

- DEAR HANDMADE LIFE -

# The Club

## Big Picture Assessment Worksheet Section 1: Your Business



### What to do:

This worksheet is designed to help you assess where you are in your business & life and begin thinking about where you want to be. Fill out this worksheet once a year or whenever you're ready for a big assessment and use it to create your list of goals and intentions. Section 1 focuses on your business and section 2 focuses on your personal life.

### Before you get started...

Go someplace quiet where you won't be interrupted. Then, I suggest taking a few deep breaths. I like using 4-7-8 breathing: breathe in through your nose for a count of four, hold for a count of seven and then forcefully breathe out out your mouth for a count of 8. You can see it [here](#) if you need a little help.



**Do you feel calm and present?  
OK, now let's fill out this worksheet!**



# Part 1: The Bright Side



***"In order to have the new experience you're seeking, you need to focus first on your present experience."***

***-J. Ortner***

What three accomplishments in your business are you most proud of from this past year?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

How did you celebrate these and your other accomplishments?

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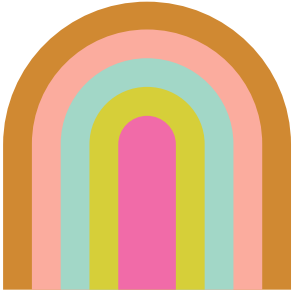
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What in your business makes you feel the most alive right now?

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# Part 2: Letting Go



*“If you’re not making some notable mistakes along the way, you’re certainly not taking enough business and career chances.”*

*-Sallie Krawcheck*

Is there anything in your business that isn’t producing results that you want to let go of?

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What are your regrets, disappointments or “mistakes” in your business from this past year (or beyond)?

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What did you learn from them? How will you use what you learned to do things differently moving forward?

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What do you want less of in your business this year? What steps can you take to get less of this?

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# Part 2: Letting Go (cont'd)

What are your three biggest fears with your business? Where do you think these fears come from? If someone waved a magic wand and these fears were gone, how would your path forward and mindset change?

Fear #1 : \_\_\_\_\_

Source of fear: \_\_\_\_\_

How my path & mindset would change: \_\_\_\_\_

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Fear #2 : \_\_\_\_\_

Source of fear: \_\_\_\_\_

How my path & mindset would change: \_\_\_\_\_

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Fear #3 : \_\_\_\_\_

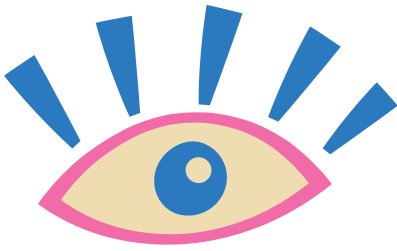
Source of fear: \_\_\_\_\_

How my path & mindset would change: \_\_\_\_\_

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# Part 3: Looking Ahead



*"When you set goals you are making things happen by focusing your attention, determining your choices, shaping outcomes and attracting opportunities to fulfill those objectives."*

*-Barbara Stanny*

What do you want more of in your business this year? What steps can you take to get more of this?

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In order of priority, what are the **three biggest things** you want to accomplish in your business this year?

1. 

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2. 

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3. 

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Think **BIG**, *like really big*. What's the most outlandish, ridiculous things you'd love to have happen in your business this year?

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## Big Picture Assessment Worksheet Section 2: Your Personal Life



### About this part...

Now that you have explored what is going well and what could be improved in your business, it's time to do the same for your personal life.

***"If better is to come,  
good must step aside."***

***- Carl Jung***



# Part 1: Letting Go & Looking Forward

How do you want to feel this year?

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What do you want more of in your life this year?

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What do you want less of in your life this year?

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What habits that no longer serve you do you need to get rid of?

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What new habits do you want to cultivate?

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# Part 3: Relationships



*"We are born moving towards connection and away from rejection but to get real connection we have to risk and sometimes be rejected."*

*-Anonymous*

Which relationships are you grateful for and what do you love about them?

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What steps can you take to improve your current relationships?

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Which relationships that are draining you do you need to let go of?

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Are there new relationships you want to cultivate?

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# Part 4: Creativity & Self-care



***"Downtime is essential for creative thought."  
-Lilla Rogers***

What is going right with your creativity and self-care?

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How can you improve your creative life and time?

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What do you need more of to increase your sense of good health and wellness?

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How can you improve the way you take care of yourself?

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# Part 5: Finance



*“If you don’t deal with your money,  
your money will deal with you.”  
-Barbara Stanny*

What aspects of your financial life are going well and which are you grateful for?

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What do you want your financial situation to look like?

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What is holding you back from the financial situation that aligns with your desires?

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# Now What?



*"Inherent in every desire is the mechanics to fulfill it."  
-Deepak Chopra*

Now that you've figured out where you are and where you want to be, it's time to bridge the gap between those two spots. The only way to do that is through action!

Go back through all of the worksheets and choose three goals you want to focus on ASAP. Then use the Goal Planning Worksheet to breakdown your goal and schedule it into manageable tasks. This is how BIG things happen - through small actions - and that's what you'll start taking towards those big goals.

Here are some tips & ways to keep you accountable:

- Share your goals with your Accountability Group or a friend and keep them up to date on your progress.
- Add your goal to the Goal Check-In Sheet in the Clubhouse.
- Reward yourself along the way at milestones instead of just when you finish the big goal.
- Be sure not to over-schedule yourself and adjust your timeline if needed.
- If you get stuck, ask for help!

# Goal-planning Worksheet

It's time to take your big dreams and bring them into reality! Use this Goal Planning Worksheet to breakdown and schedule your big bold beautiful goals. Use one Goal Planning Worksheet for each of your goals.

