



THE VISION WHEEL

The Vision Wheel is a self-evaluation tool that helps you realize where your strengths and weaknesses are when it comes to vision. Don't worry about your scores—we are all works in progress. Completing the wheel exercise is easy. After you go through it once, you'll be a pro. And if you become discouraged because there is still progress to be made, always remember we are looking for progress, not perfection.

The wheel exercise begins with a set of questions. After you read a question, simply rate yourself on the following scale: Poor (1-3), Fair (4-5), Good (6-7), Prosperous (8-10). Each wheel diagram contains a set of spokes, similar to the spokes on a bicycle wheel.

After you answer each wheel exercise question, chart your answer on the wheel. Find the spoke that matches the label of the question. Then, simply place a dot on the spoke next to the number that corresponds with your answer. After scoring yourself on every spoke, connect the dots to create a circle. Note that the higher a number is, the closer it is to the outer section of the wheel, while lower scores are more toward the middle. Now, at the end of each spoke, list the names or titles of people or organizations that provide you with this type of support. It's okay to list the same person, title, or organization in more than one spoke.



The Vision Wheel

(20 minutes)

Date: _____

Rate your response after each question using a number from the following scale:

Poor (1-3), Fair (4-5), Good (6-7), Prosperous (8-10)

Poor			Fair		Good			Prosperous	
1	2	3	4	5	6	7	8	9	10

Life Plan: A life plan is an overarching life vision that includes a Personal Manifesto by which you live. How well are you doing at creating a life plan?

Professional Plan: This is a career or business plan that will help you align your gifts with a need in the world. How would you rate yourself at coming up with a professional plan? _____

Work-Life Balance: A work-life balance plan protects your personal life, including your relationships and overall well-being. When it comes to work-life balance, how would you rate your ability to come up with a plan?

Financial Plan: This spoke refers to the Financial Planning component on The Financial Health Wheel you completed in the introduction. How would you rate yourself when it comes to creating a financial plan with goals, action items, and accountability? _____

Intentional Living: Living with intention is living according to positive statements that reflect ways of being that will help you achieve your goals and vision. How would you rate yourself when it comes to living with intention? _____

Visualize Success: This is the practice of regularly envisioning yourself achieving success in various aspects of your life. How good are you at visualizing success in all aspects of your life? _____

Daily Practices: Having daily personal, professional, and/or financial behaviors or routines will help you achieve your vision. How well do your daily practices help support your vision? _____

Health Goals: Your mental, physical, and spiritual wellness and aspirations are your health goals. How well do your health goals apply to your overall well-being? _____

Relationship Goals: These are your needs and ideals for love, connection, and support aspirations. How much thought have you put into what you want your relationships to look like? _____

