

THE WHEEL OF LIFE TREE PLAYBOOK™ AND LIFE AUDIT

a creative toolkit for career and life planning



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The Wheel Of Life Tree Playbook™ and Life Audit

Welcome

- **Would you like to live a more satisfying life?**
- **What would it be like to do more of the things you really enjoy, those activities that bring a smile to your face?**
- **Would you like to be motivated so you're enjoying more of your days and doing more of what you love?**
- **Would you like to invest your time in a simple and creative tool that will help you evaluate and organise your life and work in eight easy steps?**

Then this handy e-book will help you achieve all of the above and more.

The Wheel Of Life Tree Playbook is a life audit tool of simple, straightforward, 'no-nonsense' activities that will help you creatively review your life and career and decide on the small changes you wish to make.

The Wheel Of Life Tree Playbook will guide you through a series of eight steps. You can follow the steps in one day or in one sitting, but you'll gain far better results if you spread your time over a series of days and even weeks.

Even with a busy schedule, this audit is quick, engaging and easy to follow. In a matter of minutes, you'll do a 360° life or career review and have the evidence for how well your life or career is or isn't operating. From here, you can look back and review what worked and what didn't. Then you can logically and creatively plan and work out the actions that will help you easily achieve your goals.

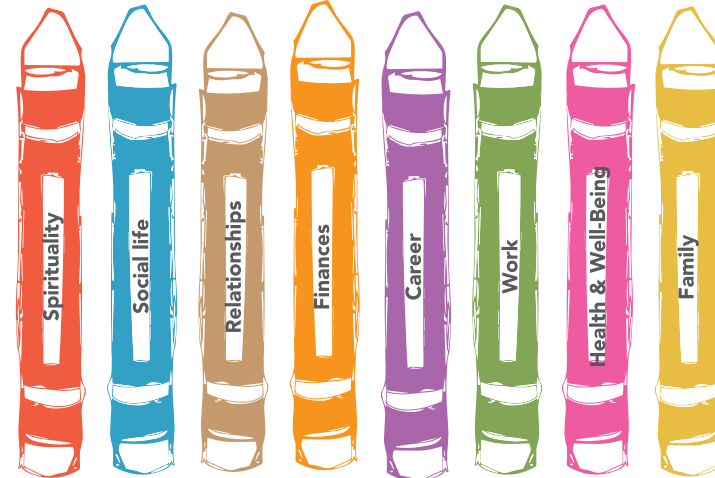


How to get the most out of your Wheel Of Life Tree Playbook and Life Audit

Before you start you'll need to:

- **Print out the playbook beforehand**
- **Find yourself a quiet space with as little distraction as possible (but it's fine to work through the playbook in small groups)**
- **Set aside at least 30 minutes for each leaf level stage**
- **Pull together a creative kit of colouring pencils, crayons, felt tips and a pen**
- **Have a blank notebook where you'll capture any extra additional notes, thoughts and ideas**
- **Get an unused envelope for an activity in leaf level 6**

As the title suggests, this is part workbook and part playbook and you'll be encouraged to be as playful as you can with the different leaf levels. The times given for completing each section are estimates. Everyone will work at their own pace. Sometimes you'll complete a section quickly, other times you'll become so absorbed that you'll lose track of time. It's all fine. Just trust the process and go with the flow.



The Wheel Of Life Tree Playbook™ and Life Audit

What we learn from trees

The playbook uses the image of a tree as a metaphor, a reminder of what we can learn from trees and what can be gained from taking the time to review our own lives on a regular basis.

There are times when our lives and work flourish. Times when we are aligned and balanced with strong foundations in place that ensure we are anchored and not blown off course when a storm or crisis threatens our lives.

It becomes easier to know what to do to bring about changes in our lives when we understand the seasonal cycles of change and how they may be mirrored in our own lives.

For example, say your job is under threat, an ongoing contract you've relied on is being pulled or perhaps a relationship breaks down. Or perhaps your intuition recognises that a

current crisis or challenge may be signalling that it's time to retreat, to go inwards and hibernate while you regroup and strengthen, all the while rebuilding your resilience and staying power. It's comforting to know that in the same way a tree knows that shedding leaves is a necessary part of the cycle of renewal and new growth, the same is true in our life.

With this in mind, print off several blank copies of the Wheel Of Life Tree Audit on page 7 so you can undertake new audits several times throughout the year.

Completing the Wheel Of Life Tree Playbook and Life Audit will guide you to identify the main priority areas of your life that you'll need to focus on and provide you with a reflective and creative space to set about making those changes. So, let's turn the page as you begin the journey to turn over a new leaf.



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



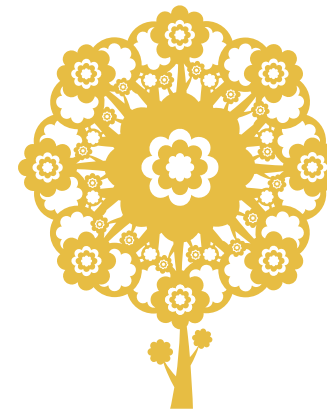
So let's begin. The first step is to identify the main areas of your life that you'll be auditing.

These should be significant and important areas of your life that impact on how effective you are and how you feel overall about your life or your work. The key areas people often come up with include the following categories on the list below:



These are just suggestions. Take a few minutes to decide what your main eight categories will be. One tip that might help is that your eight categories will significantly contribute and impact on your ability to have and maintain a great life/career/job when they're working well.

Do feel free to generate your own list (there are more suggestions on the next page). Feel free to make your categories more specific or related to work, business or relationships. The number for each area corresponds to the same number located on the actual Wheel of Life Tree Audit. Once you have decided on your areas, record them on the list below the tree.



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Your next step will be to review just how well each area is currently operating using a rating of 1-5.

Weight	Friendships	Health & Well-Being	Nutrition	Religion
Time Management	Spirituality	Personal Style	Becoming Better Organised	Personal Growth & Development
Money & Finances	Exercise	Home Environment	Holidays	Coaching & Mentoring
Work Relationships	Career Satisfaction	Spending Time In Nature	Career or Business	Writing
Networking	Self-Care	Creativity	Social Media Presence	Motivation

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



fulfilled

Date:



incomplete

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



Make a note of the rating for each area in the following boxes and then decide on what three areas you will begin to work on:

Life Work Theme	Rating
1. _____	
2. _____	
3. _____	
4. _____	
5. _____	
6. _____	
7. _____	
8. _____	

fulfilled

Date:



incomplete



1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Review, Review, Review

You've identified your key areas, so now it's time to carry out your review. You'll need to have your collection of coloured pens to hand before we get going.

I created the Wheel Of Life Tree Audit in 2009 as a tool for my book *Be Your Own Best Life Coach* (www.amazon.co.uk) because I wanted an audit that would be playful yet engaging to complete. Feedback has included comments on how refreshing it is to complete an audit that is creative, involves colouring and many people love the idea that it is represented in the form of a tree.

So you've decided on your eight areas and listed them beneath your tree. Each wheel on the tree contains five rings and is based on a rating of 1-5. Beginning at the centre ring and working outward, every ring that is coloured in reflects an increased level of satisfaction with that area of your life.



- **The centre ring represents a rating of 1 which, when coloured in, indicates that this area is not functioning well.**
- **Two rings shaded in reflects some levels of satisfaction, but indicates that there is room for improvement.**
- **Three rings shaded indicates good working order, but with a few tweaks here and there it could be even better.**
- **All five rings shaded means you're happy and satisfied with how this area of your life or work is operating.**

Working through your list, rate each wheel on a scale of 1-5 by colouring in the number of rings assigned to that specific life or career area. Feel free to use different colours or the same colour if you prefer.

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Colouring in this way is not only creative but gives the more logical side of the brain time to rest, while creating an inroad for the creative, right side of the mind to kick in. It moves you into a more relaxed thinking space, creating room for the mind to free associate and make connections we would otherwise miss in our normal, busy routines.

Colouring in your rings is also a way of introducing play into the process. Give yourself permission for a few minutes in your day to turn down the volume on those things or areas in your life that require a serious frame of mind, and instead give over your time and focus to having a little fun engaging in an activity many of us loved to do as children.

As you engage in the process of colouring, relax and notice your thoughts and feelings about the areas you're reviewing. You'll find it helpful to have your notebook open to capture any thoughts or observations that come to mind as you complete your audit.

We rarely make quality time to take stock of what's really going on in our lives. So, well done for completing Leaf Level 2. Now it's time to move to Leaf Level 3.



Date: fulfilled



incomplete

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Reflecting on your tree may take a few minutes. During this time ask yourself the following questions to explore what your tree may symbolise about your life right now:

- **How balanced or unbalanced does it look from where you are now?**

- **Does your tree look healthy and full of colour or is it patchy and bare?**

- **Is this the kind of tree you would take refuge under or is it one you would barely glance at?**

- **Make a note of your first impressions of your tree. How do you feel about what is being mirrored back? What does it tell you about your life or your work right now?**

- **What has surprised you about your audit?**

- **Where do you feel energised?**

- **What areas of your audit feel flat or would benefit from more growth?**

- The key here is honesty. Without it, your goals will lack substance and backbone. The more honest you are, the better decisions you will make about your future and any changes you wish to make. You might find from your writing inquiry that some areas are doing really well, which has resulted in other areas being neglected. You don't need to have a perfect balance but self-observation and awareness are often the first steps in making a change.



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level

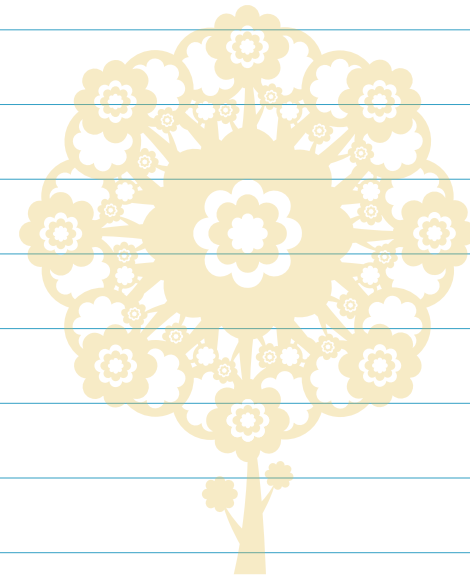
3

Trees go through different seasons and this is good to remember. So for some of you, your tree may be in its autumn – a time when your life or work will be shedding, signalling a season of hibernation as you build and consolidate from underground. For others, your tree will reflect a flurry of activity with lots of colour as you pass through a season of flow with many opportunities coming to fruition. Wherever you are is perfect. No need to judge. Instead sense and connect with where you need to go to next.

To complete your audit, select a blank page in your notebook or use the list below. List the reasons behind your rating for each area. For example, what makes a particular area a 2 instead of a 1? It's always good to notice what's already working and what might be contributing to that particular area working well. Then when you have listed all the reasons, move on to the next step.

List the reasons behind your rating for each area

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



List Your Three Life/Career.... Areas To Work On Now Here

1

2

3



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Writing Inquiry

Congratulations on completing Leaf Level 3. It required a lot more thinking and writing, so well done for staying with it. As a result of your work on Leaf Level 3 you should now have a clearer picture of:

- **The three areas you'd like to change and improve**

To make sure you've made the right choices, you're now going to work through a similar process as in Leaf Level 3. You'll take some more time to reflect and respond to some additional questions, which will further reinforce your intentions and commitment to progressing your chosen areas. The questions have been selected to help you visualise what you want from each area and what each category would look like when working at its best.

You'll begin with a creative exercise, which will make this leaf level highly interactive. It will require you to create questions on individual slips of paper.

Shortly you'll get a chance to either write out each of the questions on page 16 on individual slips of paper using your coloured pens or crayons and then pop them into an envelope or place them in a tin or box. If you don't feel up to this, use the photocopy sheet with the questions on page 16.

Next, find somewhere quiet to sit.



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Working with number one on your list of three areas to work on, randomly select one of the questions from your envelope or container and pose the question to that particular work or life area.

Let's say you want to improve your career chances at work and you select the question:

'What would you be doing differently if you were operating one of two more points higher up the scale from where you are now?'

Write about what your career might look like if you were two points further along the scale from where you are now. Or you might write about what you would be doing to move you two points further along the scale.

These are not questions set in stone but questions you can mould to your particular goals and aspirations. It's okay to go with your first thoughts even if they don't make sense, and if you have time, you could pose the questions a few times and see what different responses come up.

Work through as many of the questions as you can for each of the three areas.

There's no pressure here to come up with the right answers. Just be open to whatever emerges.

If the weather is good, why not energise this activity by sitting outside under or near a tree or in nature. If working inside, you can sit near a window. You might want to play some background music or even organise scents or fragrances, which help you to relax and unwind.

Before you begin, take a few deep breaths and make sure you have some water to drink. Don't forget your coloured pens and writing kit.





What would this area of your life or work look and feel like if it were operating at a level 5?

Think about how you might feel

What and how would your environment be different to how it is now?

Try to include as many of the senses (what would you see, what would you be hearing, sensing etc) when visualising this area operating at a level 5?

What would be the real benefit to you of improving this area of your life or work?

What would be the benefit to others if you were to improve this particular life or work area?

What would you be doing differently if you were operating one of two more points higher up the scale from where you are now?

What other questions would be good to ask yourself at this stage? Trust your own inner wisdom and have faith in what comes

What are these questions revealing to you?

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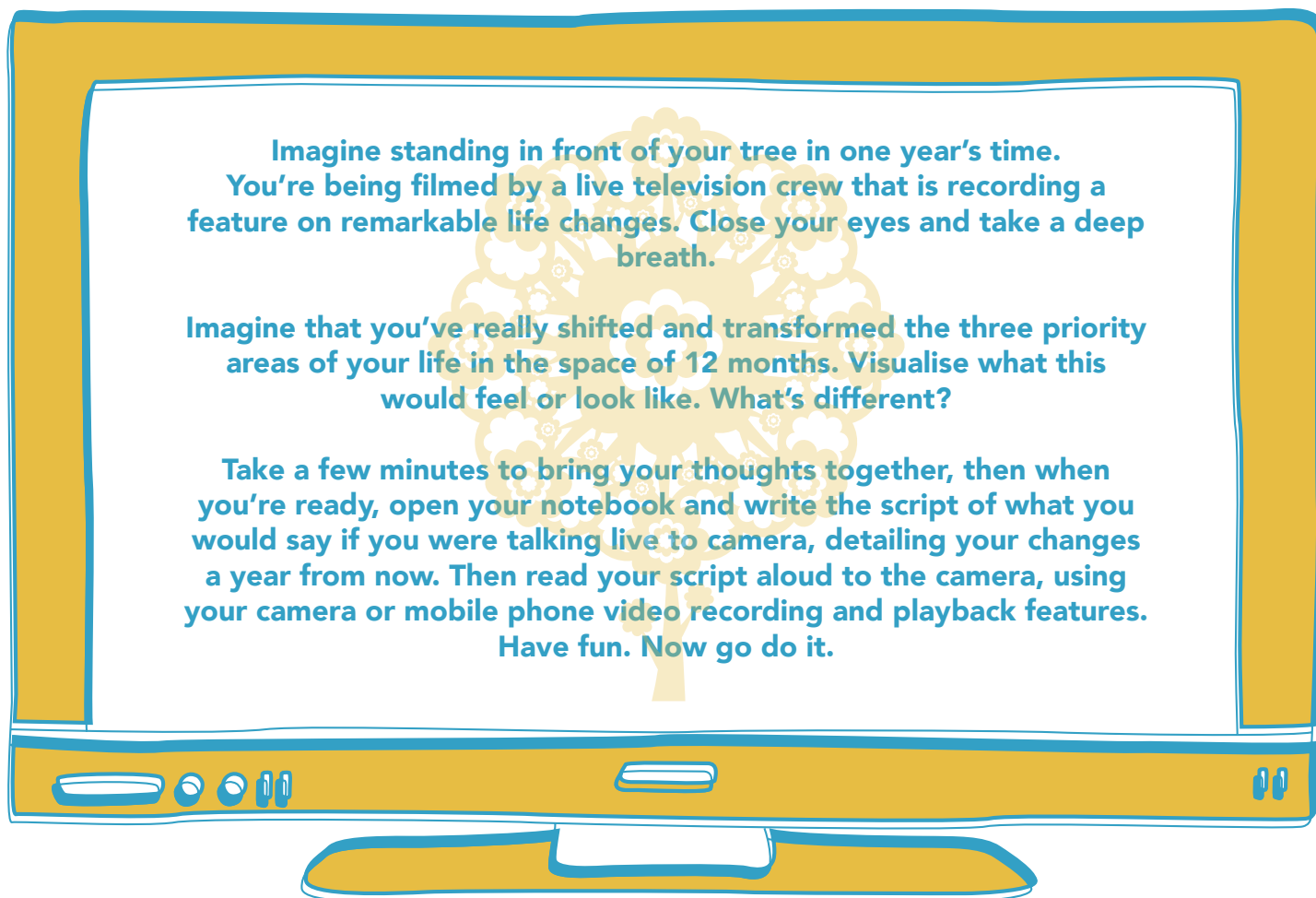
Leaf Level