MY GOAL IS: \_\_\_\_\_



Look at your goal and rewrite so that it fits the S.M.A.R.T. goal criteria. SMART is an acronym (see below). Statistics show that only 3% of adults have specific, measurable, time-bound goals and they achieve 10 times as much as people without goals. THAT is why we create S.M.A.R.T. goals, so that you're in that 3%!

**S**

**SPECIFIC:**  
Target a specific area for improvement.

**M**

**MEASURABLE:**  
How will your progress be indicated?

**A**

**ASSIGNABLE:**  
Who is responsible for this goal?

**R**

**REALISTIC:**  
Do you have the available resources to achieve this goal?

**T**

**TIME-RELATED:**  
When can this goal be achieved?

Here's an example of how a goal changes after you make it a S.M.A.R.T. goal:

**YOUR GOAL:**

I want to grow my audience..

**YOUR S.M.A.R.T. GOAL:**

I want to grow my online audience by 25% to 7,500 over the next 12 months.

REWRITE YOUR GOAL AS A SMART GOAL:

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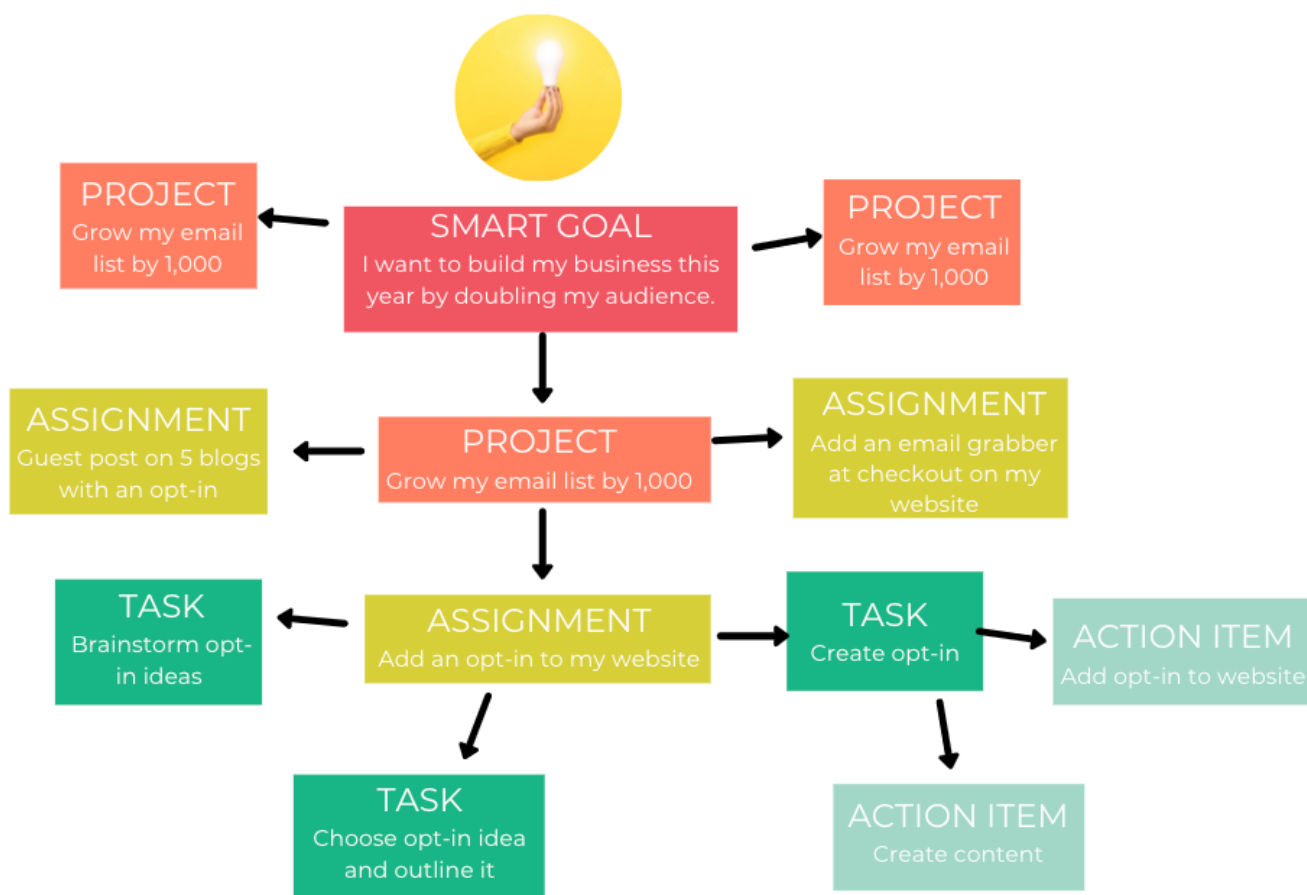
Now that you have your S.M.A.R.T. goal, it's time to break it down into manageable tasks. Doing this helps stave off overwhelm, creates an action plan so that you know what to do and when to do it and increases your chances of success exponentially.

Look at the example below of how I broke down a goal into smaller and smaller steps until the step was something that could be done in a day or portion of a day. I call these steps tasks or action items.

### GOAL BREAKDOWN ORDER:



\*Not all goals need to be broken down into action items, tasks are often small enough.



Use the next blank page to break down your S.M.A.R.T. goal.

GOAL BREAKDOWN: Use the space below to map out the path for your goal to become tasks. Feel free to get creative with markers, or go basic and use a pencil to easily edit or do it in a spreadsheet. Make sure to add a due date and the name of the person who will complete the task.

SCHEDULE YOUR TASKS AND ACTION ITEMS:

Once you've determined your tasks and action items, schedule them on your calendar.

HOW I'LL BE ACCOUNTABLE:

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