

## The Life Categories Self Evaluation

This evaluation is designed to establish a baseline for the life you have as you begin your coaching.

Months or years after completing your first Life Categories Self Evaluation, you can complete another one and then go back and compare the differences.

Complete the Life Categories Self Evaluation in 6 steps.

- |                                   |              |
|-----------------------------------|--------------|
| 1. The Evaluation                 | Pages 2 - 24 |
| 2. What would you like to change? | Page 25      |
| 3. First Steps                    | Page 27      |
| 4. The Benefits of Change         | Page 30      |
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Step 1, The Evaluation includes 10 categories of your life;

- Physical
- Intellectual
- Emotional
- Financial
- Professional
- Environmental
- Recreational
- Social
- Spiritual
- Significant Other

Be sure to note the date that you complete each category. There are 10 statements per category. Rate your level of agreement with each statement from 1 (Completely Disagree) to 10 (Completely Agree). Then describe the current facts related to each statement. Add up all your statement ratings in a category and then average them out.

After finishing all 10 categories, plot them on the Life Wheel on page 24. Mark a dot in each category of the Life Wheel and then connect the dots.

Give yourself plenty of time to complete Step 1. Clients report that each category takes from 15 to 30 minutes to complete.

After completing Step 1, read the instructions and complete the other 5 Steps. Completing the Life Categories Self Evaluation, identifying the areas you would like to change, taking actions to make those changes and partnering with someone for accountability will get you off to a great start with your coaching.

Date \_\_\_\_\_

Category: **Physical**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		<i>I am happy with my body weight</i>
<i>The facts related to this are:</i>		
2		<i>I am happy with how I feel physically.</i>
<i>The facts related to this are:</i>		
3		<i>I am free of harmful physical habits. Consider nicotine, alcohol, caffeine, prescription medication, marijuana, sex, pornography, gambling, eating, etc.</i>
<i>The facts related to this are:</i>		
4		<i>Rate your well-being. Consider your state of physical health including oral, vision, digestive, immune system, chronic physical issues. (1 Low, 10 High)</i>
<i>The facts related to this are:</i>		
5		<i>I have a diet that supports my health and ideal body weight.</i>
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		When I look in the mirror I approve of what I see.
<i>The facts related to this are:</i>		
7		I am satisfied with my level of strength and endurance.
<i>The facts related to this are:</i>		
8		I have a healthy and balanced exercise program.
<i>The facts related to this are:</i>		
9		I am getting enough sleep to support my health and well-being.
<i>The facts related to this are:</i>		
10		I have an ample supply of energy throughout the day.
<i>The facts related to this are:</i>		

	<b><i>Physical Category Total</i></b> <i>(add all 10 ratings)</i>
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	<b><i>Physical Average Rating</i></b> <i>(Divide the total by 10)</i>
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Date \_\_\_\_\_

Category: **Intellectual**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I am learning as much as I want to learn.
<i>The facts related to this are:</i>		
2		I think of myself as intellectually capable.
<i>The facts related to this are:</i>		
3		I am comfortable with using technology to expand my possibilities.
<i>The facts related to this are:</i>		
4		I am satisfied with the time I devote to my intellectual interests.
<i>The facts related to this are:</i>		
5		I am satisfied with my proficiency in spelling, grammar, and vocabulary.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I think of myself as smart enough.
<i>The facts related to this are:</i>		
7		I am competent in problem solving.
<i>The facts related to this are:</i>		
8		I trust my own thinking.
<i>The facts related to this are:</i>		
9		I utilize a good balance of facts and emotions when making decisions.
<i>The facts related to this are:</i>		
10		It is easy for me to absorb and assimilate new ideas.
<i>The facts related to this are:</i>		

