



**The Lawyer's Compass  
Values Priority Worksheet**

Enter each row below in sequence and then move left to right. If the item naming the row (below) is MORE important than the item naming the column (across the page), mark the column with a "X". If less important, leave a blank. Total the "X's" for the row. When done, move down to next row and repeat.	1. Friendship	2. Location	3. Enjoyment	4. Loyalty	5. Family	6. Leadership	7. Personal Devel.	8. Security	9. Wisdom	10. Community	11. Wealth	12. Expertise	13. Service	14. Pers. Accomp.	15. Prestige	16. Power	17. Independence	18. Integrity	19. Health	20. Creativity	Total X's This Row	Rank Order of This Row (by number of X's)
1. Friendship																						
2. Location																						
3. Enjoyment																						
4. Loyalty																						
5. Family																						
6. Leadership																						
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8. Security																						
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14. Pers. Accomp.																						
15. Prestige																						
16. Power																						
17. Independence																						
18. Integrity																						
19. Health																						
20. Creativity																						

Enter each row below in sequence and then move left to right. If the item naming the row (below) is MORE important than the item naming the column (across the page), mark the column with a "X". If less important, leave a blank. When you reach the far right side, move down to next row and repeat.



**The Lawyer's Compass  
Time Priority Worksheet**

Enter each row below in sequence and then move left to right. If the item naming the row (below) is MORE important than the item naming the column (across the page), mark the column with a "X". If less important, leave a blank. Total the "X's" for the row. When done, move down to next row and repeat.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	Total X's This Row	Rank Order of This Row (by number of X's)
1	X																					
2		X																				
3			X																			
4				X																		
5					X																	
6						X																
7							X															
8								X														
9									X													
10										X												
11											X											
12												X										
13													X									
14														X								
15															X							
16																X						
17																	X					
18																		X				
19																			X			
20																				X		

Enter each row below in sequence and then move left to right. If the item naming the row (below) is MORE important than the item naming the column (across the page), mark the column with a "X". If less important, leave a blank. When you reach the far right side, move down to next row and repeat.

**Suggestions for Possible Time Priorities in No Particular Order**

**Work Spouse "Playing Hooky" Hobby Volunteer Activities Children Religious/Spiritual Life Friends Fitness/Wellness Parents Personal Finances Professional Development Cleaning Clubs Entertainment Business Development Education Home Repair and Improvement School Support Activities Political Activity Job Search Firm Activities Professional Association Shopping Cooking Errands**



## ***Who Am I? Tool***

### **1. What Are My Values?**

#### **Compass View**

Values are your moral roots. When combined with actions, your values form character. Character, combined with competencies, determines your trustworthiness. Values can be shaped by choice. The analysis here is in addition to the Values Prioritizer which appears as a separate Worksheet below.

#### **Tools and Resources**

[Value Test.com](http://ValueTest.com) [Values Ranking Exercise](#)

[Personal Values Assessment at valuescenter.com](http://PersonalValuesAssessment.at.valuescenter.com)

[Online Values Profile at psychologytoday.com](http://OnlineValuesProfile.at.psychologytoday.com)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **2. What Is My Personality Type?**

#### **Compass View**

Your actions will be strongly influenced by your personality type. The Myers-Briggs Type Indicator is a widely accepted tool for determining your personality type based on four factors: Extraversion/Introversion; Sensing/Intuitive; Thinking/Feeling and Judging/Perceiving. Others tools include the DISC Profile and The Keirsey Temperament Sorter.

#### **Tools and Resources**

[Find an MBTI® Professional](#)

[Online Personality Type Test at onlinepersonalitytests.org](http://onlinepersonalitytests.org)

[Online DISC Profile at discpersonalitytesting.com](http://discpersonalitytesting.com)

[Online Keirsey Temperament Sorter at keirsey.com](http://keirsey.com)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **3. How Trustworthy Am I?**

#### **Compass View**

As technology changes the nature of work by placing more emphasis on **Who You Are** rather than **What You Do**, your ability to be trusted becomes ever more important. Steven M.R. Covey's book, "The Speed of Trust" sets out an excellent overview of trust and a unique self-assessment tool of your current level of trustworthiness.

#### **Tools and Resources**

[Read "The Speed of Trust" by Steven M.R. Covey](#)

[Online Work Integrity Test at testyourself.psychtests.com](http://testyourself.psychtests.com)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **4. What Are My Strengths?**

#### **Compass View**

Your "Strengths" are your natural talents: those things for which you have an innate aptitude. Effort applied to strengths can develop powerful skills. What are your natural gifts? Identifying your strengths and bringing them to bear in your work can improve your effectiveness and fulfillment.

#### **Tools and Resources**

[Determine Your Strengths: Gallup's Strength Finder 2.0 at strengths.gallup.com](https://www.gallup.com/137327/determine-your-strengths.aspx)

[Via Online Strengths Analysis at www.viacharacter.org](http://www.viacharacter.org)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **5. What Are My Interests?**

#### **Compass View**

Your "Interests" are developed from the application of your strengths and talents in a variety of life situations. Taking inventory of your life experiences...tasks that you have enjoyed, settings that have been meaningful, types of people you have enjoyed working with...getting to know yourself in practical terms creates a powerful basis for guiding your future.

#### **Tools and Resources**

[What Color Is Your Parachute Workbook by Richard Bolles](#)

[Calling Card Exercises in "Work Reimagined" by Leider and Shapiro](#)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



***Who Am I? Tool***

**6. What Are My Religious/Spiritual Beliefs?**

**Compass View**

Your religious and spiritual beliefs can become the focal point of your value structure and life.

**Tools and Resources**

[If unsure, you may want to start with The Spiritual System Belief Selector Tool at http://www.selectsmart.com/RELIGION/](http://www.selectsmart.com/RELIGION/)

**Notes, Results, Observations, Insights**

***Add Your Inputs Here:***





## ***Who Am I? Tool***

### **7. What Is My Financial Health?**

#### **Compass View**

Your financial health represents a significant component of who you are at any point in time? Are you burdened by debt? Does your income meet your needs? Do you aspire to greater levels of income? Have you planned for your retirement or the possibility that you may need long-term care? An assessment of your overall financial health will help reveal your relationship with money.

#### **Tools and Resources**

[Compute Your Personal Financial Health Index](#)

[CNN.com Financial Health Tool](#)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **8. What Is My Risk Tolerance?**

#### **Compass View**

Life presents us consistent opportunities to move ourselves forward: a primary use of a compass. Many times those steps forwards involve a move into the unknown and a measure of risk. Your willingness to use your Professional Compass depends in no small part on your ability to accept risk.

#### **Tools and Resources**

[Online Risk Tolerance Exercise at www.queendom.com](http://www.queendom.com)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **9. How Do I Spend My Time?**

#### **Compass View**

How you spend your time is one of the most important measures of who you are, what you value, your interests, and your motivations. There is no more objective test of what is important to you than how you spend time. On another level, time spent measures your effectiveness in maintaining work/life balance.

#### **Tools and Resources**

[Tools to Analyze Your Priorities, Prepare a Time Budget and Prepare A Master Schedule Are Provided as Separate Workseets Below](#)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **10. Is My View of Myself Consistent With How the World Sees Me?**

#### **Compass View**

Many of the tools in The Professional Compass are self-administered. In this step, reaching out to the those around you for input will provide a more independent perspective on your life. The "360 Degree Profile" has proven a useful leadership and personal development tool because it helps validate that your understanding of yourself squares with the experience that others have with you.

#### **Tools and Resources**

[Online 360 Degree Profile Tool at www.selfstir.com](http://www.selfstir.com)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## ***Who Am I? Tool***

### **11. What Is My Calling/Vocation?**

#### **Compass View**

Your Calling/Vocation exists when you undertake activities or work for the benefit of someone other than yourself...to serve a greater societal goal. Is your work a means by which you make a living? Is there a greater goal to your daily efforts? Is there a need in society that your work or activities outside of work can help you fulfill?

#### **Tools and Resources**

["How To Find Your Mission In Life" by Richard Bolles](#)

["The Happy Lawyer: Making a Good Life in the Law"](#)

[Finding Your Vocation Exercises at www.zurinstitute.com](http://www.zurinstitute.com)

["A Life of Excellence" by Richard E. Simmons, III](#)

["Halftime: Moving from Success to Significance" by Bob Buford](#)

#### **Notes, Results, Observations, Insights**

***Add Your Inputs Here:***



## Contentment Assessment

		Contentment				
		Satisfaction			Calling/Vocation	
		Happiness	Fulfillment	Excellence	Meaning in Work	Meaningful Work
Setting 1:						
Setting 2:						
Setting 3:						
Setting 4:						
Setting 5:						
Setting 6:						
Setting 7:						
Setting 8:						
Setting 9:						
Setting 10:						

In this worksheet, evaluate each of the settings from the "Where Am I?" Tool by marking each box "Yes" or "No" to reflect whether the setting generates/allows/contributes to **Happiness, Fulfillment, and Excellence** with respect to **Satisfaction** and whether the setting reflects Meaningful Work or Meaning In Work with respect to **Contentment**.



## Change Analysis

### Technology Competencies

**My Ability with:**

- e-mail
- Word Processing
- Excel
- PowerPoint
- Computer-based Practice Management
- Voice Recognition Software

Max Score	My Score
10	
10	
10	
10	
5	
5	

**My Level of Participation In:**

- Social Media
- Website Design and Marketing
- On-Line Lawyer Evaluation

5	
10	
5	

**My Implementation of:**

- Technological Trends in My Practice Area
- Enhancements to My Specific Practice

10	
20	

**Totals**

100	
-----	--

My Technological Competency Overall

*Poor/Good/Average/Very Good/Excellent*

**Notes on Technology Competencies and Implementation**



## Change Analysis

### Professional Competencies

I Maintain an Ongoing Career Development Plan

**Yes**

**No**

### Notes on My Career Development Plan and Objectives





## Change Analysis

### Trustworthiness Competencies

***I am an active implementer of:***

Maister Trusted Advisor Trust Formation Process	<b>Yes</b>	<b>No</b>
Covey's Speed of Trust List of Trust Building Behaviors	<b>Yes</b>	<b>No</b>
Trusted Advisor Handbook Skills	<b>Yes</b>	<b>No</b>
Professional Compass Managing Client Expectations Process	<b>Yes</b>	<b>No</b>
Power of A Positive No Skills and Approaches	<b>Yes</b>	<b>No</b>

### Notes on Implementation of Trustworthiness Competencies



## Change Analysis

### Congruence Inventory

	<b>Max Score</b>	<b>My Score</b>
<b>My Overall "Where Am I" Total Score Divided by 100</b>	100	
<b>My Sense of Financial Integration</b>		
Current Spending	20	
Emergency Funding	10	
Retirement Planning	10	
<b>My Overall Sense of Satisfaction/Contentment</b>	20	
<b>My Sense that My Values Match:</b>		
Values That Support Trust Building	10	
Values Match Those Underlying the MRPC	10	
Values Support Happiness/Fulfillment/Excellence	10	
Values Are Consistent with My Religious/Spiritual Beliefs	10	
<b>Totals</b>	<b>200</b>	

**Notes on My Congruence Inventory**



## Change Analysis

### Willingness/Ability to Change

<b>Does My Risk Tolerance Reduce My Ability/Willingness to Change?</b>	<b>Yes</b>	<b>No</b>
<b>When I Picture Change Do I Face an Alternate Fear?</b>	<b>Yes</b>	<b>No</b>
<b>Do I Believe In Change-Impeding Straw Men?</b>		
My Current Environment is Only One That Works for Me	<b>Yes</b>	<b>No</b>
These Strategies Will Not Work In My Environment	<b>Yes</b>	<b>No</b>
I Must Have Financial Independence Before I Can Change	<b>Yes</b>	<b>No</b>
It is Impossible to Change My Values or Approach	<b>Yes</b>	<b>No</b>
<b>Do I Need to Change My Values?</b>	<b>Yes</b>	<b>No</b>
<b>Are There Other Things in My Life that I Need to Change?</b>	<b>Yes</b>	<b>No</b>

### Notes Overcoming Obstacles to Change



## Call to Action

**What, Then, In My Life Requires Change?**



The Lawyer's Compass™  
*A Tool For Continuing Orientation In Life and Work*

**SMART Goals**

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>



The Lawyer's Compass™  
*A Tool For Continuing Orientation In Life and Work*

## SMART Goals

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>



The Lawyer's Compass™  
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## SMART Goals

