

Personal Evaluation Toolkit

P.E.T. 2018

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The Original Goals & Habits Tracker 

**“Each new day begins a New Year and each
New year begins a new day.”**

Starts Now!

Compliments of MG and THF.

Welcome!

*“You’re working smarter
when you’re working harder
on yourself.”
~mg*

*“True nobility isn’t about being better than someone else...
it’s about being better than you were before.”
~Dr. Wayne Dyer*

Congratulations and thank you!

I’m hopeful you will find this Kickstart and P.E.T. (Personal Evaluation Toolkit) very helpful! These are exercises that have proven to help people identify direction, purpose, strengths and weaknesses in order to get *a little better every day!*

Unfortunately, many people remain in two distinct “buckets” as they go through life. They are either complacent and they never actually set goals or, they are so busy spinning their wheels (because life is busy after all) that they don’t proactively take the time to STOP-PAUSE and PLAN where they are going, what they represent and what’s important to them.

There tends to be little understanding and acceptance that in *this* world life *demand*s change. Yes, the only constant is *change* – so if you are not getting better unfortunately, you are getting worse. It is impossible to stay ‘the same’.

It's great that you recognize this simple truth, that nothing is static in this world—even the universe. That is basic physics. So, what worked today may be obsolete tomorrow. *Change is truly the order of the day. TIME takes no prisoners.* So, in order to keep pace with time doesn't Personal Development make a great deal of sense?

To be on a mission of *constant self-improvement*. Sounds hard, right? Well, **“There are two great pains”** Jim Rohn used to say **“The pain of discipline and the pain of regret.”**

One of the most successful people I know maintains this very philosophy. He simply keeps identifying a weakness – focuses upon its improvement and turns it into a strength. Many “gurus” will tell you to ONLY focus on strengths... Well, I wouldn't recommend that... ;)

Seriously, there are countless examples of experts who've overcome a weakness. In fact, it's because of the weakness, not despite it that they grew and ultimately created value. For instance, the speed reading teacher who was himself a terrible reader. The person that can't lose weight... finally discovers a process that works for her and she becomes an “expert”. The person who is always broke, learns how to become rich (Google T. Harv Eker's name and listen to his story of being totally broke and miserable to multi-millionaire.).

As I shared; I struggled with things like discipline, focus and goal-achievement. So, what did I do? Accidently found a process that proved remarkable— a game changer— not just for me but for thousands of others and in the process developed a specific tool (app) and methodology that is *repeatable*.

Did it happen overnight? No.

The beauty is, as it relates to YOUR Personal Development, *you hold all the answers* as well as *all the questions*. The key is being

exposed to the proper questions to draw-out the *powerful answers to set you on the right path.*

Opportunity is missed by most people because it is dressed in overalls and looks like work. ~Anonymous

I've probably lost many of you already. This starts to sound like work doesn't it? Answering questions, filling out stuff and thinking deeply... about yourself.

However, *THIS (doc) is the real opportunity disguised as work.*

So, again, congratulations! Think about it— you wanted this document for a reason, right?

Perhaps, something moved you to request this Kickstart and personal evaluation toolkit (P.E.T.). Typically, that something is your *intuition* or *voice* and it's important you recognize and respect it. Your conscious is telling you something “Hey, let's work on a few things to get better.”

Listen to that voice and trust it - become friends with it. Make this a habit and it can become your greatest ally.

Do experiment with your intuition and try to make a habit of calling upon it each morning and then begin to journal or write down some answers.

As you recognize, in order for your *world* to change **YOU** must first change. You must begin to do things (even small things) *differently.*

Ownership and responsibility can transform your world *immediately!*

And, with belief, patience, and an open mind and heart you have the ability to transform your destiny - ***to CREATE YOUR IDEAL FUTURE... one day at a time.***

This happens both instantly and over time – so it’s important to celebrate and recognize even the smallest wins. It’s important to track those daily habits (see the end for a full-break down of The Habit Factor process) you’ve identified as significant to your improvement and progress.