	<b><i>Intellectual Category Total</i></b> (add all 10 ratings)
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	<b><i>Intellectual Average Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Emotional**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I am capable of authenticity.
<i>The facts related to this are:</i>		
2		I know that I am responsible for how I feel.
<i>The facts related to this are:</i>		
3		It is easy to allow myself to feel my emotions.
<i>The facts related to this are:</i>		
4		I am clear about and comfortable with a broad range of emotions.
<i>The facts related to this are:</i>		
5		I am comfortable allowing others to express themselves when they are emotional.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I am comfortable in the presence of appropriate conflict.
<i>The facts related to this are:</i>		
7		I know how to resolve emotional pain in a healthy way.
<i>The facts related to this are:</i>		
8		What rating would your closest friends give you for emotional maturity? (1 low and 10 high)
<i>The facts related to this are:</i>		
9		I am comfortable with being vulnerable.
<i>The facts related to this are:</i>		
10		I easily tolerate emotional discomfort.
<i>The facts related to this are:</i>		

	<b><i>Emotional Category Total</i></b> <i>(add all 10 ratings)</i>
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	<b><i>Emotional Average Rating</i></b> <i>(Divide the total by 10)</i>
--	--

Date \_\_\_\_\_

Category: **Financial**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I manage my money well.
<i>The facts related to this are:</i>		
2		I am satisfied with my financial health.
<i>The facts related to this are:</i>		
3		I have a financial plan for the future.
<i>The facts related to this are:</i>		
4		I am making satisfactory progress toward my financial plan.
<i>The facts related to this are:</i>		
5		I value myself and others equally regardless of financial status.
<i>The facts related to this are:</i>		



Stmt #	Rating	Statement
6		I have a clear picture of my financial status.
<i>The facts related to this are:</i>		
7		I have a healthy relationship with money.
<i>The facts related to this are:</i>		
8		I am satisfied with how I go about obtaining money.
<i>The facts related to this are:</i>		
9		I use and manage debt responsibly.
<i>The facts related to this are:</i>		
10		I am generous with my money, sharing an appropriate amount after meeting my own needs.
<i>The facts related to this are:</i>		

	<b><i>Financial Category Total</i></b> <i>(add all 10 ratings)</i>
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	<b><i>Financial Average Rating</i></b> <i>(Divide the total by 10)</i>
--	--

Date \_\_\_\_\_

Category: **Professional**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I am happy with my professional growth.
<i>The facts related to this are:</i>		
2		I am satisfied with my current career path.
<i>The facts related to this are:</i>		
3		I love what I do for a living.
<i>The facts related to this are:</i>		
4		I have a strong sense of purpose associated with my job, business, or career.
<i>The facts related to this are:</i>		
5		My professional contributions are making a positive difference in the world.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I am engaged in ongoing improvement in my profession.
<i>The facts related to this are:</i>		
7		I am organized and efficient in my profession.
<i>The facts related to this are:</i>		
8		After my time off, I am energized when I consider my return to the activity of my profession.
<i>The facts related to this are:</i>		
9		I spend most of my time at work in activity that I love doing or that comes easily and holds my interest.
<i>The facts related to this are:</i>		
10		My job and career are good fits for me.
<i>The facts related to this are:</i>		

	<b><i>Professional Category Total</i></b> <i>(add all 10 ratings)</i>
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	<b><i>Professional Average Rating</i></b> <i>(Divide the total by 10)</i>
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Date \_\_\_\_\_

Category: **Environmental**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I am happy with the space that I call home.
<i>The facts related to this are:</i>		
2		When I am at home I feel safe.
<i>The facts related to this are:</i>		
3		When I am at home I feel supported.
<i>The facts related to this are:</i>		
4		I like the furnishings in my home.
<i>The facts related to this are:</i>		
5		There is harmony at home in all of my relationships.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I am happy with the people I work with and work around.
<i>The facts related to this are:</i>		
7		My workplace environment supports my success.
<i>The facts related to this are:</i>		
8		I am happy with the commute to work and the location of my workplace.
<i>The facts related to this are:</i>		
9		I like the neighborhood I live in.
<i>The facts related to this are:</i>		
10		I love the community I live in.
<i>The facts related to this are:</i>		

	<b><i>Environmental Category Total</i></b> (add all 10 ratings)
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	<b><i>Environmental Avg Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Recreational**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I look forward to vacations.
<i>The facts related to this are:</i>		
2		I spend my vacations playing and recreating.
<i>The facts related to this are:</i>		
3		When I am on vacation, I relax and rarely think about work.
<i>The facts related to this are:</i>		
4		During the week, I often take time for recreational activities.
<i>The facts related to this are:</i>		
5		I have enough play time in my life.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I have a healthy balance of work and play.
<i>The facts related to this are:</i>		
7		After periods of heavy energy expenditure, I take time to recover rather than pushing myself to do more.
<i>The facts related to this are:</i>		
8		I allow myself enough time for entertainment and recreation.
<i>The facts related to this are:</i>		
9		I have a go-to hobby or interest that I engage in to relax and recharge.
<i>The facts related to this are:</i>		
10		What rating would your friends and family give you for your ability to relax and recharge? (1 Low, 10 High)
<i>The facts related to this are:</i>		

	<b><i>Recreational Category Total</i></b> (add all 10 ratings)
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	<b><i>Recreational Avg Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Social**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I am connected at a heart level to the inner circle of people who mean the most to me in my life.
<i>The facts related to this are:</i>		
2		I am comfortable in social settings.
<i>The facts related to this are:</i>		
3		I connect easily with new acquaintances.
<i>The facts related to this are:</i>		
4		I am satisfied with the depth and intimacy in my friendships.
<i>The facts related to this are:</i>		
5		It would be easy for me to come up with a list and the phone numbers of my three closest friends.
<i>The facts related to this are:</i>		



Stmt #	Rating	Statement
6		My three closest friends know how I feel about them.
<i>The facts related to this are:</i>		
7		I am neither completely dependent nor completely independent. I have a healthy interdependent relationship with the people in my life.
<i>The facts related to this are:</i>		
8		My choices and actions are motivated by who I authentically am rather than by who I think others want me to be.
<i>The facts related to this are:</i>		
9		I am able to set healthy boundaries; keeping people who I want in my life close to me, and keeping others at a comfortable distance.
<i>The facts related to this are:</i>		
10		I am the same person alone or around others.
<i>The facts related to this are:</i>		

	<b><i>Social Category Total</i></b> (add all 10 ratings)
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	<b><i>Social Avg Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Spiritual**

Rate each statement on a scale of 1 to 10. *1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.*

Stmt #	Rating	Statement
1		I can easily connect with my source of inspiration and guidance.
<i>The facts related to this are:</i>		
2		Aware of the power of my thinking, I harness that power to create a life that is inspired and inspiring.
<i>The facts related to this are:</i>		
3		I support and am supported by others who are on similar spiritual paths.
<i>The facts related to this are:</i>		
4		My mind is open and my experiences broaden my awareness.
<i>The facts related to this are:</i>		
5		I am satisfied with the balance of material and spiritual in my life.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I have a daily spiritual practice. <i>This could include prayer, intentional thought, affirmations, service work, meditation, reading, etc.</i>
<i>The facts related to this are:</i>		
7		I am on a path of spiritual growth with expanding awareness.
<i>The facts related to this are:</i>		
8		I recognize my core self as being authentically loving and giving and am compelled to love and give for the sake of loving and giving.
<i>The facts related to this are:</i>		
9		I see myself as a spiritual being.
<i>The facts related to this are:</i>		
10		I often enjoy getting present and being awed and fascinated by some aspect of nature such as the stars, an animal, the grass, a bug or a baby.
<i>The facts related to this are:</i>		

	<b><i>Spiritual Category Total</i></b> (add all 10 ratings)
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	<b><i>Spiritual Avg Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Significant Other**

(Use this category if you have a partner. If not, skip to the next category) Rate each statement on a scale of 1 to 10. 1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.

