

Coaching Goals and Abilities Worksheet

This questionnaire contains three sets of questions: profile, evaluation, and goals. The questions will help you to evaluate your lifestyle, identify areas needing improvement, and articulate fitting goals.

Set #1 - profile

1. PROFESSIONAL CONSIDERATIONS

- a. Am I in the job or profession for which my education prepared me? (Am I doing what I was trained to do?)

If not, why?

- b. What does it mean to me to have – or have not -- taken the path for which I prepared?
- c. What do I do well in my job?
- d. What specific parts of my job do I actually enjoy?

l. Am I happy with the state of my present physical health?

3. WHAT ABOUT MY SOCIAL LIFE?

a. How often do I see my friends?

b. Do my friends and acquaintances "lift me up," or do they "drag me down?"

c. How often do I have fun?

d. What do I enjoy doing beyond work?

e. What am I good at beyond work?

g. What makes me feel fulfilled?

h. What stressors are present in my life?

i. Who are the people in my support network?

j. How often do I interact with those in my support network?

k. What do I do for myself only?

l. What do I value most in life?

m. What do I do to honor those values?

5. FINANCIAL CONSIDERATIONS

a. How financially secure do I feel?

b. How often do I worry about money?

c. Have I saved enough for emergencies?

d. Do I have long-term investments?

e. Do I have adequate health/home/life insurance?

f. Am I living within my means?

g. How do I generally regard the concept of debt?

h. What do I consider important enough to incur debt for?

i. How manageable is my current debt?

6. HOME LIFE

- a. What quality time am I spending with my spouse or partner?
- b. Is that time sufficient?
- c. What quality time am I spending with my children?
- d. Is it enough?
- e. How involved am I in my children's/ spouse's/ partner's activities?
- f. How important are my individual needs to my family?
- g. How am I handling my share of upkeep responsibilities?
- h. How active am I in my community?
- i. How do I feel about the area where I live?
- j. How does my home reflect who I am?

Set #2 - evaluation

Read over the responses you gave to the questions in Set #1. Take enough time to think about what you wrote. What profile of you emerges? With that picture in mind, it's time to answer a few more questions:

1. IN WHICH AREAS OF MY LIFE DO I APPEAR MOST IN CONTROL?

2. IN WHICH AREAS DO I APPEAR MOST SATISFIED OR CONTENT?

3. IN WHICH AREAS DO I APPEAR TO BE STRUGGLING?

4. ARE THERE ANY AREAS WHERE I APPEAR UNFULFILLED?

Set #3 - goals

Having evaluated and reflected on aspects of your lifestyle, the final step in this preliminary self-assessment process will be to identify goals. Select the goals based on desired changes that will help you achieve balance and align your actions with your values.

1. WHAT ARE SOME KEY AREAS IN MY LIFE THAT I WANT TO IMPROVE?

(Health? Finances? Professional Development? Home Life? Social Life?
Spiritual Life?)

2. WHAT ARE SEVERAL OF MY SHORT-TERM GOALS?

a. Where do I want to be in 1 month?

In 3 months?

In 6 months?

b. What do I have to do daily to get there?

c. What things do I want to work on now?

3. WHAT ARE MY LONG-TERM GOALS?

4. HOW DO MY GOALS REFLECT WHAT I SAY I VALUE MOST?

(Before answering, refer back to section on Spiritual Life/ Sense of Well-Being.)

**5. WHAT WILL I HAVE TO DO -- WHAT CHANGES WILL I HAVE TO MAKE --
IN ORDER TO LIVE ACCORDING TO MY VALUES?**