

A top-down, black and white photograph of a person sitting at a desk. The person's head is in the lower-left corner, and their hands are visible. One hand is holding a pen and writing in an open notebook. The other hand is resting on the desk. On the desk, there is a laptop, a pair of glasses, and a cup of coffee. The background is a light-colored wooden surface.

work-life audit

the starting point
for living
your best life

created by **Kate Dixon**
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So, in short, don't copy, and have fun!

A handwritten signature in cursive script that reads "Kate".

getting ready

My leadership coaching clients come to me ready to make **big changes** in their lives, but they're often at a loss as to how to start. I developed the *Work-Life Audit* toolkit to help them get started living their best lives, purposefully and intentionally.

What will this practice do for you? Let's get started!

why should you audit your work & life now?

- ✓ **You deserve clarity.**
When you don't know where you're going, you can't get there. By taking the time to stop and look at what's going on in your life, you're giving yourself the gift of clarity. Getting clear about what's important to you AND how happy you are with it is key. Brilliant!
- ✓ **Focus is essential to getting the results you crave.**
Taking the time to figure out the things that are most important to you and which ones need attention will help you create focus. Which in turn sparks your intention, which then drives results.
- ✓ **Your results are unique to you, at this moment.**
What's important to us and how happy we are with it tends to shift over time. Especially when you're making big changes and rocking your world! Completing a *Work-Life Audit* at least once a year will help you take stock. You might be surprised at your results!

how do you audit your work & life?

- ✓ **Be honest.**
This audit is for you, not anyone else. Don't think about what you should answer or what someone else would want you to answer. Speak the truth *to yourself, for yourself.*
- ✓ **Take time.**
Sure, you could move through the *Work-Life Audit* at top speed, but how would that serve you? Take some time to think about it. If you find yourself stuck, put it aside for a few hours and come back to it.
- ✓ **Dig deep.**
Deciding what you really want, and how you really feel about it is a super-big deal. Really connect with your true self, and figure it out. Down deep.

Are you ready? Flip the page, and GO!

your work-life audit



Instructions: For each category, select how important the category is, and how fulfilled you currently are in that category. Feel free to add categories at the bottom. Then, enter a score for each category. Interpret your scores using the information on the following page.

category	how important is it to you?			how fulfilled are you with it?			score (ex: hi-hi, med-lo)
	low	medium	high	low	medium	high	
Work							
<i>Job</i> The work you do on a daily basis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Development</i> How you're growing and learning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Organization</i> The company/organization you work for.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Pay/Benefits</i> The rewards you receive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Your Team</i> The people who work for & with you.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Your Leadership</i> The people who manage and lead you.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>You as Leader*</i> Your skills & abilities as a leader.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Life							
<i>Health</i> Your diet, exercise, and overall health.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Partner</i> Your spouse or significant other.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Family</i> Your nuclear and extended family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Home/Environment</i> Where you live and play.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Community</i> Your neighborhood and causes you support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<i>Money</i> Your finances, savings, and debts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Self-Defined Categories							
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

* Complete if you are a people manager

what does it mean?



scoring your work-life audit

What does your score mean? Review how you scored each category on the previous page, and check out the explanations below:

Score	Explanation	Score	Explanation	Score	Explanation
Hi-Hi	Congratulations! Your importance and fulfillment match. No action needed.	Med-Hi	Good news! Your fulfillment is higher than its importance. Nothing needed here.	Lo-Hi	You might want to consider shifting energy to lifting fulfillment elsewhere.
Hi-Med	Hmm. Your fulfillment is lower than importance here. Explore increasing your fulfillment.	Med-Med	Congratulations! Your importance and fulfillment match. Action not required.	Lo-Med	Good news! Your fulfillment is higher than its importance. Nothing needed here.
Hi-Lo	Big mismatch! You'll definitely want to spend some energy increasing your fulfillment.	Med-Lo	Hmm. Your fulfillment is lower than importance here. Explore increasing your fulfillment.	Lo-Lo	Congratulations! Your importance and fulfillment match. Action not required.

interpreting your results



How do you feel?

Completing your *Work-Life Audit* can be an emotional experience. My clients have experienced relief, anger, excitement, frustration, and everything in between. What's coming up for you? And why?



Where do you have mismatches?

If you have scored things **Hi-Lo**, **Hi-Med**, or **Med-Lo**, you have a *negative mismatch* between how important the category is for you and how fulfilled you are with it. Items you've scored this way will be your first place to look for things to focus on and/or change. Your mismatched categories are likely to give you the biggest fulfillment boost when you make progress with them. Add any mismatches to the worksheet on the *Next Steps Worksheet*.



What's freaking you out?

If you're like most people, there's one thing in your Work-Life Audit results that's bothering you. Or maybe even freaking you the heck out. Zoom in on that one thing, and pay attention to that energy. That's *you* telling *yourself* that this one thing is a great place to start planning what's next! And put it on the *Next Steps Worksheet*.

what's next?

So . . . you've completed your *Work-Life Audit*. What's the best way to get started closing the gaps you identified? Take these 3 steps:

your 3 steps

1 ***Tune in.***
If you're overwhelmed with things you'd like to work on, take a moment, and listen to your heart. You already know what you need more of. Or less of!

2 ***Decide how far you're willing to go.***
For example, if you find that your team is really important to you, but you're not fulfilled with it, what are you willing to do to change things?
Shift your perspective and attitude? Focus your energy and develop your interests outside of work? Find a new job or place to work?
It's time to get real.

3 ***Make a plan.***
Just pick one thing to get started with. What does success look like?
Now, think about the steps you need to complete to get your thing done, and write them down (by hand is best!). Writing will help cement what your intentions are, and once you commit your plan to paper, it'll be easier to track. Start with the *Next Steps Worksheet* (on the next page)!
Don't forget to plan for celebrations along the way — reinforce your wins!

Now start your plan with the *Next Steps Worksheet*!

your experience

Email me (kate@katedixon.org) and tell me how it's going! I'd love to hear how the *Work-Life Audit* is changing your life.

Want more information or help with goal-setting, integrating your work and life, becoming a better leader, bumping up your performance, and/or living your best life? Visit my website (katedixon.org) and/or drop me a note (kate@katedixon.org).

I'd love to help you create more of what you want in your life!

next steps worksheet



Now that you've figured out what the results of your *Work-Life Audit* mean, it's time to take action!

focus areas

Enter any area that's coming up as a focus for you; either category mismatches, or stuff that freaked you out, or is something you really want to get after.

	DESCRIPTION	WHY FOCUS HERE?
FOCUS AREA 1		
FOCUS AREA 2		
FOCUS AREA 3		

my one thing

Let's get started. Fill out the table below with the *one thing* you'll focus on first, how you *define success* for that thing, and what is *your plan* to get there.

MY ONE THING	WHAT IS SUCCESS?	HOW WILL I GET THERE?

thanks for completing the **work-life audit!**
for more information, visit katedixon.org

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