

5 Question Assessment

Life is what happens to you while you're busy making other plans – John Lennon

Most people don't take the time to stop and evaluate the direction of their life. As a result, they work harder than they need to for things they don't really care about, leaving them unfulfilled and burned out.

Take 15-30 minutes, answer the following five questions, putting your thoughts down in black and white – not just thinking about your answers. Boldly state the goals you're committed to achieve and the impact you'd like to have. This is just the start...

Recognize What Brings You Happiness

What are the 7 best moments of your life (your proudest, happiest memories and experiences)?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Describe Your Ideal Life

(It may be best to do this on a separate piece of paper so you have plenty of room to write.)

What are your hobbies? What do your relationships look like? How often are you able to exercise? What is the state of your physical health? Where and how often do you travel or take vacation? How much money do you need to live well and never make money the reason you do or do not do something again?

Describe Your Dream Practice

Imagine that it is one year in the future and your practice is in the best position possible, what does your practice look like? How does it support your ideal life?

What Matters Most?

What are the three most important areas of your life (family, business development, religion/spiritual practices, physical health)?

Looking at your calendar, reserve time weekly for the three most important areas of your life.

Examples:

Weekly date night with spouse on Saturday from 6:00 – 9:00 pm

Weekly family game night on Monday from 7:00 – 8:00 pm

Review practice KPIs each Friday at 1:00 pm

Change Happens Now

Looking at the state of your practice and life now, what is one thing you will change to step closer to your dream practice and ideal life?

Examples:

Stop working Saturdays

Save \$2500 each month

Leave the office by 5:30 pm daily

Block out three weeks of vacation

Stop taking two lowest insurance plans

Looking at your answer above, put a date on the calendar of when it will happen.

Examples:

Stop working Saturdays, beginning July 4

Save \$2500 each month, beginning September 2020

Leave the office by 5:30 pm every day starting Monday

Block out three weeks of vacation – put it on the calendar next week. Take the vacation by March 2021

Stop taking two lowest reimbursing insurance plans by October 2020