

# ANNUAL SELF-ASSESSMENT

A Tool to Be Used Prior to Goal Setting

by Beth Armknecht Miller



*You must know where you are before you embark on your journey. Step back, look around, and be truthful to yourself on where you are in all aspects of your life.*

**Directions:** on the following page are eight broad categories within your life experiences. To prepare for goal setting, rate each category on its importance to you and how well you did in the category during the last year. When rating each category use a scale of 1-10.

**Importance:** how important this aspect is to you in your life. For example, if personal growth and development is important to you and you value learning and growth, then you may place an importance of 10 on this category.

**Self-Rating:** your assessment of how well you performed in this area of your life. For example, if you gained a lot of weight, didn't have a physical, yet are exercising on a regular basis, you may rate yourself a 6.

# Annual Self-Assessment

QUESTIONS	IMPORTANCE	SELF-RATING
<p><b>Personal Growth and Development: These are goals surrounding your learning and the changes you've made based on your learning.</b> What have you learned during the last year? What training, reading, and association meetings did you participate in that furthered your growth as a professional and as an individual? How have you incorporated the learnings into change for the better?</p>		
<p><b>Health: These goals are related to your physical well-being.</b> What did you do to help improve your health and physical fitness? Have you incurred any major health issues during the past year? Have you had your annual physical? What physical activities have you added or subtracted from your life? What kind of food regime are you following? How has your doctor rated your physical and mental health?</p>		
<p><b>Relationships: These goals center on the quality of your personal relationships with the people who are significant in your life.</b> How would you describe the quality time you have spent with your family? What special experiences have you had with family and friends? Were you always available for the important people in your life? Have there been relationships that have been lost, forgotten or strained?</p>		
<p><b>Spiritual: Spiritual goals revolve around exploring the meaning and purpose of your life. How is spirituality a part of your life?</b> Are there times when you feel you need more or less spirituality? What is your purpose on earth? How does your spirituality impact who you are and the actions you take? Do you feel at peace with yourself?</p>		
<p><b>Career/Business: Goals centered on your profession, career progression, and/or the business you own.</b> Did you accomplish your business goals this year? What things that were in your control, weren't accomplished? What is your biggest accomplishment and disappointment as a leader?</p>		
<p><b>Financial: Financial goals centered on money; they often influence some other goal categories such as fun and community (philanthropy).</b> Do you have a retirement plan? When was the last time you reviewed the plan? Do you have a will and when was it last reviewed? Are you satisfied with your current financial situation? What are you doing to improve your situation if you aren't satisfied? Did you meet your financial goals for the year?</p>		
<p><b>Fun: These goals are all about personal enjoyment and pleasure. What does fun look like to you?</b> What activities do you engage in that are fun? Have you made enough time for these activities? What have you put off that would have been fun for you? How do you make work and business fun?</p>		
<p><b>Community: These are goals revolving around volunteerism and philanthropy- the giving back to society.</b> How did you help to improve your community? Who did you help? Did you engage others in improving the community? What volunteer work did you add to your plate or did you lessen your volunteer activity? Do people look to you for leadership in the community?</p>		

## Next steps in the goal setting process:

1. Identify Your High Priorities: What are those areas you ranked as most important to you yet you have assessed your performance lower than its importance? Which areas have the biggest gap?
2. Determine what commitments/goals you can make that will close the gap between importance and performance.
3. Create SMART goals using the Creating SMART Goals document on Executive Velocity's website

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Beth Armknecht Miller's passion for learning, and dedication to helping others, are strands woven throughout her distinguished career, which continue to guide her work with Executive Velocity, a top talent and leadership development advisory firm.

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