

Personal and Professional Inventory Workbook

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A critical part of how we measure our personal and professional worth, and in some cases our self esteem, is the review and acknowledgement of our strengths, experiences, knowledge, qualities, achievements and activities.

This workbook has been designed to assist you in identifying these characteristics from your own perspective, and to also seek out the perceptions of others for comparison.

Instructions: You may either use this workbook itself to document your discovery process, or you may choose to use another format such as a journal or a separate electronic version matching your personal style (such as a Word or Excel document).

The first “pass” through these questions are for you to complete, and additional information is provided with each question to assist you.

The second and subsequent “passes” through these questions are for you to have key people in your life complete from their perspective – or as they see you and your strengths. The purpose of asking others for feedback is to compare the similarities and differences between how you see yourself and the strengths and qualities others see you demonstrate.

There will be follow up activities in the last section of the workbook for your further consideration and exploration.

Please note that one of the potential risks with this exercise is when the individual is not willing to believe the information documented, regardless of whose perspective it is from. The reasons for this may be quite varied, so if this happens to you in any form, please discuss this with your support person, which may or may not be your coach.

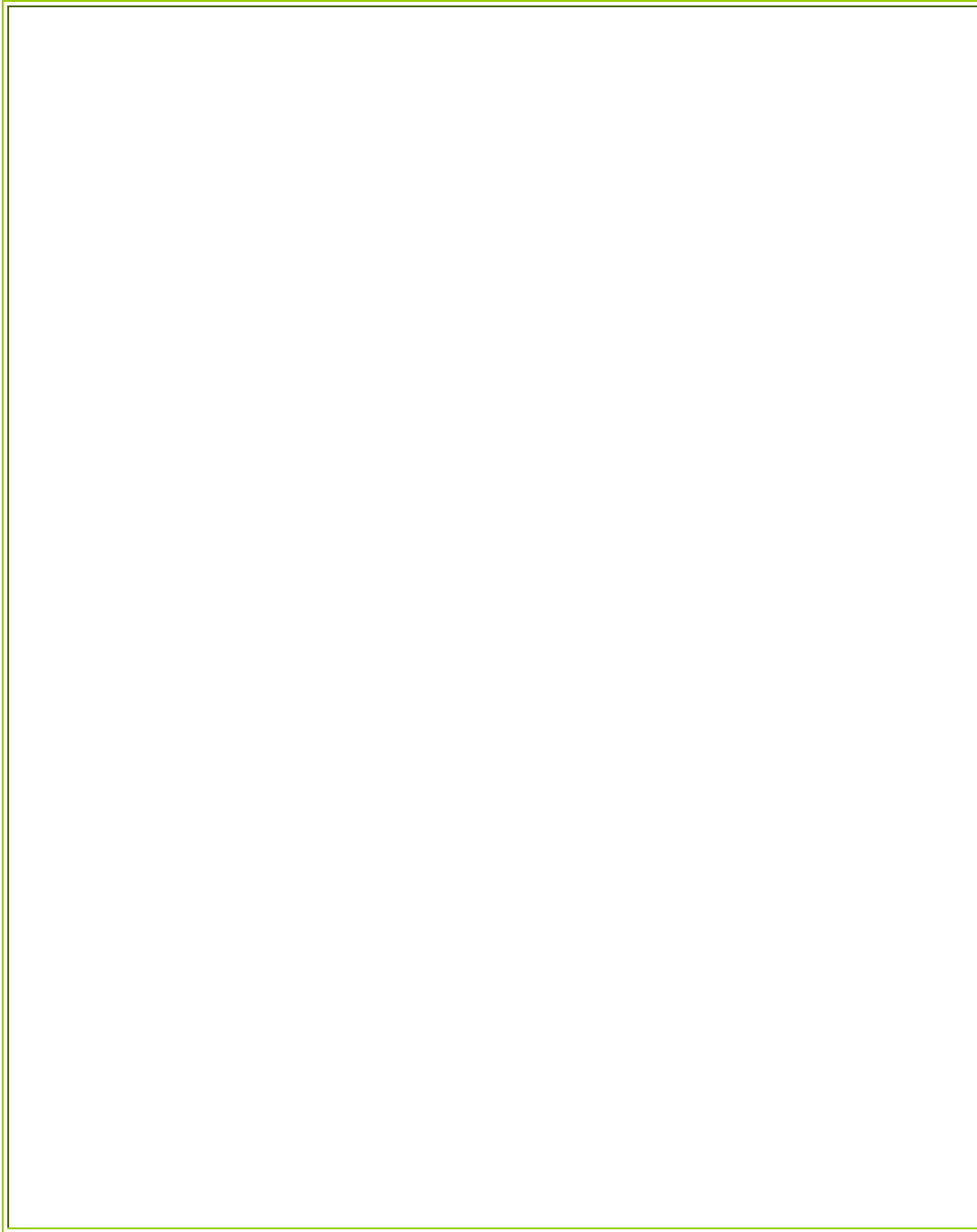
However, if you are willing to accept and believe the information this exercise brings out, you may then be in a much better position to celebrate your strengths and achievements, learn from the “tragedies” and tap into your amazing personal and professional resources to achieve the objectives you desire in any part of your life.

