

# SOUL CENTERED BLUEPRINT

THE 12-MONTH  
TOOLKIT

*a workbook by*  
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# SOUL CENTERED BLUEPRINT

What are you living for? When was the last time you asked yourself that question? Only when you spend time with that question can you start to gain a sense of direction and focus on your most important work. Build a genuinely intentional life by slowing down and engaging with a process that will support you to live with more clarity, joy, and fulfillment.

The natural turning of a season – be it a new year, a new phase or even an important new project is an excellent time to reflect and imagine desired outcomes into existence.

I've created an easy-to-implement yet game-changing way to create an annual plan to ensure your next 12 months are successful. Of course, this process can be done whenever you want to herald something new with more thoughtfulness and strategy, not just for the new year. The process will take anywhere from two hours to a half day – depending upon how deep you take it. You will need a journal and pen, a printout of the four parts in this toolkit, and/or your computer. Be sure to do this process in the order that it is outlined below, as each step informs the next.

There are four parts to this toolkit:

1. Reflect 2. Create 3. Support 4. Communicate & Manifest

## REFLECT



The reflection process is done in three steps and is based on the previous year's information and feedback.

1. Journal Questions 2. EQUUS Energy Audit  
3. Circles of Engagement

### **1. Journal questions - take some time to consider the previous year.**

**Write your answers to the following 11 questions:**

- What went well and why?
- What did not go so well and why?
- What did you accomplish in the year that you are most proud of?
- What challenges did you face?
- What important things did you learn that will inform the coming year?
- What loops do you need to close?
- What agreements in work or life feel too loose?

- What dreams have you had, but have yet to be given the time or energy towards?
- What stories did you tell yourself about those dreams that prevented you from actualizing them?
- If the present-day you could give the previous year you any advice, what would it be?
- Who do I want to thank before beginning the next 12-month phase?

## **2. EQUUS Energy Audit - do the following energy audit to see where your energy resources are taking you.**

# EQUUS ENERGY AUDIT

High-performers tend to meet life with a player (can-do) mindset. We often respond to stress by working longer hours, which eventually takes a toll on us physically, mentally, and emotionally. Over time, our levels of productivity actually go down, our levels of distraction go up, we become increasingly inefficient, and we push ourselves harder and harder to keep up. We cut corners in our relationships because there's no measurable impact from another hour spent with the family — but another hour in the office, well – we reason – that could result in something meaningful.

Jim Loehr and Tony Schwartz wrote a book, *The Power of Full Engagement - Managing Energy, Not Time, Is the Key to High Performance and Personal Renewal*. In a radical and important reframe Loehr and Schwartz reveal that where and how we spend our energy, not our time, is the key to getting things done and done well.

You see, time is a finite resource. There's a limit to how many hours you can work. But energy is different. Loehr and Tony Schwartz explain that your energy can be expanded and renewed by establishing specific rituals and behaviors that are intentionally practiced and precisely scheduled, to make them unconscious and automatic as quickly as possible. Here are the four kinds of energy:

- **Physical Energy:** you can increase your energy by moving your body more, drinking less alcohol, and getting more sleep.
- **Emotional Energy:** you can increase your energy by spending quality time with friends, having a date night with your partner, or saying “no” to anything that's not a “Hell Yes”.
- **Mental Energy:** you can increase your energy by only checking emails twice a day, reading books that have nothing to do with work, creating long stretches of time for deep work, or taking a walk to inspire new thinking.
- **Spiritual Energy:** you can increase your energy by spending time in nature, doing what nurtures your spirit, meditating, or connecting with values-shared people.

Nature teaches us that energy is precious. Expenditure of energy in the natural world is costly. For example, if a herd of horses expends energy unnecessarily, they may become someone's lunch. Evolutionary intelligence demands that all species conserve and increase power as much as possible.

In the spirit of wise leadership and evolutionary intelligence, taking an Energy Audit every six months is a good idea. This is a time to see where your energy is going and if it truly serves you. Are there places in your life where you are expending energy unnecessarily? Are there areas in your life where you could benefit from increasing your energy?



# EQUUS ENERGY AUDIT

## STEP 1

### WHAT **FILLS** ME WITH ENERGY

Make a list of all the people, places and things in your life that **FILL** you with energy. Add to the list any habits or rituals you have that energize you.

### WHAT **DRAINS** ME OF ENERGY

Make a list of all the people, places and things in your life that **DRAIN** you of energy. Add to the list any habits or rituals you have that exhaust you.

# EQUUS ENERGY AUDIT

## STEP 2

Once your list is complete, pick two to four key items in the right hand column that drains you of energy. Write them below:

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First of all, let's make it "right." If you are doing it, there's some kind of benefit for you, even if it doesn't make sense at first glance.

**Example:** I eat 4 cookies every night before bed, even though I want to lose weight. Eating cookies reminds me of growing up and fun times with my family.

Eating cookies is something fun and secret I can do after the family goes to bed.

Eating cookies is comforting.

(i) Why do you do it? What advantage does it have for you? What are its benefits?

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(ii) What could you do to remove this person, place or habit from the DRAINS of energy list and from your life altogether? For example, you could make sure you and your family do not have cookies in the house anymore.

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OR

(iii) What could you do to turn this person, place or habit into something that FILLS with energy? For example, you could create a ritual every weekend for your own private downtime that includes making healthy grain-free and sugar-free cookies, making enough that you can have one or two 'healthy home-baked' cookies a night instead of four store-bought unhealthy cookies a night.

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# EQUUS ENERGY AUDIT

DO THE FOLLOWING ENERGY AUDIT TO SEE WHERE YOU  
ENERGY RESOURCES ARE TAKING YOU.

What are the energy-giving areas in  
your life?

What are the energy-taking areas  
in your life?

What are the energies you are  
giving to others?

What are the life-giving energies  
you are wanting and needing but  
not getting (or receiving)?

# EQUUS ENERGY AUDIT

Notice the entire 'energy flow map' you have now created. The objective is to maximize the life - and energy-giving areas and minimize or eliminate the life - and energy-depleting areas in your life (personal and professional).

## **Journal on the following:**

- What is the impact that awareness has had on you?
- What does that awareness provoke?
- What changes do you need to make, and in what areas?
- Are there some assertions that need to be made:
  - Boundaries
  - New alliances or agreements
  - Sharing of impact
  - Giving feedback
  - Ending something

What are one or two action steps you will commit to making in the next two weeks that will dramatically shift your energy flow?



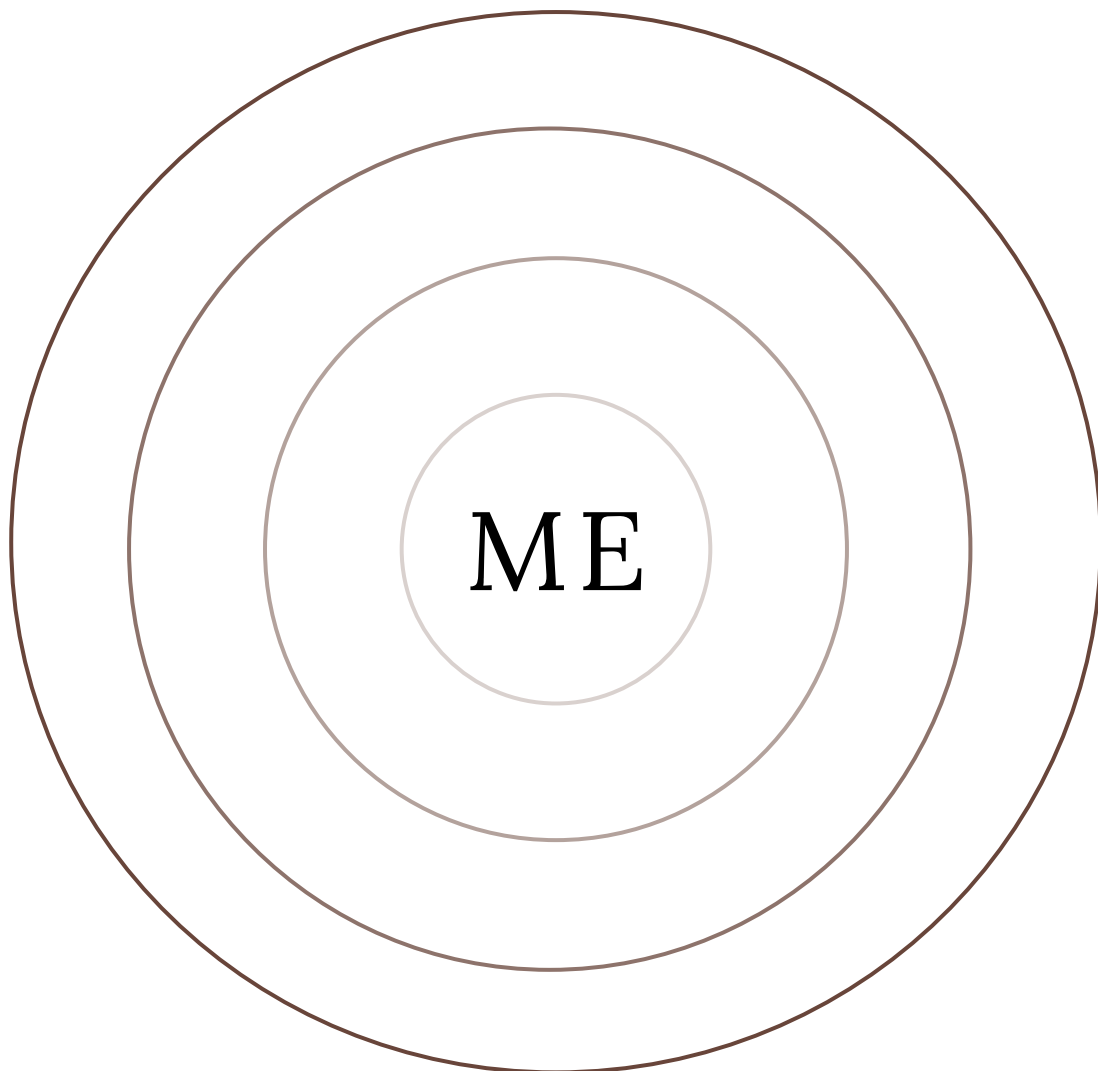


# CIRCLES OF ENGAGEMENT

See the worksheet below to chart your boundaries around people, projects and circumstances.

Design a 'circles of engagement' document. Based on your review of the previous two exercises, now take it a bit deeper. On a blank piece of paper, draw four concentric circles. In the center circle write "Me" (or your name). Now you are going to place various people and projects in your life within the various co-centric circles around your "Me" circle, according to priority. Place the people and projects in locations that feel authentic to where you want to expend your energy and prioritize.

Put high-priority people and projects in the circle just next to the center "Me" circle. For example, your children or a spouse might be in that location. You also might place "going to the gym" in that location. People and projects in the outermost circle are of the lowest priority and need more boundaries around them. These might be energy-draining circumstances or projects, or people who are toxic for you.



# CREATE

Using the reflection exercises above, you will start building your new year plan. This is done in four steps. Keep referring back to the reflection exercises as you do this portion of the plan.

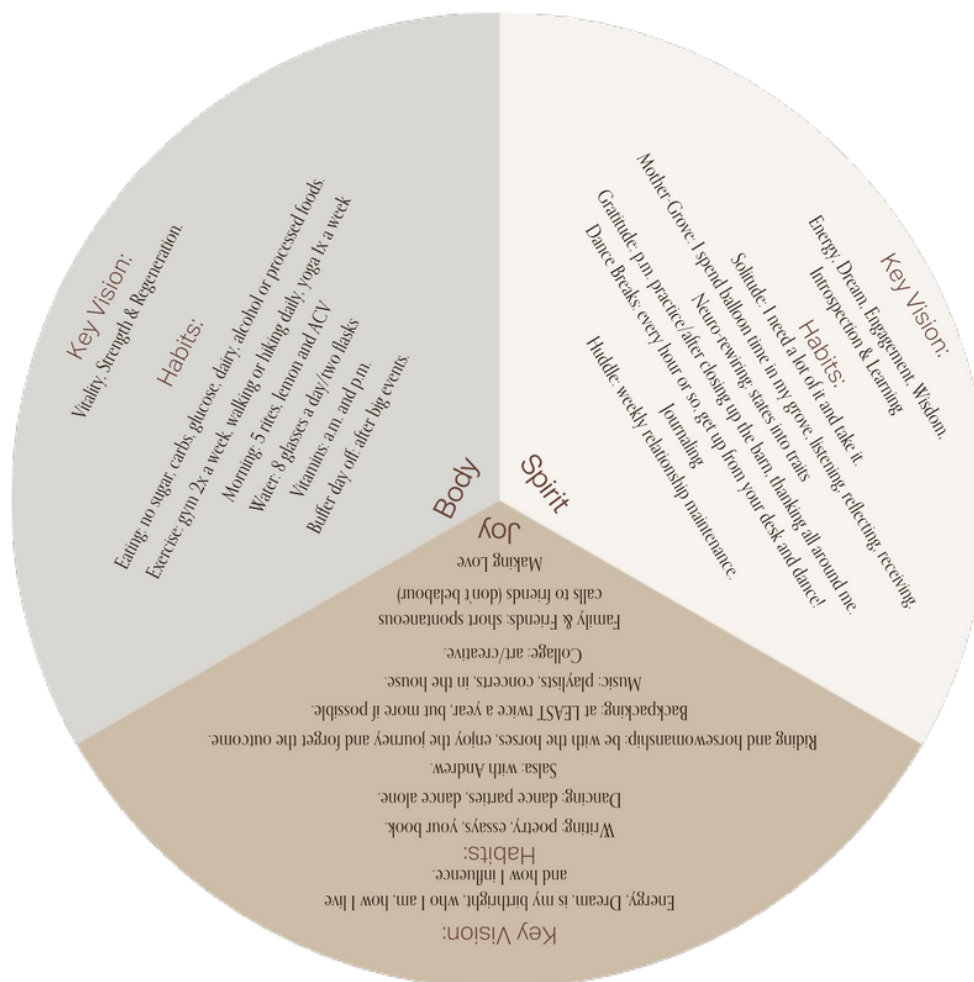
1. Self Care Plan 2. Yes's, No's, Maybes 3. Goal list 4. Journal questions

## SELF CARE PLAN

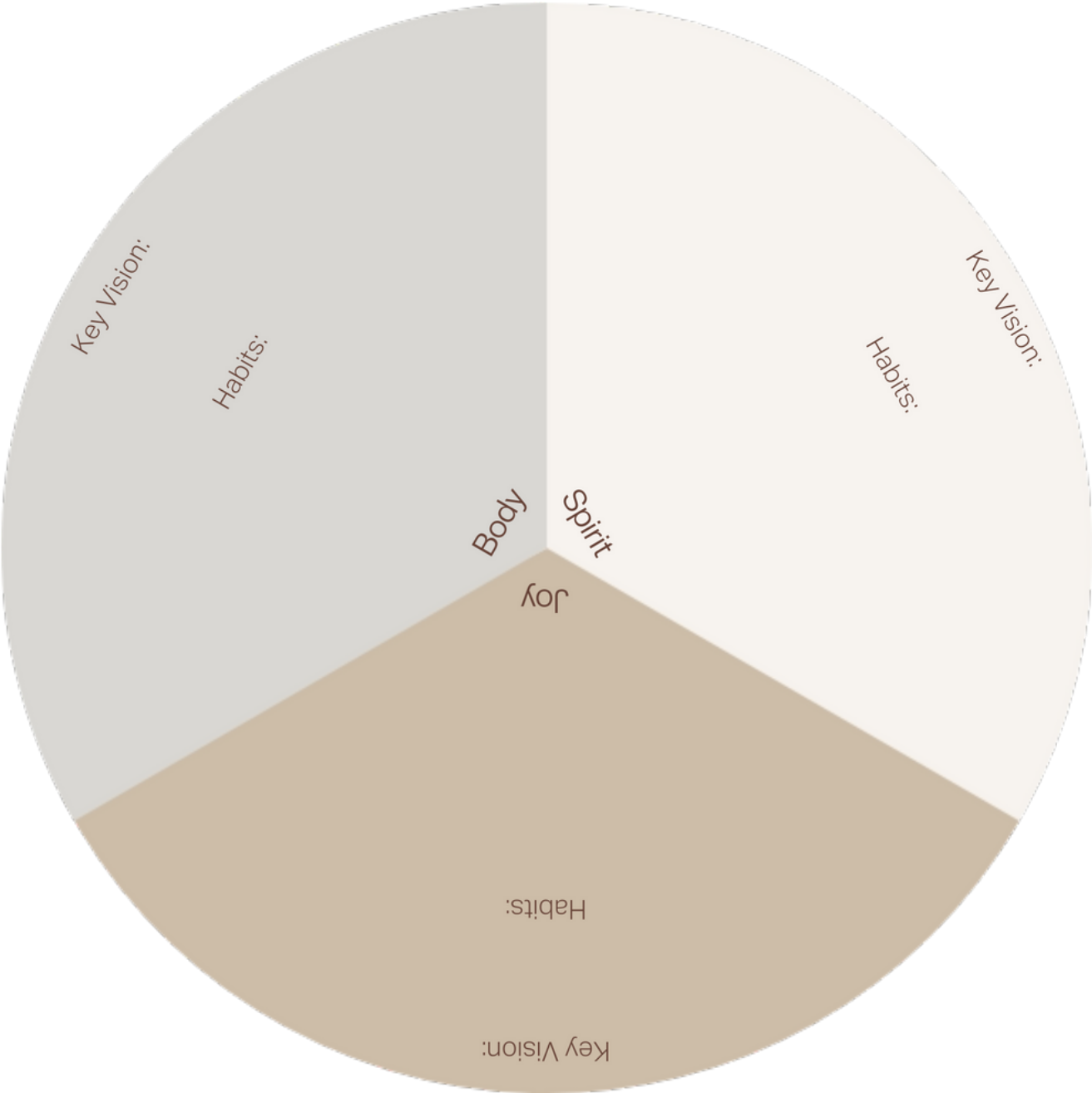
Create a self-care plan. You can't do anything worthwhile if you don't have the energy to do it. Energy is one of the foundational keys to success. So, create a plan that will ensure your vitality.

One of the simplest is to create a page with three columns. At the top, write these headers: Mind, Body, and Spirit. Under each column, write daily, weekly, and monthly habits that will support you to thrive in that area. For example, under Spirit, you may write down "daily meditation", and under Body, you might write down something like "gym 3x a week", and so on.

Make sure these are habits you can and will commit to. and put it somewhere that you will see it and follow it each day.



# SELF CARE PLAN



**2. What are your Yes / No's / Maybe's?** As informed by your reflection exercises above, this document is where you drill into more clarity about what you will and will not do in the coming year. Create a page with three columns. At the top, write these three headers: Yes, No, and Maybe.

Under the “Yes” heading, outline what you are sure you would like to do (or continue doing) in the coming year. Under the “No” heading, list the things you are clear you will not continue doing, and finally, under the “Maybe” heading, list the things you are not clear about yet.

**3. Make your Goals List** – Now that you’ve invested the time and energy in all the above exercises, you will notice that you are much clearer about your goals, objectives, and desired outcomes for the coming year. Write a list of between 6 and 12 goals you intend to accomplish.

- Be sure to put at least one thing down that, if you did it, “would change everything for you”-in other words, for example, it would change a limiting story you tell about yourself or would change how you feel about your job or would change your relationship for the better.
- Be sure to put at least one thing in your “dream” category.
- Ask yourself this powerful question: “What are you afraid of?” - and see what comes forward. Naming our fears allows us to see what we really want for ourselves.

**4. Journal Questions** - reflect on your list above – look over your list and journal on the following questions:

- What will your life look like after completing those goals and dreams?
- What will those accomplishments do for you?
- How will you feel after completing them?
- What will your life look like if you don’t make any changes?
- What do you feel you need the most help with to achieve them?
- Where could you get that help?

## SUPPORT



To make anything happen, we need structure and systems to set us up for success. These systems support our accountability on a daily, weekly, and monthly basis. Below are three ways to do that.

1.Wall Calendar 2.Planner 3. Apps

- 1. Wall calendar for the year** – having the entire year at a glance is important for high-level planning that will inform shorter-term planning throughout the year. Based on your Goals List above, now time block important “dates and gates” even if you don’t know the details yet. Dates are, of course, things with an exact timeframe (e.g., an overseas trip). Gates are various phases or stages of a project.
- 2. Planner** – I’m old-fashioned, and even though I use my digital calendar, I rely on an analog planner to slow down and think things through. There are lots of planners out there. My favorite is the Monk Manual because it focuses me in various ways – mentally and spiritually.
- 3. Apps** – Many apps have been developed to help you achieve your goals, whether you are a stay-at-home parent or the senior leader of an organization - ClickUp, Asana, Time Flow System, and Any.do are some, to name a few. And consider setting time limits when using one of these apps so it doesn’t become yet another time-sucking distraction.

## COMMUNICATE AND MANIFEST



Now for the final and perhaps most important phase of creating your plan. You might be tempted to skip this part, but don’t. It relies on the universal field of possibility that is all around you, wanting to support you in your endeavors.

This may sound like magical thinking, but it’s more evidence-based than that.

Through the two exercises below, you are igniting new neural pathways and pushing your thoughts, ideas, dreams, and ambitions into the collective intelligence of all of life.

1.Vision Board   2.Ritual

- 1. Vision board** – create a vision board for your upcoming year and the goals you will attain. Design it to imply that all of these outcomes have already happened. Depending upon your level of creativity, you can do this with magazine scraps, doodles, and images you find on the internet. The key is using color, shapes, and imagery that ignite a sense of pleasure and connection to your goals.

**2. Ritual** – there is no right or wrong way to do a ritual. It can be as simple as lighting a candle next to your vision board or as elaborate as going out into nature, calling in the four directions and ancestors, and making offerings of tobacco and corn meal. In whatever way works for you, take some time to “speak your dreams into existence” by naming them out loud within a context of sacredness and gratitude and asking for support.

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It's never too late or the wrong time to plan for success. Make this process fun! Put on inspiring music and light candles, lay out coffee and your favorite breakfast treat, silence your phone, and imagine what is possible. You could share this process with a friend or colleagues and do it together as an “Audacious Planning Party.” Make this process your own in any way that feels authentic to you.

The only way you could fail is by not planning at all.

*Do you want to up your goal-setting game? Get your upcoming year or your next project off to the right start. Engage Kelly in the comfort of your home through a virtual half-day Vision and Mission Retreat, where you will deeply dive into the above process and much more.  
Email Kelly at [Kelly@EQUUSinspired.com](mailto:Kelly@EQUUSinspired.com) for details.*

