

My Life Self-Assessment

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Name: _____

Date: _____

Start with where you are. Today.

The “My Life Self-Assessment” is a tool that has you evaluate your life in eight (8) areas – Work/Career/Education, Money/Finances, Lifestyle/Social, Family/Friends/Relationships, Personal Growth/Self-Practice, Health/Well-Being, Recreation/Fun, and Religion/Spirituality – to see what areas are working well for you and identify areas where you might need to make changes. Take a few minutes to evaluate yourself on two things: (1) how important each area is to you (score of 1 to 5), and (2) grade yourself on how you feel you are doing (or not doing) in each area (score of A to F). (Note: If you find that you don’t want to invest time or not interested in a particular category, give your NA for the Importance and NG for the grade.) As you do this activity, be as TOTALLY honest with yourself as possible. The goal of the My Life Self-Assessment is to identify areas that are working well for you, as well as areas that might be holding you back – and keeping you from moving forward in your life. The Categories (and brief descriptive words):

Category	Examples
Work/Career/Education	Degrees, job/vocation, entrepreneurship, homemaker, professional organizations
Money/Finances	Debt, retirement, savings, income, expenses, benefits, taxes, budget, philanthropy
Lifestyle/Social	Clothing, housing, vehicles, electronics, community work, self-image, freedom
Family/Friends/Relationships	Parents, spouse/life partner, siblings, children, relatives, co-workers, pets, caretaker
Personal Growth/Self- Practice	Life purpose, goals/dreams, success, managing life, organization, habits, rituals
Health/Well-Being	Physical, mental, relaxation, exercise, diet/nutrition, happiness, stress, pleasure
Recreation/Fun	Travel, adventure, sports, music, arts/crafts, hobbies, writing, play, cooking
Religion/Spirituality	Religious practice, readings/scriptures, faith, worship, meditation, mindfulness

Use the scale below to rate the importance for each category as well as how well you’re doing in that particular area:

Importance – Is this category important to me?

Grade – How do I feel about my life in this category?

- 1 = Extremely Important – Think/do all the time.
- 2 = Very Important – Think/do several times a day.
- 3 = Important – Think/do once a day.
- 4 = Somewhat Important – Think/do a few times a week.
- 5 = Not important at all – Rarely think/do this area.
- NA = Not applicable to my life right now

- A = Extremely Satisfied – Every day is a great day!
- B = Satisfied – Life is good in this area on most days.
- C = Average – Mixture of good days and bad days.
- D = Fair – I’m barely getting by in this area.
- F = Poor – My life in this area really sucks!
- NG = No grade – Not applicable to my life.

Work/Career/Education	Part 1: Importance _____	Part 2: Grade: _____
Money/Finances	Part 1: Importance _____	Part 2: Grade: _____
Lifestyle/Social	Part 1: Importance _____	Part 2: Grade: _____
Family/Friends/Relationships	Part 1: Importance _____	Part 2: Grade: _____
Personal Growth/Self-Practice	Part 1: Importance _____	Part 2: Grade: _____
Health/Well-Being	Part 1: Importance _____	Part 2: Grade: _____
Recreation/Fun	Part 1: Importance _____	Part 2: Grade: _____
Religion/Spirituality	Part 1: Importance _____	Part 2: Grade: _____

After reflecting on the above, what Grade would you give yourself regarding your life in general (circle one)?

- A+ A A- B+ B B- C+ C C- D+ D D- F+ F

Briefly explain why you gave yourself this overall grade.

Now that you have a little more insight into your life, here's your opportunity to identify what's working and what's not working. As you review the eight categories, where are you doing well, maybe even thriving? What categories are more of a challenge for you – at least those areas that matter to you? If you find that it's too hard to focus on all eight categories, just start with the big three - Health/Well-Being, Family/Friends/ Relationships, and Work/Career/Education. Use the space below to share a few thoughts.

Now that you have identified what's working and what's not working, here's your opportunity to name one or two specific actions you can take to design your life. For each of the eight categories write down at least one thing you are willing to commit to in order to improve. Here are a few examples that may help get you started:

- Work/Career/Education – I will identify my list of potential majors by the end of the month.
- Money/Finances – I will save at least \$1 per week to create an emergency fund account.
- Lifestyle/Social – I will disconnect from my phone at 9pm every night (and connect again 8am the next day).
- Family/Friends/ Relationships – I will spend at least 60 minutes per day doing something fun with kids.
- Personal Growth/Self-Practice – I will drink at least four 8oz glasses of water every day.
- Health/Well-Being – I will take a minimum of a 20-minute walk in nature every day.
- Recreation/Fun – I will learn pickleball within the next 30 days and play at least once a week after that.
- Religion/Spirituality - To read at least one scripture every day to get closer to my higher power.

Write down at least one idea that you're willing to commit to for the next 30 days in the space below:

- Work/Career/Education: _____
- Money/Finances: _____
- Lifestyle/Social: _____
- Family/Friends/ Relationships: _____
- Personal Growth/Self-Practice: _____
- Health/Well-Being: _____
- Recreation/Fun: _____
- Religion/Spirituality: _____

As you list your idea, ask yourself these questions:

1. What issue/challenge will keep me accomplishing my goal?
2. What will I do if this issue/challenge comes up?
3. Who can I get to hold me accountable to accomplish this change?
4. Am I willing to pay the price to take on this change?