Please also note that throughout the various sections of this exercise, you may find that you are repeating answers. This is just fine, as these are potentially areas of extreme strengths for further exploration.

SKILLS AND ABILITIES (This Is What I Can Do)

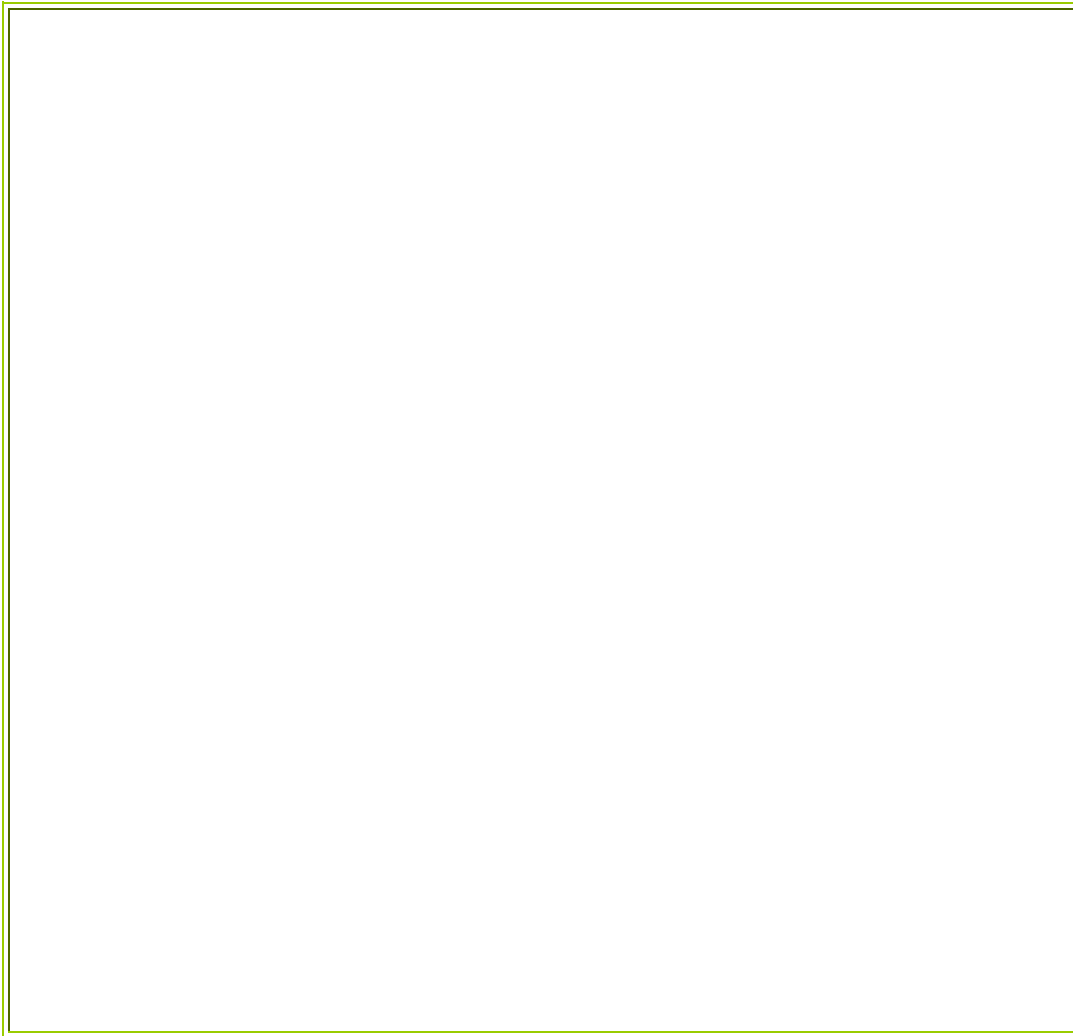
We start by looking at your skills and abilities in a very general sense. The purpose of this question is to begin the process of acknowledging the wealth of abilities you have without any particular judgement of their relevance to any particular objective. In this section, list all the things you know how to do, and be careful not to judge yourself too much on the expertise level. Similarly, challenge yourself to think of your skills sets aside from just a career perspective, although please include those as well. For example, if you’re a parent, what are all the skills you have from that perspective? If you enjoy an active social life, which of your skills and abilities enable you to be successful at that? If you are a leader in your career environment, what are the skills you utilise there? Consider the categories of home, family, social, financial, career, business, spiritual, sports and other interests in your list and try to put down as much as possible.

SKILLS AND ABILITIES (This Is What I Can Do) – Continued




EXPERIENCE (This Is What I Have Done)

In this section, list your experiences throughout your life. Ideas to inspire your thinking include: places you've lived, significant events in your life, getting married, a relationship that's ended, having children, starting a business, closing down a business, receiving an award, military service or your first art exhibit. Experiences from all areas of your life make up who you are and how you perceive the world. Please include the experiences that you perceive as positive and/or negative, as you have gained something from every experience even if it may seem difficult to identify either at the time or now.



KNOWLEDGE AND UNDERSTANDING (This Is What I Know)

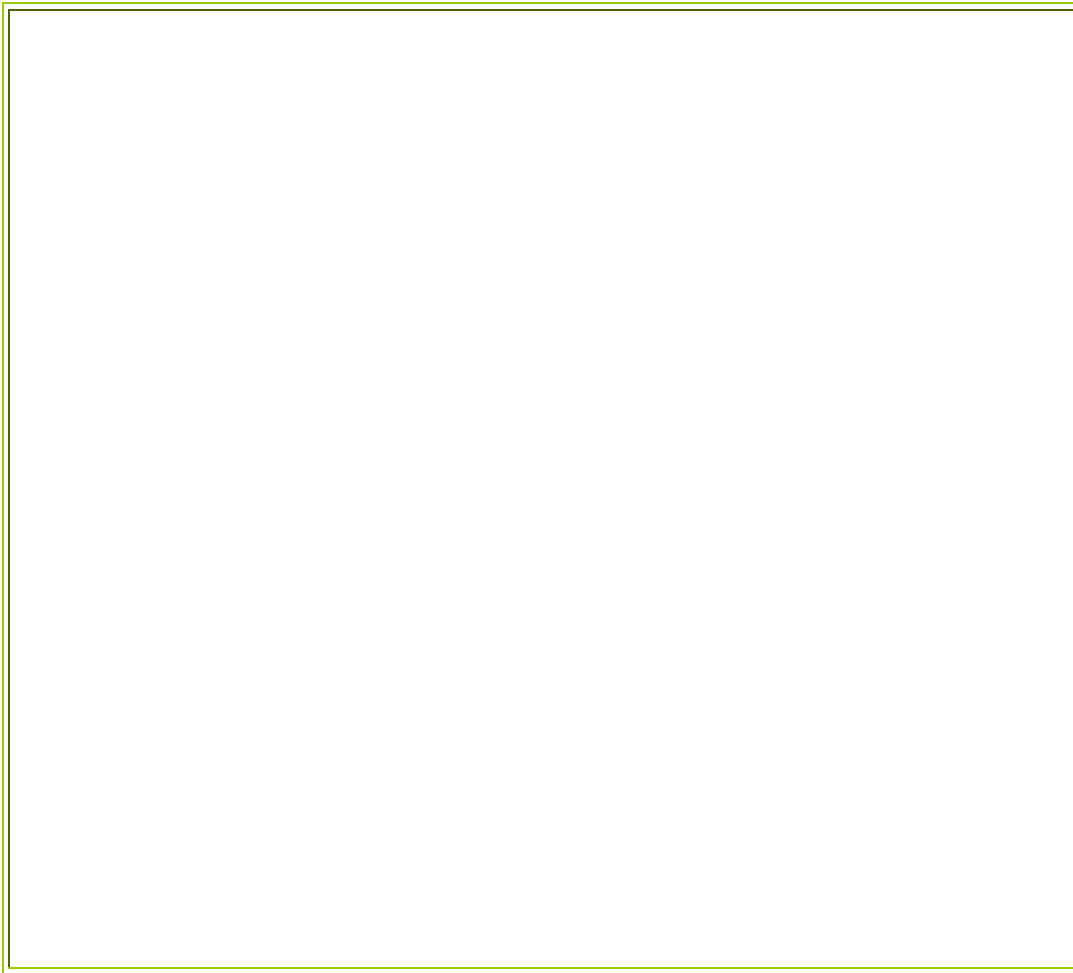
We all have an incredible wealth of knowledge and understanding on a variety of topics. This section is for you to list the areas in which you identify that you have both knowledge and interest in. For example, categories of information may include personal development, business strategy, sports, the Arts, cooking, working with teens and so on. When you have a broad category such as Art for example, challenge yourself to break it down into the more specific areas, such as oil painting, cubism, sculpture, performance art, running a gallery exhibit, and digital photography. With this, you'll be able to identify areas in which you recognise your own level of expertise and passions. Some people find as a starting point for this section that it helps to look at your bookshelf to see what you've read and therefore have accumulated knowledge about,



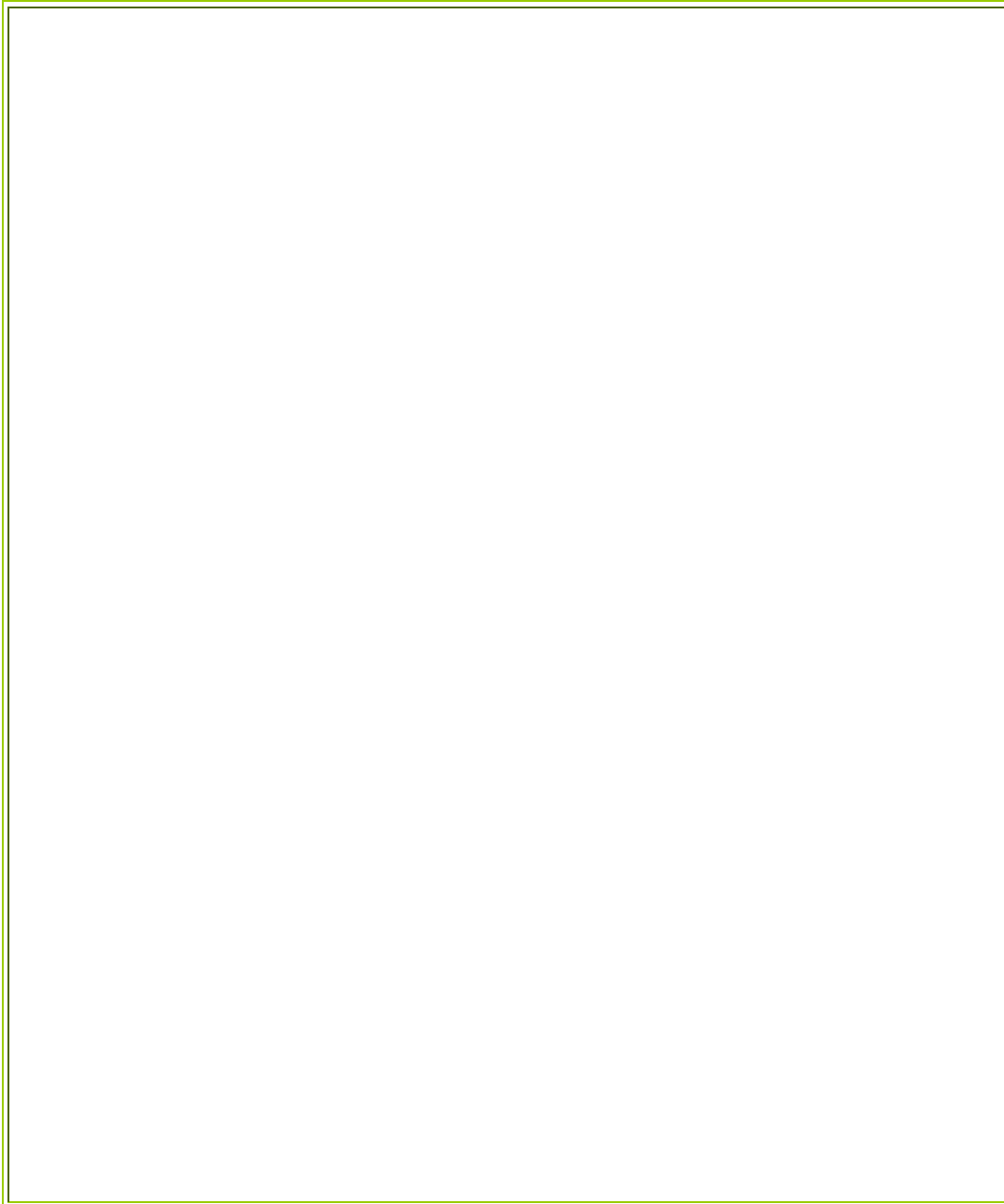
QUALITIES (This Is What I Am and My Personality Traits)