I’m confident this Toolkit and using a Tracking tool (free [template](#) or app: [IOS](#) or [Android](#)) will help you to begin your process—your journey.

“Each new day begins a new year and each new year begins with a new day.”

All the best!

BTW: be sure to check out the top-ranked, “[Habits 2 Goals](#)” podcast. It can really help to keep you focused —on the right track for your goals and in the right *mindset!* ;)

~MG

HOW TO USE THIS TOOL

This is a document for YOU. You are the one who completes it and you are the one who does the evaluation. The core premise is that these questions will help *you* identify those areas that need attention and improvement.

When I have performance reviews with my employees, I have them to do their own review.

Yes, this only works when there is a core foundation of *honesty* and *trust*. I know that I could never provide as comprehensive a review of their performance as they could.

They are far more aware of what they do every day. Likewise, in the event you already don't know it, you are your own best critic (despite the fact that many times it seems like your spouse is ☺).

Please always be careful to temper your own critique with a dose of *optimism* and *healthy self-esteem*. There is an important distinction between being your own best critic and beating yourself up!

*****TIP*****

DO NOT BEGIN THESE EXERCISES IF YOU DO NOT HAVE *AT LEAST* TWO FULL HOURS *TO DEDICATE* IN CONCENTRATED, FOCUSED ATTENTION.

MORE TIME IS PREFERRED BUT THAT IS AN ABSOLUTE MINIMUM FOR YOU TO RECEIVE ANY VALUE.

BTW: If two hours seems like a lot of time, well, your priorities are not set properly. This is fundamental to YOUR LIFE – (what’s two hours in the big scheme of things?) and will truly help provide some fundamental building blocks. It is far more important than watching TV. And, statistics suggest you will spend at least 10 Hours watching TV just this week.

As you answer these questions, if you feel you are stuck on any of them – I urge you to ask the following question,

“What am I pretending I do not know?”

If you’re still stuck, just move to the next section and revisit it later.

It’s important to add that simple question any time you are not sure you have a good, meaningful answer. *Again, the only value this form will provide is the value YOU give it.*

Let the truth serve and guide you.

Values – List

Below list your core EIGHT most important values. Example: Love, Integrity, Family.

*****TIP***Take a lot of time on this** – some people have been known to spend weeks contemplating their deepest values. You should know your EIGHT most dear values IN ORDER. In other words; if I said I was going to take away your values, you would fight to the death to keep them and if I asked which one you could part with compared with the top value you would know which is the most important and least important. (Perhaps a little dramatic but it gets the point across). I recommend you concentrate deeply on these – do the best you can now and revisit in a few days to see what new values may have come up.

Warning: This is the hard work. Most people simply won't do this.. and they get the same results and wonder why. Take the time to do this. Sleep tends to bring many clear visions and ideas. *Recommend you do this in pencil to begin!*

_____	_____
_____	_____
_____	_____
_____	_____

Values Death-Match

(Designed to help you identify #1 value and a value Hierarchy)

(Example: Love is more important than Integrity)

_____ is more important than _____

_____ is more important than _____

_____ is more important than _____

_____ is more important than _____

WINNER!

If you've truly taken the requisite amount of time and concentrated hard (even meditated) on the answers – it will literally be impossible for your life to remain the same. Once you couple that awareness with action the seed (awareness) is watered (action) and the fruits of your desired outcome are certain to manifest. Much like an tree which is planted and cared for, the fruits are guaranteed to be produced with care, diligence and patience.

BTW: Yes! These can and will change over time and that is okay!

VISION

Clarity is 90% of success

All things are created twice, first in the mind and then in the physical world.

Where there is no vision, the people perish: ~Proverbs 29:18

Vision is almost everything... the majority of people unfortunately lack vision and that makes life very hard because it's tough to hit a target you can't see. Courage must follow any vision... but VISION, "beginning with the end in mind" comes first.

