



TAKING INVENTORY

Personal • Professional • Purpose

PERSONAL INVENTORY

Let's take your personal inventory.

Answer the following questions on a scale of 1–10 with 10 being the highest score you can give yourself. The questions are broken into four clusters of three questions each that allow a self-appraisal in the following areas: **social, health, motivation, and general state of mind.**

- 1. How happy are you with your life today? _____ (G)
- 2. Do you have at least five close personal friends? _____ (S)
- 3. How would you rate your overall current health? _____ (H)
- 4. Do you have specific goals for the next three and five years? _____ (M)
- 5. Is your energy level great? _____ (H)
- 6. Are you confident are you in your ability to create change? _____ (M)
- 7. Do you seek out social situations rather than being alone? _____ (S)
- 8. Do you have a very clear health and wellness program in place? _____ (H)
- 9. Is your support system is fantastic? _____ (S)
- 10. Do you generally wake up excited about the day ahead? _____ (M)
- 11. Do you generally feel at ease and content? _____ (G)
- 12. Do you feel happy and excited about your future prospects? _____ (G)

Total up your current Personal Inventory Score: _____

Now that you've totaled your score, let's dig deeper to understand some trends and better diagnose where you need to focus your efforts.

TAKING INVENTORY • Personal *continued*

PERSONAL INVENTORY

You could have scored a maximum of 120 on this survey. I scored 35 out of 120 when I did this. That was a jarring 30 percent of the highest possible score. When I dug deeper, I realized that I scored 15 out of 30 in the social category. I *scored 20 out of 84 when I eliminated social* and studied the three other categories, which put me at less than 25 percent of the max and clearly told me that I was broken.

So, let's look at how you scored yourself across all the categories so we can focus on which areas of your personal life need to be prioritized.

Total your score by category:

CATEGORY	QUESTION #	CUMULATIVE SCORE
Social	2, 7, & 9	
Health	3, 5, & 8	
Motivation	4, 6, & 10	
General	1, 11, & 12	

TAKING INVENTORY • Professional

PROFESSIONAL INVENTORY

If you are thriving in your career, highly engaged, and certain about what you want to do for the next twenty years, then you are lucky and rare. If this is the case, you can move on to the next section. But for most people in the middle of their life, our jobs are how we spend the bulk of our time, and research tells us that most of us have work to do to figure out how to maximize our professional pathway. So, let's look at how you scored yourself across all the categories so we can focus on which areas of your personal life need to be prioritized.

Let's take your **professional inventory**.

On a scale of 1–10 with 10 high:

- 1 How happy are you with your current role and company? _____
- 2 Do you receive quality support and coaching from your supervisor? _____
- 3 Do you spend most of your time working on the things you do best? _____
- 4 Do you spend most of your time on things you love to do the most? _____
- 5 Are there significant opportunities to learn in your current role? _____
- 6 Are you compensated in a manner that you feel good about? _____
- 7 Are you happy with your overall career today? _____
- 8 Do you feel certain you are on the right career path for the future? _____
- 9 Do you rarely think about switching jobs or careers? _____
- 10 Do you have many alternate paths available to you? _____
- 11 Do you have great ability to take on new career risk? _____
- 12 Do you derive great joy from what you do for a living? _____

Total up your current Professional Inventory Score: _____

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PROFESSIONAL INVENTORY

You could have scored a maximum of 120 in this section. The first six questions are a self-appraisal of your current job, and the next six questions are a self-appraisal of where you are relative to your career ambition.

Evaluate your score in the two specific categories that define your professional inventory:

CATEGORY	QUESTION #	CUMULATIVE SCORE
Job	1-6	
Career	7-12	

I had a very difficult time answering some questions on my first attempt and scored under 20 percent of the maximum total. So much of my self-worth and status was tied to my professional achievements, and this was clearly having an impact on my health and well-being.

For each of these two categories, you should score somewhere north of 50 out of 60, or better than 85 percent, to continue what you're doing and not focus on pivoting.

TAKING INVENTORY • Purpose

PURPOSE INVENTORY

Let's take your purpose inventory.

We have a writing exercise that is going to prove to be incredibly important. Take some time to respond to the following questions/statements in two simple sentences for each item. This is a brainstorming exercise, and there are no right or wrong answers. I find that the first things that pop into your head are often closest to the right answers for you.

This exercise should help you anchor what makes you most excited, motivated, and driven to live. There is no formula; we are all unique, and we all have an individualized sense of what motivates and excites us.

1. I am passionate about these things:

2. If I could do anything with my daily time, what would I do?

3. What "special powers" do I have that make me unique?

TAKING INVENTORY • Purpose *continued*

PURPOSE INVENTORY

4. I get really excited when I think about this:

5. What two things would I like to contribute to society?

6. I would love to help people in the following ways:

7. My passion often has me thinking about this:

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PURPOSE INVENTORY

8. If I had to describe myself in two words, what would they be?

9. I simply feel great when I spend time doing this:

10. I would feel most fulfilled if I can help people in this way:
