

# **TRUE Insights**

# **Monthly review**

**Helping you reflect on your previous month, learn from what has worked well and what hasn't worked so well, and plan your following month**



# Welcome to your Monthly Review

**Welcome to your Monthly Review. Use it to help you reflect on your previous month, learn from what has worked well and what hasn't worked so well, and plan your following month.**

The guide has been designed to take you through the process, and includes:

- **Rolfe's Reflective Learning Cycle**

Use this to reflect on specific experiences you have recently had. You may want to create copies of this page to enable you to reflect on each new experience of the month.

- **Monthly progress**

Use this to review where things are at in terms of the different projects you have on (across all areas of your life).

- **Monthly reflection**

Use this to look back and celebrate the highlights, things that have helped you feel good, things you are grateful for and what you have learnt.

- **Your priorities**

Use this to review your current priorities in life and see if there are changes to be made to how you spend your time to better reflect your priorities.

- **Monthly focus**

Use this to choose the five key areas in your life and set yourself goals for the next month in each of those areas. The more specific you can be here, the better (How much? How often? When by?).

- **Mapping your priorities**

Use this to map your current priorities in terms of importance and urgency and help you during the month.

Each guide has a blank copy for you to complete, as well as a copy I've filled in as an example.

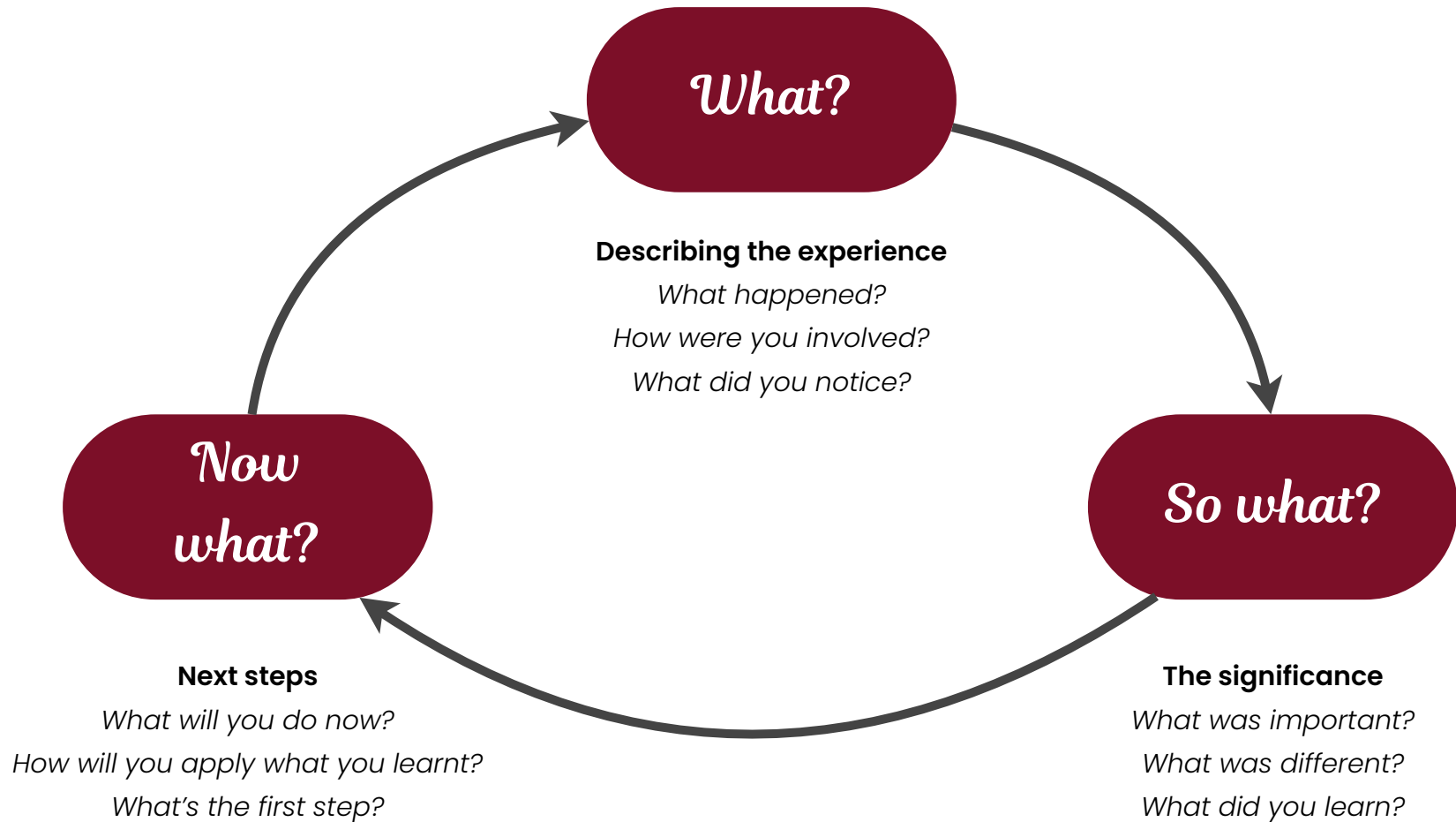
## Support

Join TLC for our monthly reflection and planning days to hold ourselves accountable. On the last working day of each month, we have live calls to share our experience with the monthly review and we can share our goals for the following month within the private Facebook group.

