

Life/Work Roadmap Template [Home: Coaching | Life Roadmap](#)

Please print this out prior to the meeting as you will need it for the presentation

SECTION 1: Self-Assessment

1-Least true 10-Most true

Statements	Scale
I have a clear vision for who I want to be as a person.	
I know in what kind of environments I can thrive.	
I have a clear vision for my ideal love relationship.	
I know exactly how much money I want to earn and why.	
I am fully satisfied with my current level of health.	
I am fully satisfied with my current level of fitness.	
My career is very fulfilling, and I love what I do.	
I have a strong sense of how I would like my life to unfold in the coming years.	
I “respond” more than I “react” especially in stressful situations.	

SECTION 2: What are you longing for in life/work over the next 5-7 years (feel free to change the years, so it best meets your needs).

Sample categories to prime the pump:

- Health
- Fitness
- Relationships
- Quality of Life
- Work-life balance
- Financial Life
- Emotional
- Social
- Intellectual
- Career

SECTION 3: What VALUES will guide you?

Answer these questions first:

Question	Notes
What qualities do you admire most in others?	
Bring to mind a leader you respect. What qualities do you find most inspiring for you?	
To live a happy and fulfilled life, what values are most important?	
What qualities do your friends & co-workers admire in you?	
If you could pass on 3 qualities to your children, direct reports/co-workers what would they be?	

Sample values:

<ul style="list-style-type: none">• Adventure• Authenticity• Compassion• Grace• Creativity• Curiosity• Fun• Generosity• Mindfulness• Love	<ul style="list-style-type: none">• Patience• Respect• Responsibility• Self-Awareness• Self-Care• Self-Development• Self-Control• Spirituality• Trust• Kindness
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Your VALUES (5-7):

Values

SECTION 4: How will you operationalize your values with actions, strategies, tactics?

Examples:

- Verbally say “lighten up” during moments of stress.
- Laugh at myself once per day and not feel foolish to do it.
- Walk for 30 minutes each day.
- Trust my intuition – listen to my heart.
- Always be building. Have an active creative project in the works at all times, and dedicate time every day/weekend to it.
- Use “loving kindness” meditation weekly to project feelings of forgiveness to people I still carry negative feelings for and hold grudges.
- Take a cold shower for 2 minutes to start the day.
- Take one conscious breath per hour.