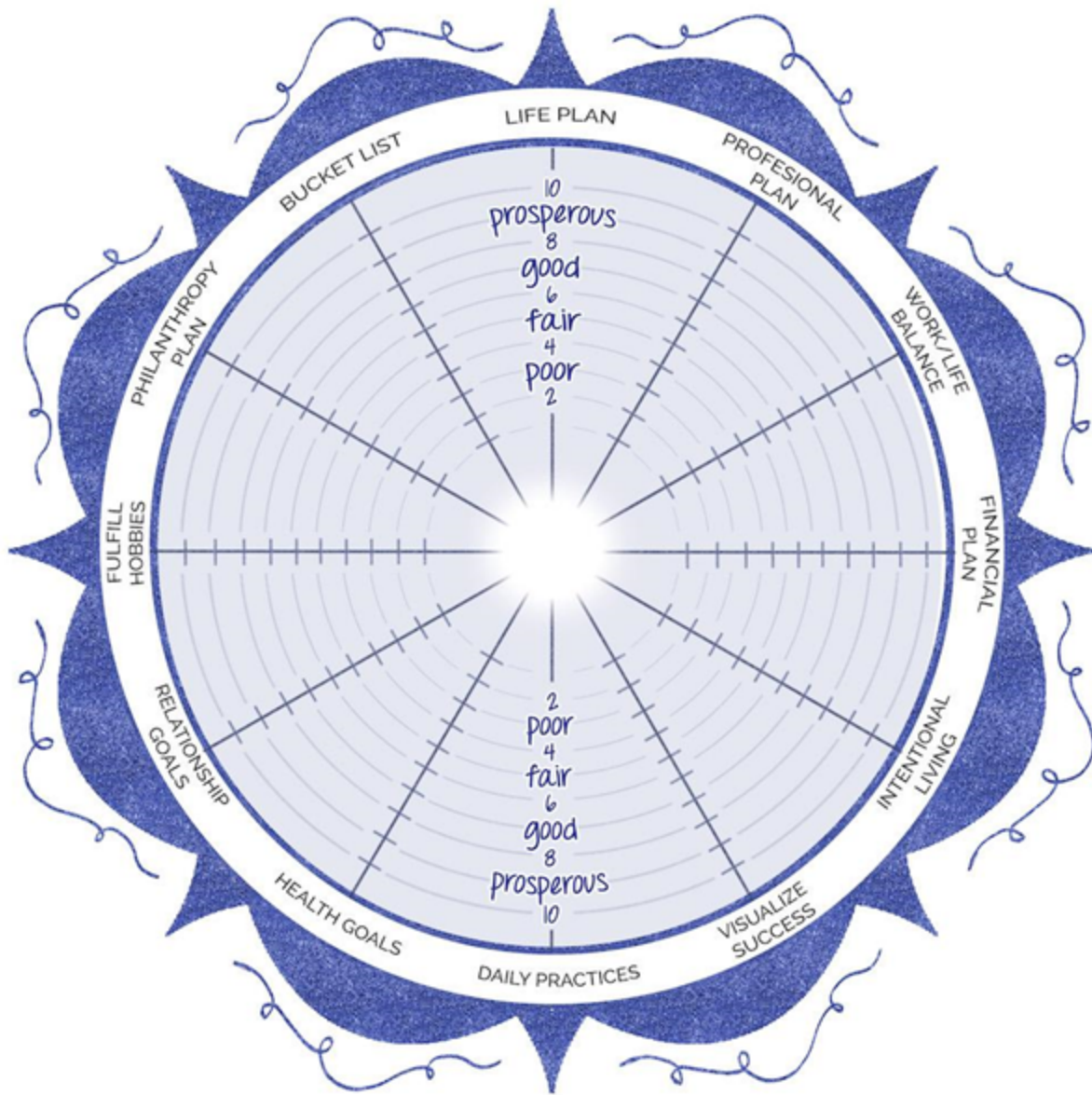
Fulfill Hobbies: Do you take time for fun and leisure activities that you enjoy? How much priority do your hobbies have in your life? _____

Philanthropy Plan: Do you have a plan for how you are going to be of service to the world in a greater way; are you clear on the legacy you want to leave behind? How would you rate yourself when it comes to creating a philanthropy plan? _____

Bucket List: This is a list of experiences that you want to be sure to get out of life. How good have you been at identifying what you want on your bucket list? _____

Chart your responses on The Vision Wheel. Start at the top: are you Poor, Prosperous, or somewhere in between when it comes to having an overarching Life Plan? Put a dot on the spoke next to the number that corresponds with your answer. Now, continue going around the wheel and after scoring yourself on every spoke, connect the dots to create a circle. Remember, you are measuring if you have created a plan for that vision, not if you've achieved that vision. That will come in time!

Date your wheel and file it for later reference. Consider revisiting this exercise monthly or quarterly to continue to create more support in your life.



The Vision Wheel

Answer the following questions:

- As you look at the biggest dents in The Vision Wheel, what areas are in most need of attention when it comes to creating a vision?

- What roadblocks or challenges are you experiencing when it comes to improving your vision in certain areas?

- What kind of support do you need?

Worksheet by Joyce Marter, LCPC

Author of *The Financial Mindset Fix: A Mental Fitness Program for an Abundant Life*

www.joycemarter.com