Press Release Exercise:

Step into the time machine... Now, dream and travel five years into the future. Look back and envision you could wave a magic wand without concern for HOW it would happen... what would you have accomplished? Now, write your own press release about it. For instance:

Newsire: 2/28/2020 San Diego

Today <<NAME>> set a new personal record in the mile and finished his fifth marathon. He's also earning a record income doing what he loves << fill in>>. <<Name>> had this to say, "I can recall five years ago when I really took the time to establish the priorities / the key goals and the habits that would help me get there. It wasn't easy but it was well worth the effort. I've added more value to my life, my family and community and I really enjoy doing << >>> Dream... it doesn't matter if you're 25 or 75!

Obituary Exercise

Today <<NAME>> passed away peacefully in her home at age <<>> She was surrounded by family and friends. <<Name>> was a stalwart in the community and was best known for inventing <<>> her family knew her as an always kind and loving mother, sister and wife.. Highlights of her life included living abroad for a year, hiking through Yosemite and Yellowstone in the winter and running with the bulls...

(GET after it – Go read some obituaries!)

****TIP**** Deeply consider that if you died tomorrow, what is it that would be the biggest regret regarding any experiences that you've missed out on? Writing a book, visiting the Great Wall of China?

Personal Mission statement!

<https://www.quora.com/What-is-a-personal-mission-statement>

<https://www.quora.com/What-is-the-best-mission-statement-youve-seen-and-why>

<http://msb.franklincovey.com>

Mine: Total freedom of action and creation. To share, spawn and inspire an abundance of health, happiness, love, kindness, wisdom, wealth and philanthropy.

Notice it involves values (later exercises) and is short. Ideally you can remember and recite it quickly often. That helps to keep you motivated and pointed in the right direction during tough times. ;)

PERSONAL CHARACTER TRAITS / QUALITIES

List EIGHT (8) of the BEST QUALITIES of your favorite person
(could be best friend, family member hero/movie star, etc)

_____ (person's name or initials)

_____	_____
_____	_____
_____	_____
_____	_____

List EIGHT (8) of the least favorable QUALITIES of any ONE PERSON
(could be friend, family member hero/movie star, etc)

_____ (person's name or initials)

_____	_____
_____	_____
_____	_____
_____	_____

Do the same for YOURSELF – list your most favorable and least favorable character traits.

My most favorable qualities

_____	_____
_____	_____
_____	_____
_____	_____

My least favorable qualities

_____	_____
_____	_____
_____	_____
_____	_____

****Tip**** *Recognize that these qualities, in order to improve, require acceptance and not resistance. Do not resist answers.*

YOU SAY: “A GREAT PERSON MUST HAVE THESE THREE QUALITIES:”

In order of importance (*personal preference*).

_____, _____, _____

Character Evaluation, Key Take-away

Notice how the most favorable and least favorable qualities align with your personal most favorable and least favorable. Noticing qualities in others helps to create the awareness of the same qualities in ourselves. With this awareness we can then focus on areas for improvement. Rest assured, the improvement process begins most fundamentally with awareness.

ASSESSMENT

MY PATIENCE LEVEL IS

Perfect *Needs a little work* *Requires a lot of work*

THE HIGHEST FORM OF MATURITY IS

Independence *Interdependence* *Dependence*

THE WORLD IS _____ (circle one for each line)

An unlimited, massive Pie *A pretty Big Pie* *Small Pie*

I often see things as Black or white... it's easy to see one way or the other.
Black and White *Shades of Grey*

ENERGY: In MOST of my personal relationships I am a (+) or a (-)
That is, I *add* energy (compliments, praise) or drain energy (fighting, criticizing, arguing, nit-picking) . This habits make me an **asset** or a **liability**. (circle one)

I donate my time or energy to charitable causes monthly. YES NO

I am my optimal weight. True False

I exercise at least 3 times a week. True False

TIME is MONEY True False

**Current Feelings: Answer each with regard to your feelings about them.
Go with your gut instinct/first thought.**

TODAY IS

MONEY IS

MY BIGGEST LIMITATION IS

WORK IS

THE WORLD IS

TOMORROW WILL BE

I NEED

PEOPLE ARE

EVERYTHING COMES FROM

CHARACTER TRAITS

“Our strength grows out of our weaknesses.”
~ Ralph Waldo Emerson

Below you will find **37 fundamental, FOUNDATIONAL qualities** you can identify, strengthen and improve upon in order to help create your enduring success – your ‘ideal future’.

