ Supporting information is easy to find
- ☐ The project can be completed, deferred, or removed

Project Review

Project	Current outcome	Next action

Stalled Projects

Which projects have no clear movement?

What is the next visible action for each one?



Get Creative

*Make space for ideas, possibilities,
and meaningful new directions.*



Use Checklists as Triggers

Review any check lists that may reveal missing actions.

- ☐ Work responsibilities
- ☐ Home responsibilities
- ☐ Regular meetings
- ☐ Travel preparation
- ☐ Events
- ☐ Financial tasks
- ☐ Health-related tasks
- ☐ Maintenance tasks
- ☐ Other: _____

Actions Triggered by Checklists

Revisit Possibilities

Review your Someday/Maybe list without creating pressure to act.

For each item, decide whether to:

- ☐ Activate it as a Project
- ☐ Add a Next Action
- ☐ Add a Calendar reminder
- ☐ Keep it for later
- ☐ Remove it

Ideas Ready to Activate

Ideas to Keep for Later

Ideas to Remove

Create Space for New Ideas

Now that current commitments are visible, allow yourself to think expansively.

What would be interesting, useful, bold, or meaningful to explore?

New Possibilities

Decision

Where will it go?

•	
•	
•	
•	
•	

Which Ideas Belong in the System?

Idea



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Close the Review

*Confirm what is complete, clarify
what comes next, and finish with confidence.*

Close the Review

Before finishing, confirm that:

- ☐ Loose materials have been processed
- ☐ New commitments have been captured
- ☐ Calendar entries are accurate
- ☐ Next Actions are clear and actionable
- ☐ Every active project has a next action
- ☐ Waiting For items are current
- ☐ Someday/Maybe items have been reconsidered
- ☐ Reference material is stored where it can be found
- ☐ Unnecessary items have been deleted
- ☐ New ideas have been captured without creating unwanted commitments

Most Important Next Actions

1. _____
2. _____
3. _____

One Project I Will Move Forward

First Action I Will Take



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Next Steps

*Carry your clarity forward
with one meaningful action.*





Conclusion

This approach connects personal meaning with practical execution helps ensure that goals contribute to a worthwhile life with a proven framework that adds written commitment, prioritization, structured action, visualization and regular review.

Coaching designed around you

Your wellness journey does not have to begin with a complete life overhaul. As your Wellness Navigator and ally, I help you understand where you are, clarify where you want to go and help you create a practical path forward.

Together, we can explore:

- The habits, routines and patterns shaping your daily life
- What may be supporting or limiting your well-being
- Small, sustainable changes that fit your lifestyle
- Strategies for creating more balance, energy and focus
- Ways to stay accountable while practicing self-compassion
- How to turn your intentions into consistent action

This is about progress, awareness & creating habits that support the life you want to live.

Wherever you are in your journey, you don't have to navigate it alone. Together, we'll turn your intentions into a clear, personalized plan for moving forward.

Book your *free* **Discovery Call** to share your goals, explore your challenges & clarify the vision you have for your well-being. This relaxed, no-pressure conversation is an opportunity to ask questions, learn how wellness coaching works and discover what's possible.

I look forward to hearing from you.

Choose Well. Be Well.