
personal balance assessment

Identify where you need to focus and take immediate action

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In brief

This is a simple process to initiate action in your life. Carefully read the “things to consider” on the next page, then use the clear template on the following page to rate your satisfaction in each of the areas listed.

- In the NOW column, rate your current status from 1 to 10, where 0 is poor and 10 is excellent. Do not dwell on this. Your first intuitive number is most likely correct
- In the GOAL column, put the number that represents where you would like to be in this area
- In the RANK column, deduct the NOW number from the GOAL number. Area(s) with the highest scores indicate where you want, and need, to focus. Do not address everything. Choose no more than three high scoring areas.

Of these, look at your NOW score in each. Some could be low. Say, a 4. In the POSITIVE column, note down the things that get you to a 4. They indicate that even in your most difficult area, you are doing some things right. What are they? These are the strengths that you bring to any situation. Maybe you just turn up. In that case, note your reliability. You can be depended on to be there.

Next, imagine what your GOAL number would look like. Think of waking up in the morning and you are there. What would your life look like? Who would be there? What’s happening around you? Don’t just visualise the scenario, feel it. Everything is ticking over perfectly. You have achieved it.

Now, choose the very simplest first step you can take toward that place. It must be achievable and realistic. Just one step. Opt for the one that could be initiated soonest. It may be as easy as a phone call, or arranging a meeting. If it is listing the steps you have to take to get there, then break the list down into such easy steps that you can take the first one now. The goal can be anything from a major business project through taking your wife out to dinner to playing golf every second Thursday. The important thing is to choose the first simple step and action it now.

Having done that, identify the next step. Then take it. If you can’t do it right now, diarise the time that you are going to do it. When that time comes, do nothing else until that step is taken.

For long term success, repeat.



Personal Balance Assessment - identify where you need to focus and take immediate action

AREAS	THINGS TO CONSIDER
Health & Fitness	Few people score 10 in this area. Many healthy people desire improvements in their fitness or changes in their lifestyle. They may not want to stop smoking, drink less, run more, lose weight, put on weight, recover from injury or illness or address emotional and mental issues that are holding them back.
Career & Business	Is your career progressing well? Is it taking you where you want to go? Do you want to get there faster? Are you in the right business? Do you want to be in business at all? Do you lack skills that would improve your score? Do you feel disorganized or unmotivated? Do you like your work environment? Do you want a fundamental change in this area? Are you planning a change in employer or industry?
Financial Security	Tough one this. Legend has it that when asked "Ho much is enough", John D Rockefeller answered "A little bit more" Very few people accept their financial condition, be it excellent or poor. Exactly what yardstick do you want to put in place? And where do you stand now relative to that yardstick? What is required to get you to your goal? Is it realistic? Would you just like to stop worrying about it and get on with your life? Do you have specific financial difficulties that you need to address? What is going on right, financially? What financial things do you do well?
Personal Growth	Are you developing as a person? Do you need to? Are you fine the way you are? Really? Personal growth can mean many things to different people. Do you feel under qualified? Is there anything you can do about it? Do you have personal issues that you need to resolve? Do you want to develop spiritually? How's your mental health? Your anger? Do you want to be calmer, or more active?
Intimate Relationships	This can include any relationship that matters to you. Your wife/husband, children, extended family, friends, your boss, work colleagues, neighbours - just about anyone. How do you rate your relationships? Are any not working?
Community	How do you interact with your community - help at school, church, sport, charity, club or pub. Do you avoid your community? Does lack of involvement limit your choices or curb your opportunities? Do you like it that way? Why?
Recreation & Leisure	The areas covered in this worksheet are not exhaustive, but they encompass most of the aspects of our lives. They are like spokes in a wheel. Some strength or focus on each one is required to keep the wheel balanced. There will be times when one area is more important than others, but none can be ignored entirely. This process aims to focus your attention on areas where action now would bring greatest benefit and which some effort is required to restore balance. Remember that recreation and leisure, no matter how defined, can play a crucial role in maintaining a balanced life.



Personal Balance Assessment

Focus then act

AREAS	NOW	GOAL	RANK	POSITIVES	ACTION
<i>Change to suit personal profile</i>	<i>(A) 1-10</i>	<i>(B) 1-10</i>	<i>(B-A)</i>	<i>List your strengths in this area</i>	<i>What could help achieve your goal?</i>
Health & Fitness					
Career & Business					
Financial Security					
Personal Growth					
Intimate Relationships					
Community					
Recreation & Leisure					



For more information, visit my website www.alanhargreaves.com

Hi, I'm Alan Hargreaves. I specialise in simplifying complex business problems. In over 35 years as a business executive, I have never found an issue that cannot be addressed through identifying the essential but simple steps required to make any problem manageable. It might be your career, your firm, your team or your strategy. It doesn't matter. All hurdles can be lowered through dispassionate analysis, and all executives can embrace simple processes to take them forward. Using these techniques, I have helped hundreds of people through the various stages of their business or career development. It may be the challenge of taking on new responsibilities; it could be the task of managing a business you have created yourself; it may be handling a difficult team in the midst of major change. I use a straightforward combination of key principles to get results: collaboration, adaptation, simplification and action. You can contact me anytime at alan@alanhargreaves.com.



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