

The goal is to identify areas for improvement, set goals for growth and celebrate what is working well in your life. Being honest with yourself is vital for this assessment to be impactful.

If this is overwhelming, please know that the discomfort is letting you know where you can be better and that change isn't easy, but you are worth it!

get started...

_____ **PERSONAL VALUES • How well do your actions aligned with your values?** (score 1-5, 5 being the best)

What are your top 5 core values? What is most important to you? (ie. respect, honesty, communication)

___Y ___N Are there any actions you want to change to better align with your values?

If you answered yes, list what actions you would like to change.

_____ **HEALTH & WELLNESS** (score 1-5, 5 being the best)

___Y ___N Are you exercising regularly? ___Y ___N Are there any health issues you need to address?

___Y ___N Are you eating healthy? ___Y ___N Are you managing stress & emotions effectively?

___Y ___N Are you drinking enough water? ___Y ___N Are you getting enough quality sleep?

_____ **CAREER & EDUCATION** (score 1-5, 5 being the best)

___Y ___N Are you satisfied with your current job or career path?

___Y ___N Do you have career goals or aspirations?

___Y ___N Are you continuously learning and developing new skills?

___Y ___N Are there areas of knowledge you want to expand?

_____ **FINANCIAL WELL-BEING** (score 1-5, 5 being the best)

What are your financial goals, including savings, investments, and debt management?

___Y ___N Are you managing your finances effectively?

___Y ___N Do you have a budget in place?

___Y ___N Do you have an emergency fund for unexpected expenses?

____ **RELATIONSHIPS** (score 1-5, 5 being the best)

___Y ___N Do you have good relationships with family members?

___Y ___N Are there any unresolved conflicts?

___Y ___N Are you actively participating in a social support network?

___Y ___N Are you investing in and maintaining friendships?

___Y ___N Are you satisfied with your current or potential romantic relationships?

___Y ___N Do you have healthy communication and boundaries?

____ **TIME MANAGEMENT** (score 1-5, 5 being the best)

___Y ___N Are you managing your time and daily routines well?

___Y ___N Are you setting priorities and achieving your goals efficiently?

____ **GIVING BACK** (score 1-5, 5 being the best)

___Y ___N Are you contributing to your community or society?

___Y ___N Are you involved in volunteer work or charitable activities?

____ **PERSONAL GROWTH** (score 1-5, 5 being the best)

___Y ___N Are you pursuing hobbies and interests that bring you joy?

___Y ___N Are there new interests you'd like to explore?

___Y ___N Are you actively seeking opportunities for personal growth and learning?

___Y ___N Do you have clear personal development goals?

____ **EMOTIONAL WELL-BEING** (score 1-5, 5 being the best)

___Y ___N Do you understand and manage your emotions well?

What strategies do you use to cope with stress?

CONGRATULATIONS!

you completed the assessment!

your life overall score is:_____

now what?

It is recommended to save copies of this assesment and complete it monthly to track your improvement. On the next pages you will find tips for creating and executing a plan as well as space to take notes. **Don't stop now! Your new and improved life is that much closer.**

Your future self is thanking you.

ideal take away...

Hopefully you feel empowered by taking an honest look at all areas of your life. Next take a moment to reflect on what you are pleased with as-is, what you are happy with and want to do more of, and what is not working that you would like to improve.

Taking responsibility for your life, rather than blaming your situation or feeling stuck, allows for change. This is your life and your choices, whether you realize it or not. Choose wisely.

DEFINE YOUR #1 GOAL FOR CHANGE

After completing the assessment, what 1 change could you make that would significantly change your life for the better. Clearly state your goal below. Make your objective specific, measurable, achievable, relevant, and time-bound (SMART). Write the goal in present tense as if it is already complete.

EXTRA CREDIT: Read your goal aloud. Visualize your life now that you have reached the desired goal. Ask yourself: How do I feel? What impact does the change have on my life? Practice this visualization often and really see, think, and feel as your future self.

RESEARCH

Research who has done what you want to do successfully and find out how they did it. This could be calling a friend, researching videos online, or reading a book. List below what research you can and then schedule in your phone with a calendar item or reminder when you can do it.

EXTRA CREDIT: Schedule the task(s) in your phone calendar or reminder when you can do it.

DEVELOP A STRATEGY

Now that you have done the research of what success looks like, create a strategic approach that outlines the high-level actions and methods you'll use to achieve your goal. Consider what resources you'll need and how you'll allocate them.

SET A TIMELINE WITH ACTIONABLE STEPS

Create a timeline that outlines key milestones, deadlines, and the overall timeframe for your goal. This is a biggie because you need to hold yourself accountable to keep to this timeline.

EXTRA CREDIT: Write the timeline down and keep it visible to keep you focused with clarity.

ANTICIPATED CHALLENGES & OBSTACLES

Identify potential obstacles that could hinder your strategy below and also note a plan to get around these challenges. Delays can happen, that's life, but preparing for them will set you up for success.

ADJUST & PIVOT

If circumstances change, be prepared to adapt your plan as needed. Flexibility is important for successful execution.

TRACK & EVALUATE

Schedule daily/weekly/monthly tracking to note your progress. Evaluate whether you are on track to meet your timeline goals. Use key performance indicators (KPIs) to measure success. Note below when and how you will track your progress.

CELEBRATE ACHIEVEMENTS

Recognize and celebrate milestones and achievements to maintain motivation and morale.

REACH YOUR GOAL & REFLECT

Once you've achieved your goal, reflect on what you have learned. Analyze what worked, what didn't, and what you can learn for future plans.

CONTINUOUS IMPROVEMENT

With each goal you complete you will gain confidence in your ability to grow and create the life you desire. The learning that is required for each goal is growing you to be a new and improved you. By completing this assessment and primary goal plan regularly you will find that the discomfort of getting out of your comfort zone is worth it when you see the results.

Note: Be flexible with your timeline and give yourself grace through the challenges. Remember to keep going. Failure only exists when you quit.