This level is often the turning point in your audit. Even though at the next leaf level you're guided to break your goal down into small steps, Leaf Level 4 can be the point in the process where your perception and attitude shifts, and you transform how you think about the possibilities that you could make happen.

Before you finish with this leaf level, here's one more activity to play with.

I hope you'll play at this leaf level. When you do, you open up to the possibility of miracles, magic and movement that goes beyond the rational and the expected. Have fun!



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Evaluate and Reflect

I love this leaf level as I have used it repeatedly in my own life for a number of years and it never ceases to amaze me. In order to easily and effortlessly achieve your intentions and goals, it's important to clear a space. By this, I mean both physical and psychological space.

Physical clutter and emotional baggage are two common ways you can deplete your energy and motivation for taking action and making things happen.

Coaching clients are often surprised when this step is introduced before they focus on deciding the course of actions that will help them achieve their goals. But when we avoid this leaf level – the work of clearing out the stuff that gets in the way, the mental stuff that consciously and unconsciously sabotages your success – then many of our goals will be shortlived or not achieved at all.

Everything around you is energy and when your energy or space is blocked on a physical level, it can also have an impact on your emotional and mental states.

How often have you cleared a space in your home or your desk and felt instantly better afterwards? Often you'll find yourself feeling lighter, you notice you have more energy and suddenly you're feeling more positive and confident. That was because you cleared a space. And when you clear a space, it's like opening a door so something new can enter, whether it's something you want to achieve or something that will add value to your life or work.

Before you move onto the next leaf level, your next task is to clear a space. There are a number of ways you can begin.

Clearing can be carried out in your physical space – clearing your desk, a drawer, a room, your closet or a cupboard. Or it might be letting go of a piece of furniture or clearing a corner that changes energetically how a space feels.



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Leaf Level

5

You can also clear your relationships. This might mean ending a friendship that's no longer healthy or a business partnership you know has run its course. Sometimes it's a job you may have outgrown and in many cases, difficult though it might be, it's an intimate relationship. You can hold on hoping and praying that things will change, but the moment you open yourself up to new and much better things, opportunities and people come flooding into your life.

Other options might include saying 'No' to requests, invitations and obligations that you're not really interested in, but feel obliged to say yes to. Make a list of what these are and start saying no more often. As you do this, think about what you can say yes to instead – just by saying no more often.

By clearing in this way you'll be making sure you have the energy you need both physically and emotionally to focus on the actions that will move you forward and you'll lessen the possibility of being distracted or drained by things and people who take you off course.

Just so you recognise the value and importance of the work required, here are some reminders of why clearing a space works:



- **It's a quick and easy way to raise your energy levels and change your mindset**
- **When you're physically clearing a space, you'll often free associate ideas and solutions for putting other things in order while you work**
- **Creating order in your physical space often has a mirror effect by creating order in your thinking**
- **It's a great way of freeing up the mind (the logical rational mind has something else to focus on) so you can get on with being creative and resourceful**
- **You unblock and thereby increase your energy levels**
- **You find clarity about what's important and what really matters**
- **You will have less to worry about and more time to focus on your goals and aspirations**

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Make a note in the space below of the spaces you're ready to clear.

A large rectangular area defined by a dotted orange border, intended for taking notes.

Once you've cleared at least one space, you're ready to move on to Leaf Level 6.

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Small Is The New Big!

Many of your everyday life and work successes happen when they're broken down into small, achievable steps. By breaking your goals down, you're increasing the possibility of achieving your goals. By turning them into small manageable steps you make it easier to take action and to stay motivated when your small steps are achieved. So make sure that your first three steps are not onerous, like: 'Start writing my book on Friday...' or 'Write first chapter for forty minutes tomorrow.' It's far better to start with:

- 1. Purchase or find a blank notebook or journal.**
- 2. Take five minutes and brainstorm a list of topics and themes to write about.**
- 3. Free write for five minutes.**

Ask yourself which of the three is more appealing? The idea is not to end up with vague actions. Make sure your steps are specific and concrete, and small enough to activate ideally within a 5-7 minute time frame.