A “5” requires no improvement. Hard to imagine there will be any or many “5s” as we all should recognize room for improvement within all qualities. A “1” requires a lot of improvement and some immediate action. For instance, if you felt “love” was a “1” – you ought to seek immediate counseling, buy a book on relationships, love or gratitude.

Through the process of identifying a weakness; *acknowledging* it and *accepting* it as such, you give life to its opposite which then expands and improves with said attention.

Love: 5 4 3 2 1

Amount of love you feel for life and others.

Resourcefulness: 5 4 3 2 1

How resourceful are you. Think MacGyver. Do you quite or is it, “If there is a will, there is a way.”

Responsibility: 5 4 3 2 1

How often are you blaming others, coworkers, spouse, kids, government, media,, etc

Self-Control / Moderation: 5 4 3 2 1

Too much food, alcohol, sex, work – loss of balance

Awareness: 5 4 3 2 1

You are HERE! Good job, must be okay as you are working on this form! Great job!

Service: 5 4 3 2 1

You serve others constantly by volunteering, at work in your community

Creativity: 5 4 3 2 1

You are creative. You paint, draw, build things often

Courage: 5 4 3 2 1

You are willing to defend a truth for protection, freedom. Life doesn't scare you.

Compassion: 5 4 3 2 1

You help others regularly. You recognize we are all ONE.

Contentment: 5 4 3 2 1

You are grateful daily for the 'gift' of life and you recognize all you really do have.

TEAMwork: 5 4 3 2 1

You work very well with others recognizing that differences is what makes a strong team and that TEAM is an acronym for Together Everyone Achieves More.

Decisiveness: 5 4 3 2 1

You can make efficient, quick decisions once you have the necessary data. You do not take to long to collect all data required.

Dependability: 5 4 3 2 1

People know that when you say you will do something they can count on you 100% of the time

Determination: 5 4 3 2 1

You know you can do it. "Whether you think you can or you can't you are right."

Loyalty: 5 4 3 2 1

You have a track record of sticking through tough times. You aren't considered flighty.

Diligence: 5 4 3 2 1

You are attentive to detail and follow through

Focus: 5 4 3 2 1

You can focus your attention on a goal until completion

Patience: 5 4 3 2 1

You are patient and recognize the world doesn't often operate on your timeline

Persistence: 5 4 3 2 1

You recognize challenges and obstacles as an opportunity to bolster strength and commitment to the task at hand.

Enthusiasm: 5 4 3 2 1

You are very enthusiastic about life, people, places and things!

Fairness: 5 4 3 2 1

You always strive to find the fair, middle-ground

Faith: 5 4 3 2 1

You have faith and steer clear of fear when it comes to life!

Flexibility / Tolerance: 5 4 3 2 1

You understand and greatly appreciate others unique opinions and lifestyles

Forgiveness: 5 4 3 2 1

It is easy to forgive – you forgive often

Hope: 5 4 3 2 1

It is easy to hope and you remain constantly hopeful

Initiative: 5 4 3 2 1

You are known as a go-getter and one who doesn't need to be asked many times. You always take initiative.

Friendliness: 5 4 3 2 1

People think of you as extremely friendly and outgoing

Leadership: 5 4 3 2 1

People regard you as a natural leader not one who is bossy or demands of others but is willingly followed.

Charity: 5 4 3 2 1

You are very charitable and give often to non-profits of your time and money.

Kindness/Gentleness: 5 4 3 2 1

Everyone regards you as extremely kind

Gratitude: 5 4 3 2 1

You are grateful for everything you DO have and each new day and the opportunities each day brings forth

Honesty: 5 4 3 2 1

You are always honest

Humility: 5 4 3 2 1

You are always very humble

Inspired: 5 4 3 2 1

You are inspired by the challenges of a new day and the opportunities

Joyfulness: 5 4 3 2 1

You see joy and beauty in the simple 'mundane' and 'average'

Influence: 5 4 3 2 1

You garner much influence with friends, relatives, coworkers and family

Punctuality; 5 4 3 2 1

You are always on time

That was fun! ;)

Now...

Review and identify your strengths (those qualities that scored the best) and congratulate yourself!

Then, identify your weakest scores select **ONLY two or three** that stand out. For each of these do two things – write out and verbalize the following type of acknowledgment. For instance, “My *influence* is weak, I ***will*** strengthen my *influence*.” Or, “My *love* is weak, I ***will*** strengthen my *love*.” Or, “I am not *charitable* enough, I ***will*** become more *charitable*.”

It is then recommended you track one habit to improve that quality. If it is “love more”. You may setup the habit of “Love more” and track that once a day you will do something loving/kind for someone.

You should also list three individual actions you could take this week (or, today!) that might include journaling or purchasing a book on the topic or enroll in some related class or finding a learning program that can shed some insight on the topic. Weakness to strength.

Remember, you will never be the ***first*** to experience this ‘unique’ problem/challenge. One of the greatest gifts in this world is there may be hundreds of people who’ve not only experienced the identical challenge but have taken the time to share what it is *they did to overcome it!*

FAVORITE ACTIVITIES

My favorite activities include: (list 8 of your favorite activities) reading book, walking on the beach, snow skiing, horseback riding, surfing, etc

_____	_____
_____	_____
_____	_____
_____	_____

If you could do **only one thing tomorrow** (*one day only*) and it could be anything in the world would you choose to do?

_____ (list the first thing that comes to mind)

Approximately how much would that cost? _____

Now, revisit the list of eight items above and put a \$ sign and approximate cost next to each one.

HABITS (Be, Do, Have)

My THREE best habits are _____

My THREE worst habits are _____

Mental Exercises

If you were to be the person TODAY that you would like to be (right now) what HABITS would that person have? ****TIP**** for instance; if I wanted to be a millionaire in the finance industry what habits might I have? My guess would be the HABIT of researching the markets (daily action) a habit of managing my time efficiently. The habit of waking up early to check on markets, etc.

As Zig Ziglar likes to point out, you have to BE before you can DO and DO before you can HAVE. So, using this example, in order to BE the millionaire stockbroker I have to BE the guy who wakes up early and researches the markets and manages my time efficiently. This helps me to DO –the work of a good stockbroker. And, by DOING the things a successful stockbroker does I can then HAVE the rewards a successful stockbroker enjoys. Be. Do. Have.

The application of any knowledge is where the rubber meets the road, where theory slams head-on into reality. To know these powerful truths is one thing; to apply them becomes literally life-altering. As Anthony Robbins once explained, “Knowledge without action is only *potential* power.” And, I’m sure by now you’ve come to recognize that the word “habit” implies *repeated action*.

To comprehend the power of habit and understand its significance is an important first step. But consciously crafting productive and supportive habits is absolutely critical for successful achievement. As we said from the start, it may not be easy, but it does get *easier*, over time.

Before you proceed further, *here’s a bit of a warning*. **As rudimentary as the goal and habit-alignment process appears, please know this it is a practical, proven and effective process.**

I’ve often noticed that the most basic and simple strategies prove to be the most effective and even life—altering. I recommend you take the time to read each step of the goal and habit setup process thoroughly, and then fully set up one goal first, as this will help you to understand the overall process and will aid in the subsequent setup of goals at a later time.

Here’s an email from a user on New Year’s eve, Jim. He was asking for an extension to the **Focus & Discipline** webinar (replay). In my reply I asked if he read the book and / or used the app. Here is his reply:

