

Tools you can use...

Whole Life Priority Self-Assessment

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Introduction

This tool is based on the 'radar screen' model I introduced in my recent [LinkedIn newsletter article](#) (October 5th, 2022.) This simple model takes a different path to setting priorities than many of today's popular personal productivity models. Its focus is on optimizing what I call 'Whole Life Performance.'

As I've written in several articles, I believe that we live our best, most impactful, lives when we continually adjust our priorities and actions across all of life's 'callings.' This isn't about work/life balance. That term is increasingly being challenged as simplistic and misguided, mainly because it implies that there are only two domains in which to set priorities: work and the rest of life. There are multiple domains that require our attention, not just two. The bottom line... ***we need to conduct regular scans of what's happening – and might happen – across the whole of life.***

How This Assessment Works

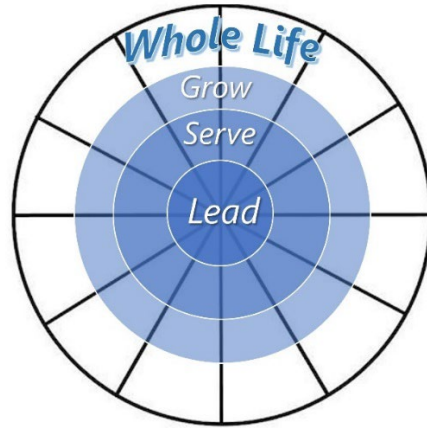
This assessment is a guided reflection that serves as a 'whole life radar scan.' It is designed to help you capture your current reality, anticipate future challenges, and reveal the priorities you most need to act on in the short-term. Doing this for the first time will take longer than subsequent scans. That's partly because you'll be learning the process, but also because you've probably not conducted this type of scan previously. Be assured... your time investment will pay big dividends.

The Process

You'll need multiple pages (digital or hard copy) for this process as you scan your life from different vantage points. You'll start with a broad scan of your life settings, then identify Roles, Relationships and Responsibilities, and then focus on the Lead, Serve, and Grow priorities on which you need to act.

When you're ready to complete the assessment, check out the next page!

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How to Conduct a Whole Life Priority Scan:

- 1. Life Settings:** Most of us engage with the world in different settings. Home, Work, Education, and Community are the most common personal settings. We each define these differently, but that's not important... this is just an aid to doing a thorough scan. Divide a page into however many settings make sense to you and label them.
- 2. Roles & Relationships:** In each of those settings, list the most important Roles you fill and/or Relationships you must develop, maintain, or improve (individuals or groups.) Some may overlap... that's OK for now. Be sure to include your relationship with yourself in this list.
- 3. Responsibilities:** On a second sheet of paper (more, if necessary), work through your lists or Roles and Relationships section by section. For each Role or Relationship, list the most important responsibilities you take on (or should.) Where there are overlaps between Roles and Relationships, focus on the Relationships. Some key responsibilities to include are unfulfilled promises you have made, and important projects that are incomplete or not yet started.
- 4. Lead, Serve & Grow Priorities:** Finally, review your lists and circle the responsibilities where you can identify specific current 'Lead' level action priorities to work on... mark those with an 'L', and briefly summarize the identified priorities. Do the same to identify specific current 'Serve' level action priorities... mark those with an 'S' and summarize the identified priorities. Include yourself in this list by identifying and summarizing action priorities that Serve your needs. Then, review your list of identified Lead and Serve priorities, and think about related 'Grow' level priorities required to increase your ability to take effective action.
- 5. Prepare for Action:** Set your scan information aside for a day. Reflect on what you've learned through this exercise. Then, select up to three Lead level priorities to focus on right away. Define a desired end result for each... how you will know you've succeeded. Do the same for 3-5 Serve level priorities, including one for yourself, and 2-3 Grow level priorities.
- 6. Take Action & Track your Progress Toward your Desired End Results!**