



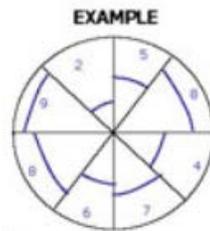
THE BALANCE WHEEL EXERCISE

The purpose of the Balance Wheel Exercise is to assist you with prioritizing your work/life in order to ensure greater balance and increased overall satisfaction.

This quick and powerful tool will give you a visual representation of the way your life currently is, compared with the way you would ideally like it to be. And based on that create actions steps that you can take to move towards your goals, clarify priorities and assess your progress.

Process

1. Think of a number of categories of your work/life in which you are currently engaged. Examples are finances, relationship, family, health, leisure, career, personal development, etc. Aim for eight categories.
2. Use the Wheel template on page 3 and write each of your categories along the outside edge of each section. Each section should represent one category.
3. Rate each of the categories in terms of your current satisfaction on a scale of 1 (No satisfied at all) to 10 (Extremely satisfied). If you print out this document, you can shade in/color that amount in the appropriate section. It will look something like this:



Otherwise you can just write the rating next to each category. For example: Health (7).

4. Now look at the wheel overall, what do you notice? Record your thoughts in the below box:

5. If you were to be more satisfied with one category, that would positively impact the other categories, which category would that be? Highlight or put a star in that section (more than one category can be chosen.)



6. For the chosen category or categories, consider three or more action steps that would raise your satisfaction with your chosen category or categories. Make sure to be as specific as possible with those action steps – this means put a deadline on it and calendar it. That will also help you stay accountable to it. For example: In relation to “Health” an action step could be “Do exercise 2 x week (Tuesdays & Thursdays) starting today”.

You can use the below boxes to fill in your action steps.

My chosen category is: _____

My action steps for that category are:

My chosen category is: _____

My action steps for that category are:

My chosen category is: _____

My action steps for that category are:

7. Take action on your steps!
8. After 3 months – or so (whatever feels good for you), revisit your wheel again by rating one more time each category. This will help you track your progress, see your improvement and check if you need to re-prioritize, or add new actions steps to keep moving towards where you want to be.



THE BALANCE WHEEL WORKSHEET