Stmt #	Rating	Statement
1		I believe that I made the right choice when choosing my partner.
<i>The facts related to this are:</i>		
2		I have what I want in my significant other.
<i>The facts related to this are:</i>		
3		My partner and I are a good match.
<i>The facts related to this are:</i>		
4		I feel equal with my significant other in my contributions to the well-being of the relationship.
<i>The facts related to this are:</i>		
5		I am enjoying our relationship.
<i>The facts related to this are:</i>		

Stmt #	Rating	Statement
6		I look forward to spending time with my partner.
<i>The facts related to this are:</i>		
7		I feel free to be who I am in the relationship.
<i>The facts related to this are:</i>		
8		I trust my significant other.
<i>The facts related to this are:</i>		
9		I am emotionally open with my partner.
<i>The facts related to this are:</i>		
10		I feel comfortable being completely honest with my significant other.
<i>The facts related to this are:</i>		

	<b><i>Significant Other Category Total</i></b> (add all 10 ratings)
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	<b><i>Significant Other Avg Rating</i></b> (Divide the total by 10)
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Date \_\_\_\_\_

Category: **Significant Other**

(Use this category if you don't have a partner. Otherwise complete the previous category) Rate each statement on a scale of 1 to 10. 1 means you strongly disagree, 10 means you strongly agree with the statement. Then describe the facts related to each statement.

Stmt #	Rating	Statement
1		I trust myself to choose a significant other who can help me to have the kind of relationship that I want.
<i>The facts related to this are:</i>		
2		I am clear about what I want in a relationship with a partner.
<i>The facts related to this are:</i>		
3		I am happy living without a significant other.
<i>The facts related to this are:</i>		
4		I have completely healed all of my wounds from past relationships.
<i>The facts related to this are:</i>		
5		I am in the process of becoming the kind of person that I would be attracted to.
<i>The facts related to this are:</i>		

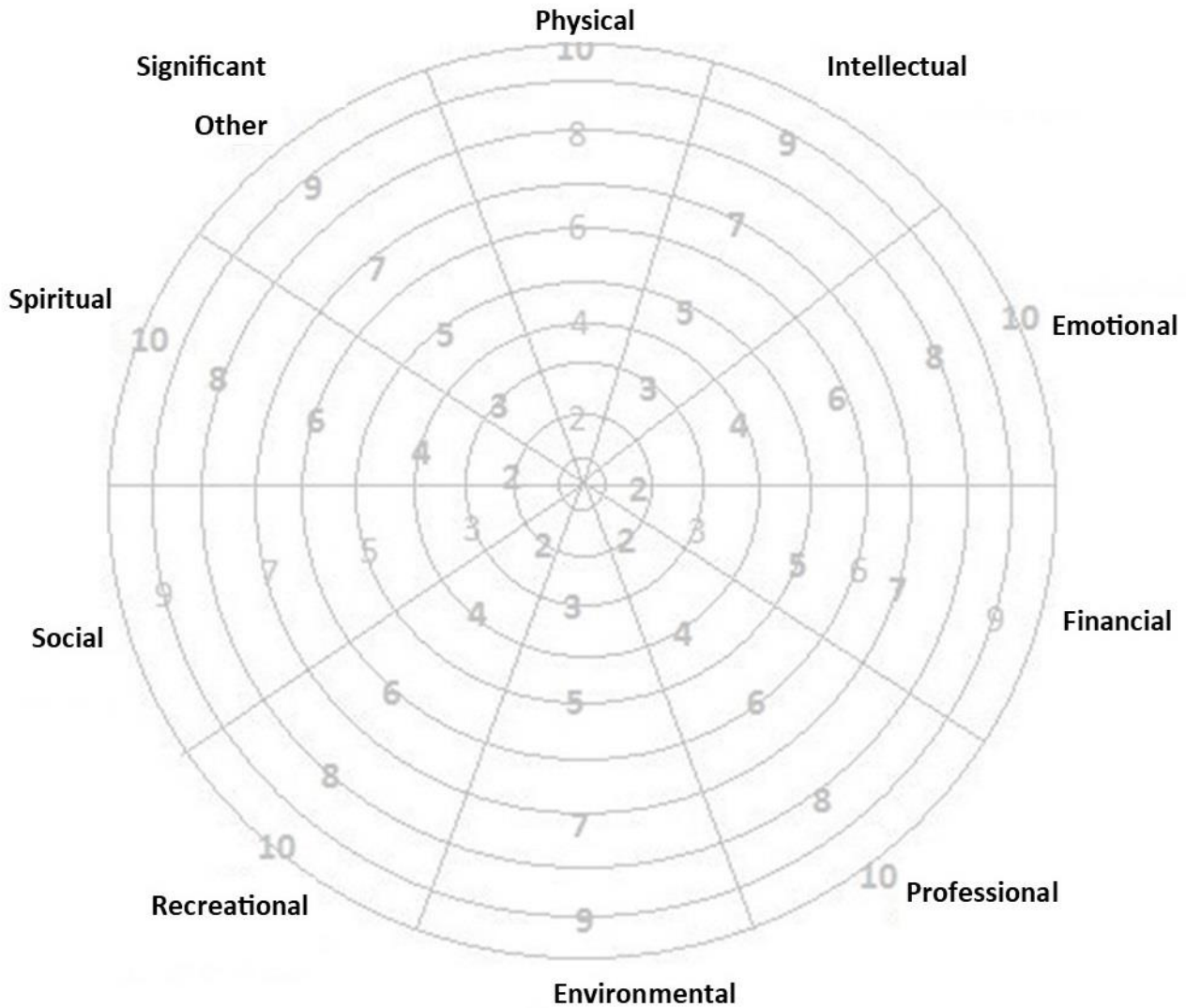
Stmt #	Rating	Statement
6		I feel patient and relaxed about the chances of attracting a significant other.
<i>The facts related to this are:</i>		
7		I am open to entering into a relationship with a potential life-long partner.
<i>The facts related to this are:</i>		
8		I have identified and taken responsibility for any part I played in the failure of previous relationships.
<i>The facts related to this are:</i>		
9		I consider myself a "good catch".
<i>The facts related to this are:</i>		
10		When meeting someone I am attracted to, I am comfortable being the same person that I am with my friends.
<i>The facts related to this are:</i>		

	<b><i>Significant Other Category Total</i></b> (add all 10 ratings)
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	<b><i>Significant Other Avg Rating</i></b> (Divide the total by 10)
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### The Life Wheel

Matching the numbers for each category, mark a dot in the appropriate sections using your overall rating from each category. Then connect the dots.



What are your thoughts and feelings now that you have evaluated these 10 categories of your life?



**Step 2. What would you like to change?**

Now that you have completed the Life Categories Self Evaluation, what are the first 10 things you would like to change, improve or transform in your life? Make a list of statements from the evaluation that represent 10 areas that you would change if you could. Then describe what would need to change to give yourself a 10 for each statement.

Example	Category	Statement #	Current Rating
	Physical	1	5
What would need to change to give myself a 10 for this statement? <i>I would need to lose 17 pounds.</i>			

1	Category	Statement #	Current Rating
What would need to change to give myself a 10 for this statement?			

2	Category	Statement #	Current Rating
What would need to change to give myself a 10 for this statement?			

3	Category	Statement #	Current Rating
What would need to change to give myself a 10 for this statement?			

4	Category	Statement #	Current Rating
What would need to change to give myself a 10 for this statement?			

<b>5</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		
<b>6</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		
<b>7</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		
<b>8</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		
<b>9</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		
<b>10</b>	<b>Category</b>	<b>Statement #</b>	<b>Current Rating</b>
	What would need to change to give myself a 10 for this statement?		

**Step 3. First Steps.**

For each change you want to make, what is the first thing you can do to move in the direction needed to bring about that change?

The first action I will take in each of these areas to bring about the change I want is \_\_\_\_\_.

By when will you take these initial actions?

<b>Example</b>	Preferred change:	
	Lose 17 pounds.	
	First Step or Action	By When
	Create a training schedule and start taking the actions I describe on the training schedule.	Tomorrow Morning, July 16
<b>1</b>	Preferred change:	
	First Step or Action	
	By When	
<b>2</b>	Preferred change:	
	First Step or Action	
	By When	
<b>3</b>	Preferred change:	
	First Step or Action	
	By When	

<b>4</b>	Preferred change:	
	First Step or Action	By When
<b>5</b>	Preferred change:	
	First Step or Action	By When
<b>6</b>	Preferred change:	
	First Step or Action	By When
<b>7</b>	Preferred change:	
	First Step or Action	By When

<b>8</b>	Preferred change:	
	First Step or Action	By When
<b>9</b>	Preferred change:	
	First Step or Action	By When
<b>10</b>	Preferred change:	
	First Step or Action	By When

**Part 4. The Benefits of Change**

Look again at your list of desired changes. Imagine your life, having made these changes.

What will shift? What will be possible that is not possible today? List as many benefits as you can for making each of these changes.

*Example: Preferred Change: Lose 17 pounds*

Benefits

- a. *I will feel better physically and have more energy and stamina.*
- b. *I will be able to fit into my old clothes instead of giving up and throwing them out.*
- c. *I will feel good about how I look and have more confidence.*

**1. Preferred Change:**

Benefits

a.

b.

c.

**2. Preferred Change:**

Benefits

a.

b.

c.

**3. Preferred Change:**

Benefits

a.

b.

c.

**4. Preferred Change:**

Benefits

a.

b.

c.

**5. Preferred Change:**

Benefits

a.

b.

c.

**6. Preferred Change:**

Benefits

a.

b.

c.

**7. Preferred Change:**

Benefits

a.

b.

c.

**8. Preferred Change:**

Benefits

a.

b.

c.

**9. Preferred Change:**

Benefits

a.

b.

c.

**10. Preferred Change:**

Benefits

a.

b.

c.



## Part 5. Accountability

You are about to embark on a journey outside your comfort zone. It may be very challenging to stick to form the new habits required to make these changes. To increase the odds of success, tell someone what you are up to and ask them to be your accountability partner.

Who is the first person who comes to mind? If they are too busy or if you can't rely on them to hold you to your word, who else could you ask?

Here are some suggestions to help you think of someone to ask.

- Your spouse or significant other
- Your best friend
- Your adult child
- Your parent
- A sibling
- Someone at church
- A client or customer
- An employer
- A coworker
- A fellow traveler

Make a list of the names and phone numbers of at least 3 people who you could enroll in the idea of being an accountability partner. By the way, this works best when the person you ask has something they would like to change as well.

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Once you find an accountability partner, give them a copy of the Life Categories Self Evaluation, and ask them to complete it. Then pick a date to establish the terms of your accountability partnership.

I recommend that you and your partner negotiate and agree to the following:

1. Determine the frequency of connection. Weekly? Bi-Weekly? Monthly?
2. Determine how you will connect. Email? Text? Phone? Video Conference? Face to face?
3. Put dates and times on the calendar
4. When connecting, report on previous commitments and make new commitments.
5. Commit to the partnership for a minimum of three months.
6. Be honest with each other. If you didn't do what you said you would do, say so.
7. If you break a commitment, make a new one.
8. If your partner becomes disinterested, agree to end the partnership, and find another accountability partner.



**Step 6. Next Steps**

After taking the first steps to achieve the change, improvement, or transformation that you identified in Step 2, keep the momentum going.

Review your list of preferred changes regularly and take action often to make the changes you desire.

Use the form below to keep track of any ideas you have for making these changes. Mark off the actions you have already taken. Review Step 4 often to remember why you want to make these changes.

<b>Example</b>	Preferred change:	
	Lose 17 pounds	
	<b>Actions and Ideas</b>	
	X	Research how to lose weight
		Cut down on sugar
		Start walking every day
	X	Find a yoga class and register for it
		Set some goals
	Make a weight tracking sheet	

<b>1</b>	Preferred change:	
	<b>Actions and Ideas</b>	

<b>2</b>	Preferred change:	
	<b>Actions and Ideas</b>	
<b>3</b>	Preferred change:	
	<b>Actions and Ideas</b>	
<b>4</b>	Preferred change:	
	<b>Actions and Ideas</b>	

<b>5</b>	Preferred change:
	<b>Actions and Ideas</b>

<b>6</b>	Preferred change:
	<b>Actions and Ideas</b>

<b>7</b>	Preferred change:
	<b>Actions and Ideas</b>

<b>8</b>	Preferred change:	
	<b>Actions and Ideas</b>	
<b>9</b>	Preferred change:	
	<b>Actions and Ideas</b>	
<b>10</b>	Preferred change:	
	<b>Actions and Ideas</b>	