You are full of many qualities. Some you recognise as strengths while others might be areas you'd like to work on further. You may want to break this exercise into two sections. Strengths may include things like being a good listener, empathetic, spiritual, funny, insightful and intuitive. Opportunities for further work may include being impatient, interrupting people when they speak or not being internet savvy just yet.

Qualities



Opportunities for Further Development



MEMBERSHIPS (This Is Who I Identify With)

Memberships, or the groups or types of people we identify with or would like to is an interesting and important part of our self-awareness and strengths celebration process. For example, if you identify with a group called, “successful entrepreneurs”, then you are likely to exhibit some similar traits to this group. If you identify with a group called, “single parents” then it is likely you acknowledge the strengths this group of people typically have, and therefore you may be able to recognise similar strengths in yourself. In the first part below, list the groups of people you identify with now. In the second part, list those you would like to identify with as this information is also useful in determining what strengths and characteristics you’d like to further develop or simply identifying how you see your future or who you’d like to meet.

Memberships / Groups Now

Memberships / Groups Future



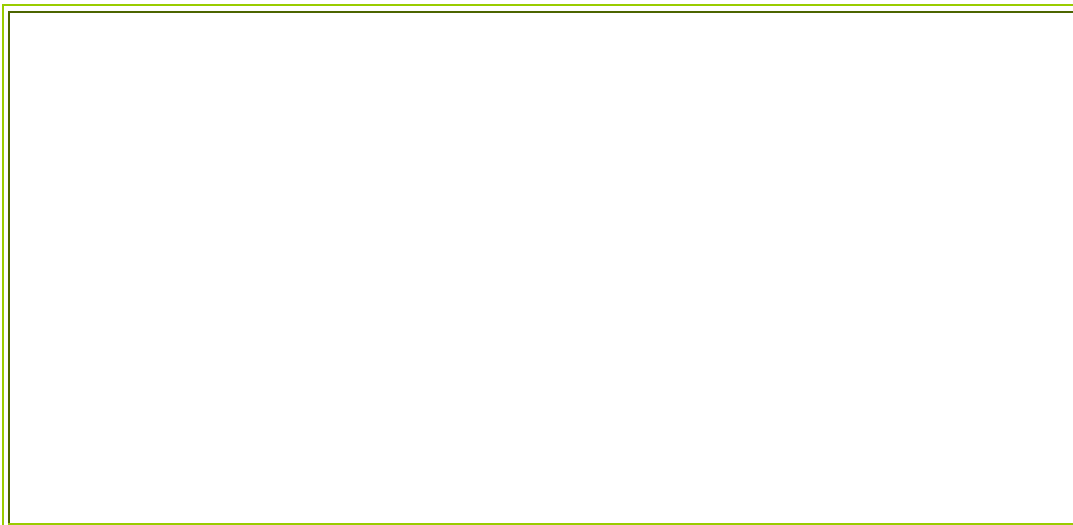
HIGHLIGHTS/ACHIEVEMENT IN MY LIFE (This Is What I Am Proud Of)

This section is a bit different than just listing your experiences. It focuses on the significant moments of your life, whether they be at first glance an achievement or a tragedy. For example, some achievements for you may include being a recognised expert in a particular field, winning an award, overcoming an addiction or meeting your soul mate. Tragedy Achievements may include surviving cancer, overcoming amazing obstacles, being stronger after experiencing a divorce, or having a positive attitude after being the victim of a crime. Try not to dwell on the negatives which may come up here, but the positives of what you've gained from the experiences. However, if this section brings up difficult moments, please discuss with your coach, support person or maybe in some instances you may need to seek the services of a doctor, counsellor or psychologist depending on the nature of the issues that have been raised.

Highlights of Achievements




Tragedies (Achievements)



EDUCATION & QUALIFICATIONS (This Is My Educational Standard)

Not all of our education and qualifications are documented on a diploma or some other formal piece of paper, but it's a good place to start. In this section, list all of your academic achievements. Then, take it a step further and consider measurements of your credential in a different light. For example, if you've been in the project management industry for 15 years, then you have 15 years experience as a project manager. Have you been a parent for 5 years? Have you been doing photography for 20? Have you been a trainer in more than one culture, or have lived and worked in a number of different cultures around the world. It all counts! Consider your qualifications in a variety of ways, including simply having a particular experience or set of experiences, and document everything you can think of.



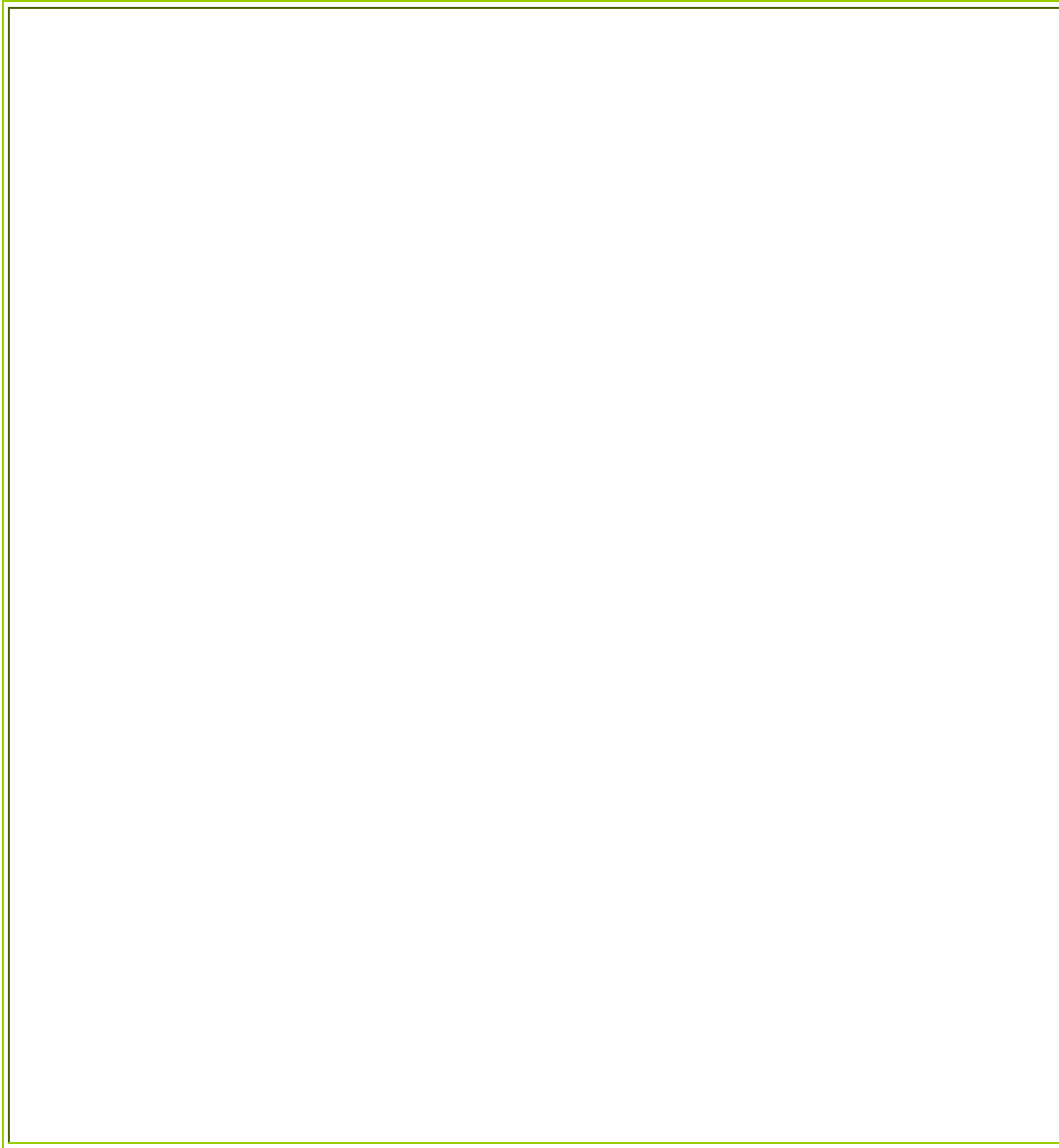
VOLUNTEER WORK (This Is How I Give)

How we give of ourselves to others can be one of the strongest builders of our self-esteem. And, it doesn't always have to be about how much money we donate. We may give our time, listen to a friend who just needs to vent or offer our skills and experience to individuals and/or groups that need our help. Document all the ways you give to others and please also note, that it's important to understand how you give to yourself. Without paying attention to your own needs, you become less resourceful to assist others with their needs.

Giving to or for Others



Giving to or for Myself



360 DEGREE FEEDBACK

Now that you have completed this workbook from your own perspective, you have the opportunity to gain insights from how others see you. 360 Degree Feedback is a term used most often in a business environment where an individual self-assesses their strengths, and then asks the person they report to, their colleagues and the team they manage to evaluate them on the same criteria. In some cases this is extended to customers, vendors and alliance partners as well. We can use this same format in our personal lives and ask key people with whom we engage or have a history with to share their perspectives of us. Examples of these key people may include: friends, partners, parents, siblings, children, colleagues and various business relationships.

Your challenge in this section, if you choose to accept it, is to identify at least three key relationships in your life and ask them to complete this workbook about how they see you. You may either give them a blank copy of the workbook, or give them the categories in a separate email or document of your own. Some people choose to simply have a conversation with these people, or possibly interviewing them about their perceptions. Feel free to get creative with this.

Keep in mind however that by doing this 360 process, you must be willing and open to the feedback you receive, and to an extent be willing to believe what other people share with you. If someone else sees in you a particular strength, they have good reason to believe it's true from their perspective. Based on how they measure such things, they must have seen evidence of this strength in you; therefore it is a true strength in their mind even if you're hesitant to believe it.

When asking others for their perspective, it is reasonable to think that the other person will expect a level of respect for their opinions from you. Remember, they have shared their time and have been willing to be open with you. Contradicting their feedback may inhibit them from sharing valuable feedback with you in the future.

As the feedback comes in from these various sources, you may wish to also share this with your coach or appropriate support person.

Finally, some of the questions in the next session specifically refer to the feedback you gain from others.

Exercises for Further Consideration and Exploration

Below are a series of questions you may wish to consider when reviewing your answers to the sections in this workbook. You may wish to document these in a journal or another format, or simply discuss with your coach or relevant support person.

