



# Excel90

90-days to greater focus, energy, and results!

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Life Success Assessment



# LIFE SUCCESS ASSESSMENT

## WHAT IS SUCCESS?

Success means different things to different people at different stages in their lives. It's tempting to adopt society's depiction of success, with its obsession for material possessions and impossible standards. However, you should have your own definition of success — for each facet of your life.

## THE FOCUS ON PROFESSIONAL SUCCESS

As executive coaches and development professionals, we have worked with thousands of people around the globe to help enhance their success. Over the years, we began to see a disturbing trend emerge: most people tend to focus on just professional development. Their goals center on enhancing performance in the workplace with little attention to the other key areas of life.

We found that this lack of attention to other areas of life was the main contributing factor to unhealthy lifestyles, leading to undesirable outcomes like:

- Chronic health issues
- Low energy
- A sense of hopelessness
- Broken relationships
- Anxiety & stress
- A lack of focus

Seeing this story play out repeatedly set us on a journey to find a better way. We wanted to find a solution to allow people to advance at work but still take care of those other facets of life.

## THE LIFE IN BALANCE™ MODEL

The Life in Balance™ model is the result of that endeavor. Leveraging concepts from psychology, neurology, human performance, happiness, and habit formation, the system is a holistic approach that enables you to realize change in all areas of your life. It's about setting targets and developing the routines necessary to not only achieve your goals but also to create sustainable patterns.

Begin your journey toward greater balance, energy, and fulfillment by assessing your life against the six Life Success Facets and by defining what success looks like for you in each one. You can then create a plan to realize greater fulfillment in the critical facets of your life.

## LET'S GET STARTED!



# LIFE SUCCESS ASSESSMENT The six facets

Indicate the extent to which each of the following applies to your life. Use the following scale to indicate your current level of satisfaction with each Life Success Facet based on the last 30 to 60 days. Your objective ratings will provide you with insights for setting development goals.



## PURPOSE



**Values.** I have a core set of guiding beliefs and values that reflect what is most important to me. My personal values influence my daily decisions and actions and give me overall direction in life. Others would agree that I act in accordance with my values.

**Talents.** I understand and appreciate my unique talents and attributes. I value the traits that give me my individuality. I understand how I am viewed by those around me and the characteristics that define me and make me different.

**Contribution.** I do what I love and am good at doing, the results of which provide value to others. I am doing what I was born to do which brings me joy and allows me to utilize my talents. I'm living my authentic self- the real me.

SUB-TOTAL



## GROWTH

**Growth Mindset.** I have a desire to learn and believe that growth is a lifelong journey. I challenge myself to develop my abilities and implement the habits I need to reach my full potential. I view challenges as an opportunity to improve myself. I learn from my mistakes.

**Open to Feedback.** I am open to feedback from others. I take constructive feedback seriously and look for ways to address issues and improve.

**Learning Focus.** I proactively seek opportunities to develop my skills, sometimes in new ways. I utilize different learning strategies to grow.

SUB-TOTAL



## WELL-BEING

**Mental Health.** I focus on what's important and am able to handle the stresses of everyday life. I maintain a positive outlook, keeping my problems in perspective. I employ techniques that enhance my peace of mind (e.g. creating routines, planning ahead, yoga, meditation).

**Physical Health.** I am physically fit, as evidenced by my strength, flexibility, and endurance. I eat a healthy diet and stay hydrated. I don't abuse drugs or alcohol. I get adequate sleep.

**Spirituality.** I feel unity with a greater force in the universe (e.g. a supreme being, nature, music, literature). I seek meaning in my life, reflecting on experiences that bring me joy, fulfillment, or greater clarity about what's important.

SUB-TOTAL





## CONNECTION



**Partner.** I feel a deep, strong connection with my spouse or partner. I invest in building a stronger, more intimate relationship. I understand and strive to meet his/her needs and feel my needs are met in return.

**Friends & Family.** I have one or more close friends with whom I have a strong connection. We accept and support each other. I have a loving relationship with my family. I spend quality time with them and seek ways to support them. We accept each other for who we are.

**Community.** I have a strong connection and sense of belonging to an entity bigger than myself (e.g., organization, culture, church, social network). My contributions to my community allow me to give back while providing a sense of fulfillment.

SUB-TOTAL



## WORK

**Contribution.** My work allows me to contribute to something bigger than myself (e.g. my company, my family). My efforts provide value to others.

**Satisfaction.** My work is energizing, fulfilling and personally meaningful. I have the opportunity to build a career that will help me reach my goals.

**Reward.** My efforts are rewarded in accordance with my level of contribution. I feel adequately compensated to provide for the current and future needs of myself and my family.

SUB-TOTAL



## LEISURE

**Hobbies.** I have at least one hobby that I love and that inspires me while stretching my skills. I make time to pursue my hobbies. I share my passions with others and am energized by those who share the same interests.

**Fun.** I make it a priority to have fun. I engage in enjoyable activities in my free time and seek new experiences for my personal development.

**Relaxation.** I build downtime into my routine to ensure I can rest and recharge. I make time to unwind, reduce stress, and improve my mood. I engage in activities that bring about a state of inner calmness and a more positive outlook.

SUB-TOTAL

Tally your score from each Life Success Facet and enter it in the table below.



PURPOSE	GROWTH	WELL-BEING	CONNECTION	WORK	LEISURE





# LIFE SUCCESS ASSESSMENT **Scoring**

## INTERPRETATION

A score of **13 or more** is a facet in which you are currently very satisfied. A score between **9 to 13** suggests you have an opportunity for greater satisfaction. A score **less than 9** indicates that the facet should likely be a priority.

## GETTING FOCUSED

Based on your self-assessment, identify one Life Success Facet that you would like to focus on improving. This may not necessarily be the facet in which you scored the lowest. However, it should be an area of your life that you feel is important to enhance at this time. Commit to focusing on that facet for the next 10 days.

Make a note of the facet you want to focus on in the space below. Also write down why this facet is important to you right now.

FACET IN FOCUS	WHY IT MATTERS?
<i>The facet most in need of focus at this time is:</i> <div></div>	<i>Why does improving in this facet matter?</i> <div></div>

## ONE ACTION

Every journey begins with a single step. That first step might be easy, or it might be the most difficult one you'll take. Once you have identified your 'Facet in Focus' and why it matters, identify one action you will take every day for TEN DAYS to begin your journey.

Be realistic by identifying a simple action that you can complete daily. Remember, the goal is momentum, which leads to progress. Progress over time leads to massive results!

## ONE ACTION

Write down ONE ACTION you will take each day!

*Track your progress using the habit streak below.*

**Habit Streak**



“Success is the sum of small  
actions repeated day in  
and day out.”

*–Robert Collier*

Given the progress you achieved in 10 days, think of what you could achieve if you had the tools and resources to help you.

The Excel Planner is a 90-day planner designed for high performing, achievement-oriented people looking to take their success to new levels. It's specifically designed to help you focus on what matters most so that you can achieve greater success. Purchase via Amazon or contact us for bulk orders at **[support@excelleadershipgroup.com](mailto:support@excelleadershipgroup.com)**.

The Excel Planner™

*Excel at Work & Life!*