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>

<b>Goal:</b>									
Specific	<input type="checkbox"/>	Measurable	<input type="checkbox"/>	Acheivable	<input type="checkbox"/>	Realistic	<input type="checkbox"/>	Time Oriented	<input type="checkbox"/>



## Accessing Resources

### How Would I Involve Others?

#### Family

Notes

#### Friends

Notes

#### Partners

Notes





## Accessing Resources

### Subordinates

Notes

### Staff

Notes

### Mentors

Notes



## Accessing Resources

### Professional Coach

Notes

### Counselor

Notes

### Pastor/Spiritual Director or Advisor/Other Guide

Notes



## Accessing Resources

### Accountant

Notes

### Financial Planner

Notes

### Investment Advisor

Notes



## Accessing Resources

### Technology Advisor

Notes

### Other

Notes

### Other

Notes



## Accessing Resources

### How Would I Utilize Outside Resources?

#### Bar Association Resources

Notes

#### Books and Reference Materials

Notes

#### Continuing Education Resources

Notes



## Accessing Resources

### Vocational and Other Training Resources

Notes

### Business School/Executive Leadership Resources

Notes

### Online Financial Analysis Tools

Notes



## Accessing Resources

### Computer Software

Notes

### Retirement Planning Tools

Notes

### Other

Notes

**The Lawyer's Compass™ Time Budget Worksheet**

	<b>Hours</b>
Number of Hours in a Week	168
Less: Hours Allocated To Sleep/Rest	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Work Time	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 1: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 2: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 3: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 4: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 5: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 6: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 7: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 8: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 9: _____	<input type="text"/>
<i>Hours Remaining</i>	
Less: Hours Allocated to Personal Priority 10: _____	<input type="text"/>
Balance of Unallocated Time	<hr/> <hr/>

<b>Weekly Time Budget</b>					
		Budget	Actual	Actual	Actual
Sleep/Rest					
Work					
Personal Priority 1:					
Personal Priority 2: _____					
Personal Priority 3: _____					
Personal Priority 4: _____					
Personal Priority 5: _____					
Personal Priority 6: _____					
Personal Priority 7: _____					
Personal Priority 8: _____					
Personal Priority 9: _____					
Personal Priority 10: _____					
Unallocated: _____					
Total:					



**The Lawyer's Compass Master Schedule**

		<i>Monday</i>	<i>Tuesday</i>	<i>Wednesday</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
<b>6</b>	:00 a.m.							
	:30 a.m.							
<b>7</b>	:00 a.m.							
	:30 a.m.							
<b>8</b>	:00 a.m.							
	:30 a.m.							
<b>9</b>	:00 a.m.							
	:30 a.m.							
<b>10</b>	:00 a.m.							
	:30 a.m.							
<b>11</b>	:00 a.m.							
	:30 a.m.							
<b>12</b>	:00 p.m.							
	:30 p.m.							
<b>1</b>	:00 p.m.							
	:30 p.m.							
<b>2</b>	:00 p.m.							
	:30 p.m.							
<b>3</b>	:00 p.m.							
	:30 p.m.							
<b>4</b>	:00 p.m.							
	:30 p.m.							
<b>5</b>	:00 p.m.							
	:30 p.m.							
<b>6</b>	:00 p.m.							
	:30 p.m.							
<b>7</b>	:00 p.m.							
	:30 p.m.							
<b>8</b>	:00 p.m.							
	:30 p.m.							
<b>9</b>	:00 p.m.							
	:30 p.m.							
<b>10</b>	:00 p.m.							
	:30 p.m.							
<b>11</b>	:00 p.m.							
	:30 p.m.							
<b>12</b>	:00 a.m.							
	:00 a.m.							
<b>1</b>	:00 a.m.							
	:00 a.m.							
<b>2</b>	:00 a.m.							
	:00 a.m.							
<b>3</b>	:00 a.m.							
	:00 a.m.							
<b>4</b>	:00 a.m.							
	:00 a.m.							
<b>5</b>	:00 a.m.							
	:00 a.m.							