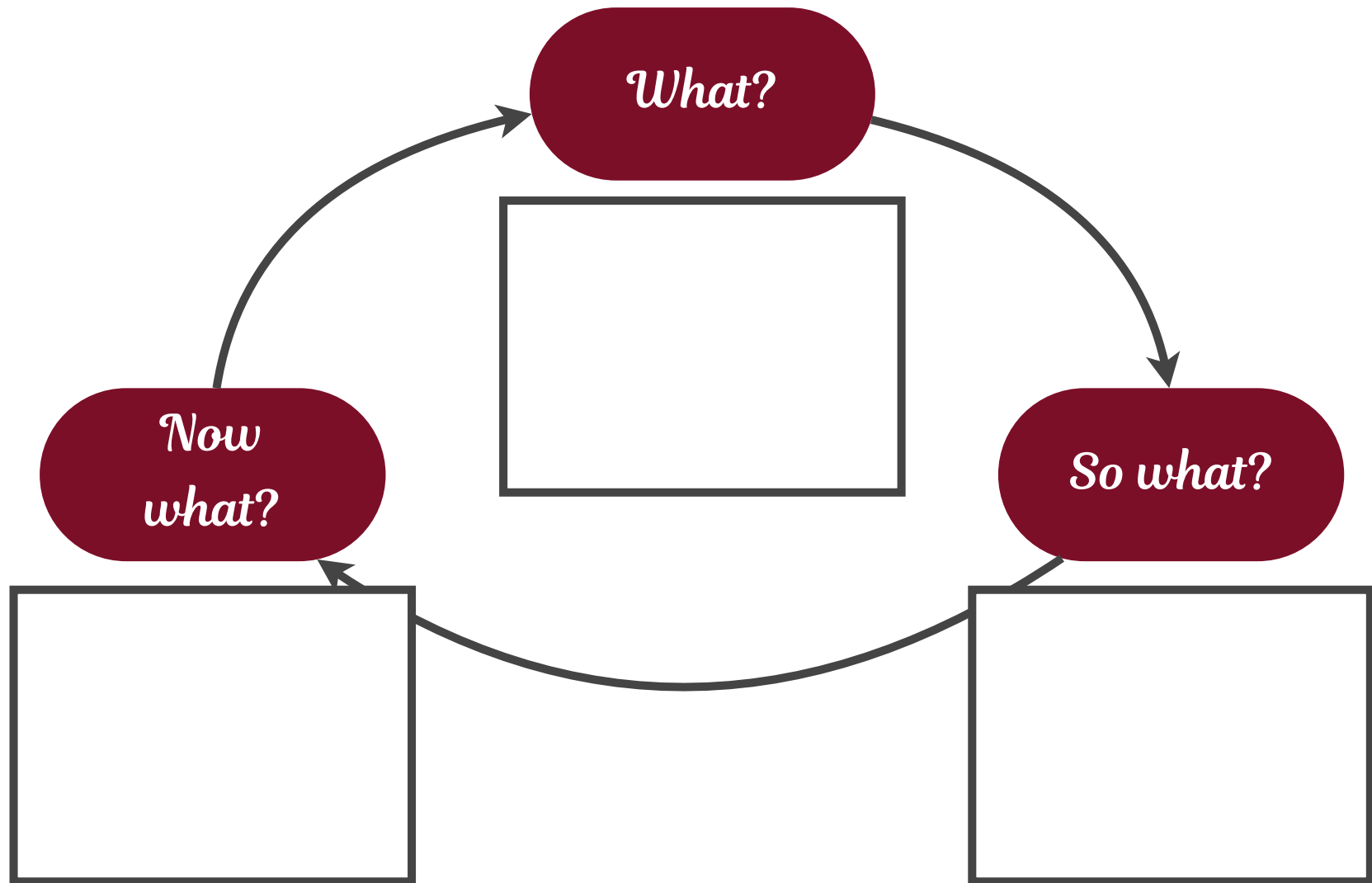
**<https://jowalley.co.uk/tlc/>**



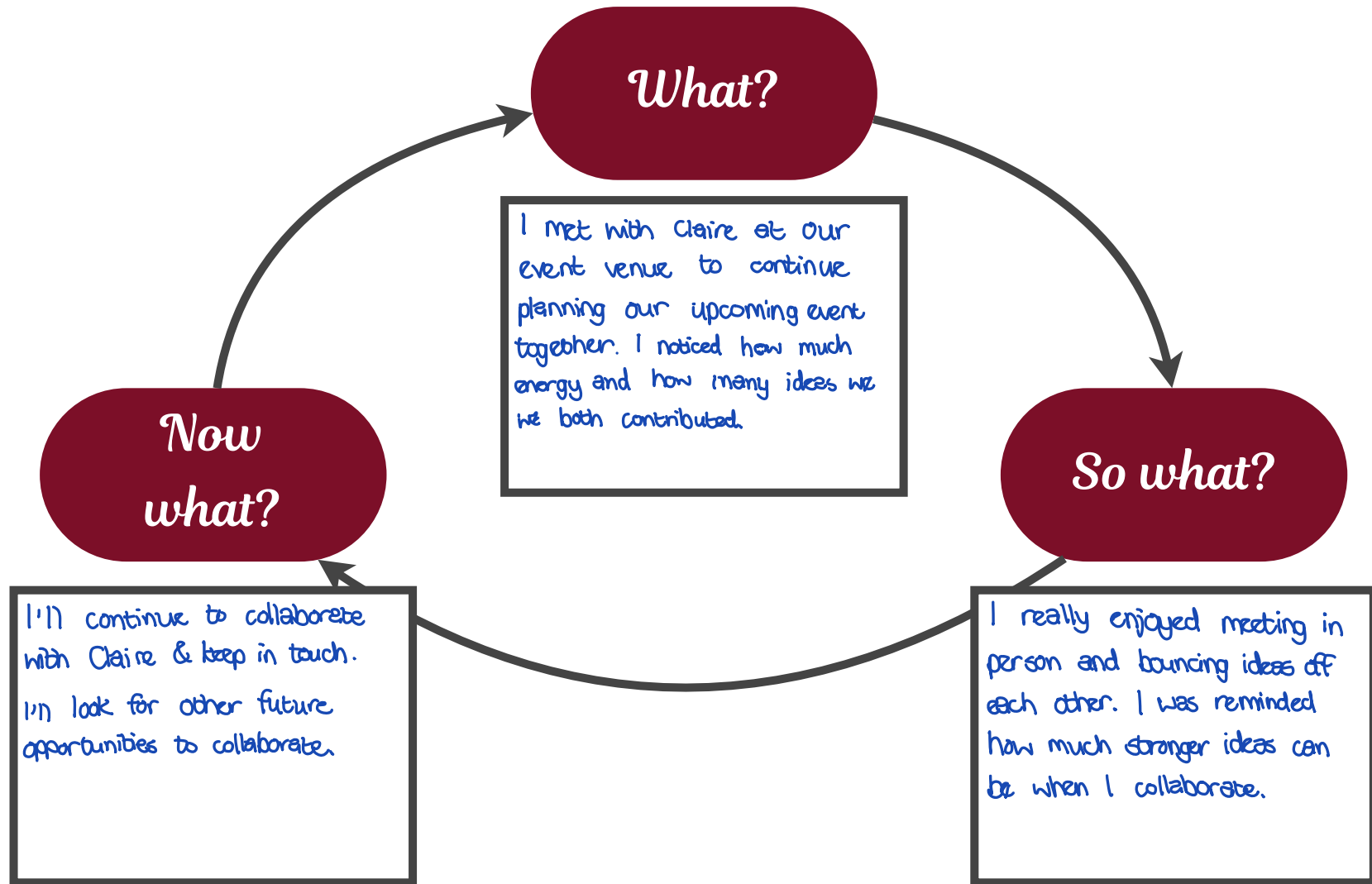
# Rolfe's Reflective Learning Cycle



# Rolfe's Reflective Learning Cycle



# Rolfe's Reflective Learning Cycle



# Monthly Progress

## What have you completed this month?

*This could be specific projects you have completed (in any area of your life) or things you've stopped doing.*

## What obstacles have you faced this month?

*This could be things that are within or outside of your control; things that have hindered you in some way.*

## What is still in progress?

*Include anything that has been started that is still important.*

## What could help me overcome the obstacles?

*These need to be things that are within your control.*



# Monthly Progress

## What have you completed this month?

*This could be specific projects you have completed (in any area of your life) or things you've stopped doing.*

I set up my social media & got branding sorted.  
My time in Level Up finished.  
I finished knitting a pair of socks (gifts) and a hat.

## What obstacles have you faced this month?

*This could be things that are within or outside of your control; things that have hindered you in some way.*

Commitments (time and money) that have hugely impacted me and caused me to panic.  
Lack of clarity about what to focus on business wise

## What is still in progress?

*Include anything that has been started that is still important.*

I am currently re-organising my stuff at home.  
I am developing my TRUE Insights offer.  
I am knitting a pair of socks (gifts).

## What could help me overcome the obstacles?

*These need to be things that are within your control.*

Keep track of how I am spending time and money.  
Keep committing to investing time and money into myself and the life I know I deserve.  
More detailed weekly business plans with an element of accountability.



# Monthly Reflection

## What have been your highlights this month?

*Think about times that you've really enjoyed, no matter how big or small they might seem.*

## What have you been grateful for this month?

*Again this could be big things or small things, and could be specific things or general things to be grateful for.*

## What has helped you feel good this month?

*Maybe things you've done for yourself or others have shared.*

## What have you learnt this month?

*This could be new learning or reminders of previous learning.*



# Monthly Reflection

## What have been your highlights this month?

*Think about times that you've really enjoyed, no matter how big or small they might seem.*

I really enjoyed my day out with my sister and my niece.  
I've enjoyed gradually sorting out my space so that things are clearer and more organised.  
I've enjoyed using social media more.  
I've enjoyed making new connections and nurturing existing ones (friends and business).

## What has helped you feel good this month?

*Maybe things you've done for yourself or others have shared.*

Being honest (with myself and others) about what is working in my business and what isn't working.  
Having the time and energy to support family and friends (practical and emotional support).  
Doing things within the business that excite me.

## What have you been grateful for this month?

*Again this could be big things or small things, and could be specific things or general things to be grateful for.*

The emotional support from family and friends during business challenges.  
Having a calm and comfortable home environment.  
Being able to go swimming and running.

## What have you learnt this month?

*This could be new learning or reminders of previous learning.*

That I need a balance of social time and alone time - including working with others, relaxing with others ...  
That I like starting new projects & learning new skills  
That I get easily distracted and can lose focus.



# Your Priorities

**What are your current priorities in life?**

**How much time would you ideally choose to dedicate to them, and how often?**

**Where might the balance be adjusted next month?**

*Are there things you are dedicating a lot of time to that aren't important to you, or very little time to things that are important to you?*



# Your Priorities

What are your current priorities in life?

Financial security from my business  
Family and friends (especially my nieces)  
Adventures  
Relaxation

How much time would you ideally choose to dedicate to them, and how often?

Seeing family / friends - once per week minimum  
Business development - one hour per working day  
Adventures - at least one per month  
Relaxation - one hour per day (ideally every day)

Where might the balance be adjusted next month?

Are there things you are dedicating a lot of time to that aren't important to you, or very little time to things that are important to you?

Make sure to schedule weekend time with nieces.  
Schedule an adventure (day out or overnight to a new place).  
Choose some new craft projects & books to relax with.  
Make a plan for business development and be clear on a focus for each week.



# Monthly focus

It's important to ensure you are honouring all parts of your life.

Think about each of the areas that are important in your life and consider where you would like to be in one month. You may choose to list specific actions that would benefit you.

**Area 1:** \_\_\_\_\_

**Area 2:** \_\_\_\_\_

**Area 3:** \_\_\_\_\_

**Area 4:** \_\_\_\_\_

**Area 5:** \_\_\_\_\_



# Monthly focus

It's important to ensure you are honouring all parts of your life.

Think about each of the areas that are important in your life and consider where you would like to be in one month. You may choose to list specific actions that would benefit you.

## Area 1: Jo Walley Coaching

Plan business development and have one area of focus for each week.

Make decision on futureproof Club.

Continue to commit to 2 social media posts per week.

## Area 2: Relationship

Commit to one block of quality time per week.

Plan an adventure for November or December.

## Area 3: Family & friends

Arrange child-friendly activities (at least two in month).

Continue spending quality time with nieces.

Block out time each week for family / friends.

## Area 4: Health

Continue swimming and running (3 x week minimum).

Continue batch cooking to ensure I always have easy meals.

## Area 5: Me time

Continue relaxing each day (use tracker).

Organise craft projects to focus on this month.

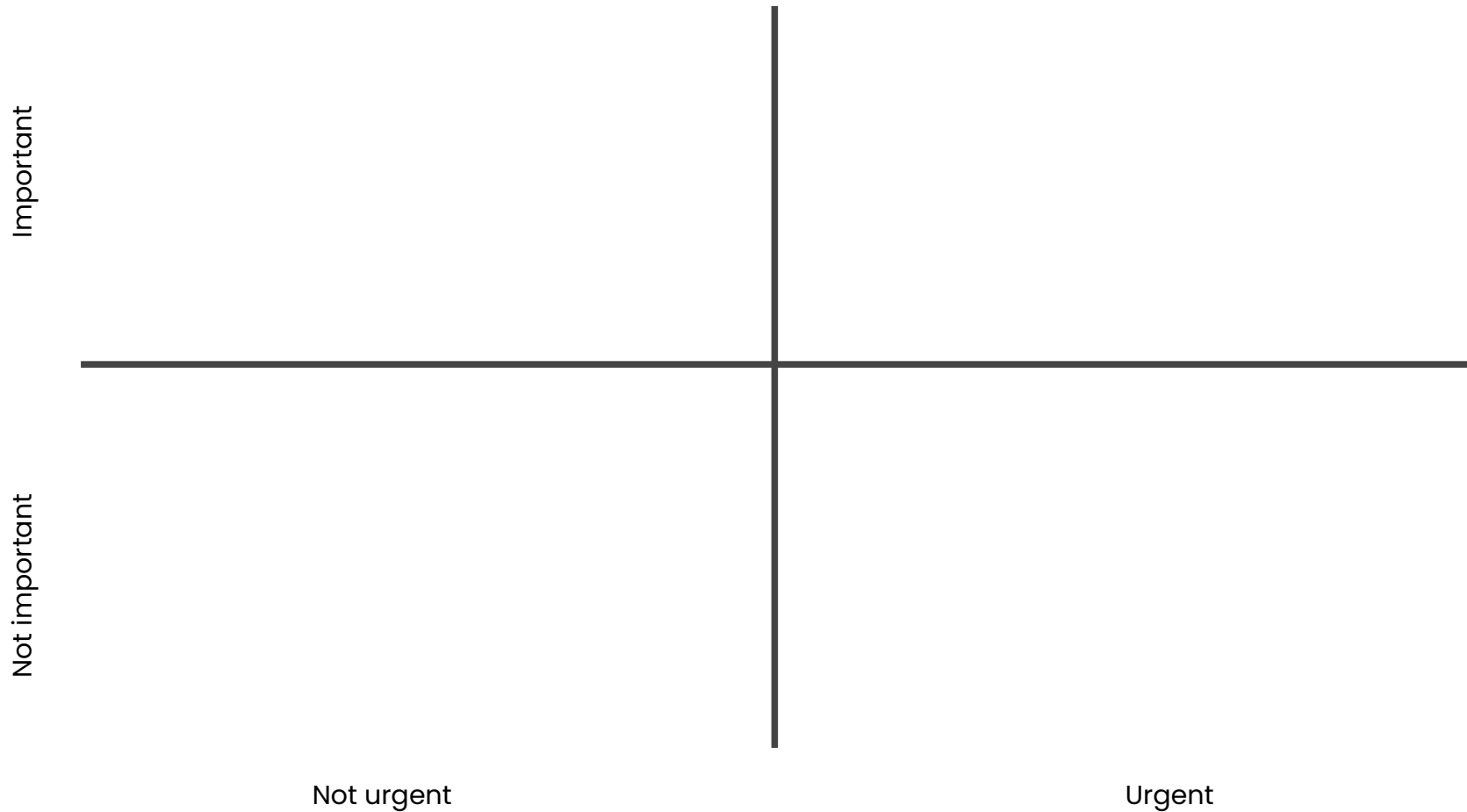
Make time for leisure reading and TV / films.



# Mapping your priorities

Map out your current ideas and projects in the grid below.

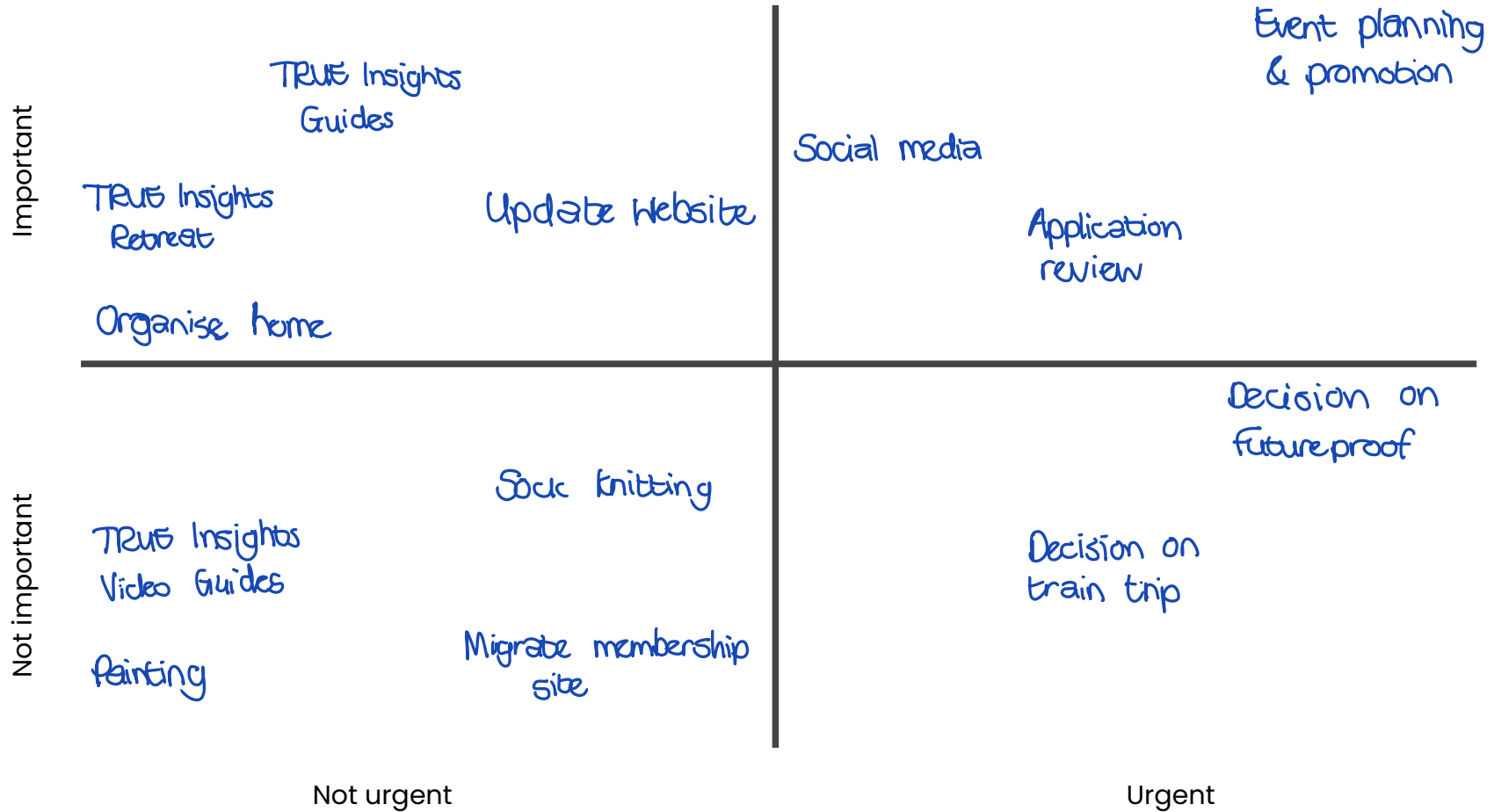
*Which are most important? Which are most urgent? Which need to be done by you?*



# Mapping your priorities

Map out your current ideas and projects in the grid below.

Which are most important? Which are most urgent? Which need to be done by you?



# Well done!

**Now you have everything you need to have an amazing month.**

**Help yourself stay on track by joining TLC  
and sharing your goals and intentions with us.**

**<https://jowalley.co.uk/tlc/>**