- How difficult did you find this exercise in general to complete? What do you feel this is attributed to?
- How much did you find yourself “judging” the quality of your answers, or more specifically the strength or quality of your experiences? Do you know what’s behind your judgements?
- Are there any experiences that stand out for you as significant to how you see your personal and or professional strengths? If so, what specifically is remarkable about these experiences, and/or the strengths or characteristics you learned about yourself based on these events?
- When you considered the groups or “memberships” you belong to or identify with now, what new insights has this provided about how you generally view yourself?
- Can you imagine any ways in which you might “tap into” your existing memberships to further your personal or professional goals at this time or in the future?
- When you consider the groups or “memberships” you wish to identify with now or in the future, what changes need to occur in your thinking, behaviour, or personal/professional development which would lead you to identifying yourself as a member of that group?
- What core strengths have you identified based on the achievements you’ve listed?
- What have you learnt about yourself based on the “tragedy achievements” you’ve listed? Are there any core strengths you’ve developed as a result of these experiences?

- When you consider your education and qualifications, what do you now see as your “credibility” that you may not have acknowledged before? What would you like to do with this new insight?
- When you consider how you give to others, what are the strengths you’ve identified you have here? Are there any new actions you’d like to take, or any changes in your behaviour you wish to consider as a result?
- Did you find your answer to how you give to yourself, honouring your own needs, difficult or uncomfortable in any way? Please explain. And can you imagine any changes you’d like to make as a result?
- Do you feel that there is an in-balance in your giving to others and your giving to yourself? If so, what is the nature of that in-balance and what would you like to do about it?
- What new insights have you gained as a result of the 360 degree feedback you’ve received from others?
- Did you find it difficult at all to accept what others see in you as real? If so, how does this make you feel?
- When you consider how you responded to the individuals who provided you feedback, how well do you believe they feel you’ve openly accepted their feedback? How might they have measured your response to them in general?
- What do the people who provided you with feedback expect you to do with the information? Are they expecting to see any particular changes, and if so what, when and why?
- Overall, what strengths has this exercise highlighted for you that you wish to tap into more regularly / consistently in order to achieve the outcomes you want in your life? These strengths are part of your personal resources and it may be helpful to identify now how best to use these resources.
- Overall, what opportunities for improvement has this exercise highlighted for you and what do you wish to, or plan to and/or will do something about? Please be specific in your answer including identifying detailed actions and when they will be performed.

- And finally, how do you generally feel about yourself now that the exercise is completed, as compared to how you felt about yourself and your strengths at the beginning?

EXERCISES TO FOLLOW ON FROM THIS WORKBOOK

Here are some further exercises you may wish to consider doing as follow-up learning opportunities based on your experiences with this workbook.

- Write a professional biography profile of yourself based on all the information you've written here. Try to write no more than 250 words, but still promoting yourself based on all the great skills, qualifications and traits you have. This is very similar to writing a CV or a cover letter, or you could imagine you are handing this to a radio or television station as a press release. If you actually do have a professional need for such a biography document, then make this a very real and practical exercise for yourself with the outcome being the real document you might share with others.
- Write an open letter to the individuals who have provided you feedback, outlining what you have learnt about yourself from this process. You may wish to include in this letter how you will use the strengths identified, what areas for development you will be working on and how, and to identify to the "readers" what changes they can expect in you and why these changes are important from your perspective. This requires a certain amount of openness and vulnerability. And finally, it may be critical to include an acknowledgment and expression of gratitude to those who have participated in this exercise and provided feedback to you.
- Create a list of your top ten strengths / characteristics / qualities and post these someplace where they then become a visual reminder or affirmation of your core strengths.
- Create an action plan for each area of further development or improvement you wish to achieve. You may elect to work on this with your coach, or invite one or more of your feedback providers to be a part of this process with you, to keep you accountable and have someone to share in the celebration of your successes.
- Share this exercise with someone else who may also benefit from completing it. And in so doing, be willing to help them see their amazing strengths and resources in a positive, constructive and supportive way.

Acknowledgements and Further Reading

This coaching resource document was created by Noel Posus, Director of askacoach.com and contributed to by other members of the team, drawing on specific coaching skills, models and knowledge from our individual and collective experiences.

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