Your next actions will be to identify the small steps for each of your three main areas.

One way to do this is to work backwards from your desired result to the starting point of what would move you forward from where you are right now. It's those first three small steps you'd need to make to start the ball rolling. Your steps can be really tiny, such as writing a list, making a phone call or doing a Google search for information.

The idea behind your first small steps is that they'll be tiny enough to mobilise you into action with the least resistance. Use the questions below to help you decide on those first small steps and then record the steps in the space on the following page.

- What's the first small step you could take to initiate your moving closer towards your desired goal?**
- What's next?**
- What would follow this step?**
- What small step could you do now?**

The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



One way to check the potency of your small steps is to ensure that your first step can be activated within the next 24 hours. You'll want to make sure that you're motivated to get going.

By taking small steps, you'll be the acorn that gradually and then suddenly manifests into something much bigger than

where it started out. Think of each small action as you moving your project or goal closer to completion.

Don't underestimate the science of small steps. Make a list of three small steps for your priority areas and record your actions in the space below.



Goal:
3 Small Action Steps

1. _____

2. _____

3. _____

Goal:
3 Small Action Steps

1. _____

2. _____

3. _____

Goal:
3 Small Action Steps

1. _____

2. _____

3. _____



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



What's Your Motivation Method?

One of the ways you will stay on track is by ensuring you have the right structures in place that will keep you motivated and engaged. We're all motivated in different ways and it's good to know what motivation method works for you.

Here are some examples of ways in which you might give yourself a motivation pick-me-up:

- **Give yourself a deadline or a timeline to get a project or particular area of your audit complete**
- **Tell someone what you are doing and ask them to keep you accountable**
- **Set yourself a challenge around your goals and set up a system to monitor your progress**
- **Post what you are doing online or tell a close or trusted friend or colleague**
- **Give yourself small treats and rewards as you achieve steps along the way**

What other ideas do you have for staying motivated?

One of the ideal ways we can stay motivated is to be motivated by the satisfaction we gain from doing the work. We can, of course, be motivated by incentives, but a bigger incentive could be valuing and deeply appreciating the work we do as a reward in itself.

Here are some additional ideas to keep you going:

Book in a session with one of your book mentors. These are books you know you can go to when you need inspiration or a pick-me-up.

Here are a few of my tried and tested book mentors:

- **The Artist's Way by Julia Cameron**
- **The Sound Of Paper by Julia Cameron**
- **The Writer's Book Of Days by Judy Reeves**
- **One Continuous Mistake by Gail Sher**
- **Writing Begins With The Breath by Laraine Herring**
- **Leaving A Trace: On Keeping A Journal by Alexandra Johnson**

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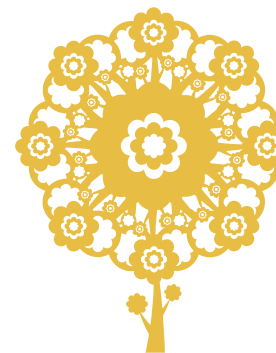
Leaf Level



- **Make a list of places in nature you can visit locally that replenish your energy or make you feel calm**
- **Make a list of music tracks that improve your mood and make you feel good**
- **Identify people in your life you can call up or visit on the off chance and who instantly lift your spirits**
- **Write a list of healthy snacks and foods you can reward yourself with**
- **Wear an item of clothing or a colour that makes you feel and look good**

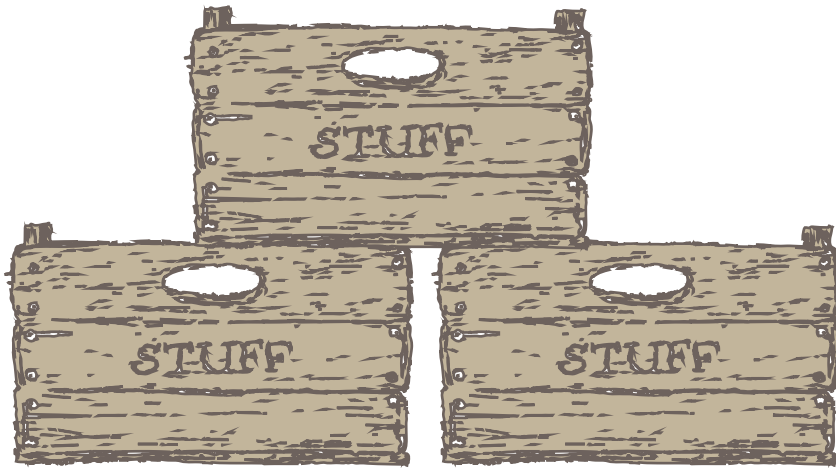
Treats are not just about what you get but what you give. So get your motivation high by:

- **Writing out a couple of thank you cards**
- **Write down three things that made you either smile, laugh or experience a moment of happiness in your day**
- **Review your week and answer the question: What have I learnt from reading, listening, observing or from other people?**



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Leaf Level



It may seem slightly out of sync leaving this leaf level to last but it is deliberate. If my plan works, you will already have activated your three small steps and naturally generated the momentum to move onto implementing the next three steps with relative ease and grace.

But we can't always control what life sends our way and stuff will happen that will get in the way of your success and progress. There's no one who knows you better than you do. So bearing this in mind make a list of all the things that could possibly get in the way of your success and progress. Your list might include things like too many demands on your time, tiredness, a lack of energy or a lack of self-confidence.

1. _____
2. _____
3. _____
4. _____
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6. _____
7. _____
8. _____
9. _____
10. _____

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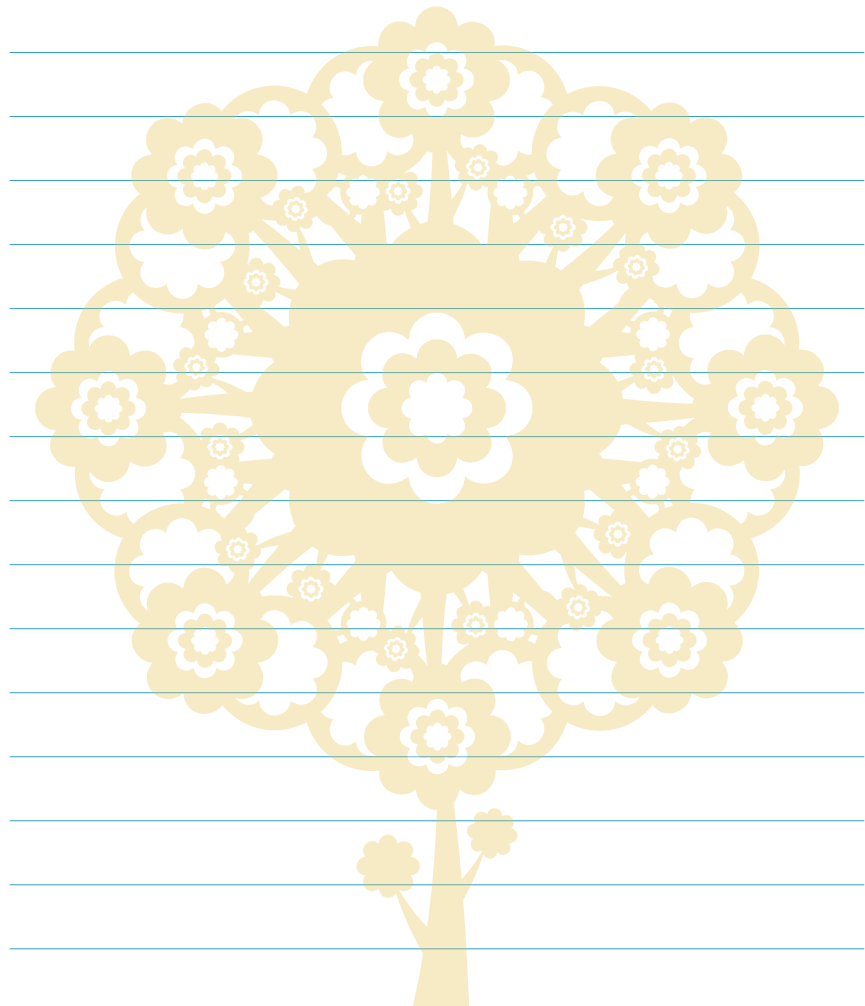
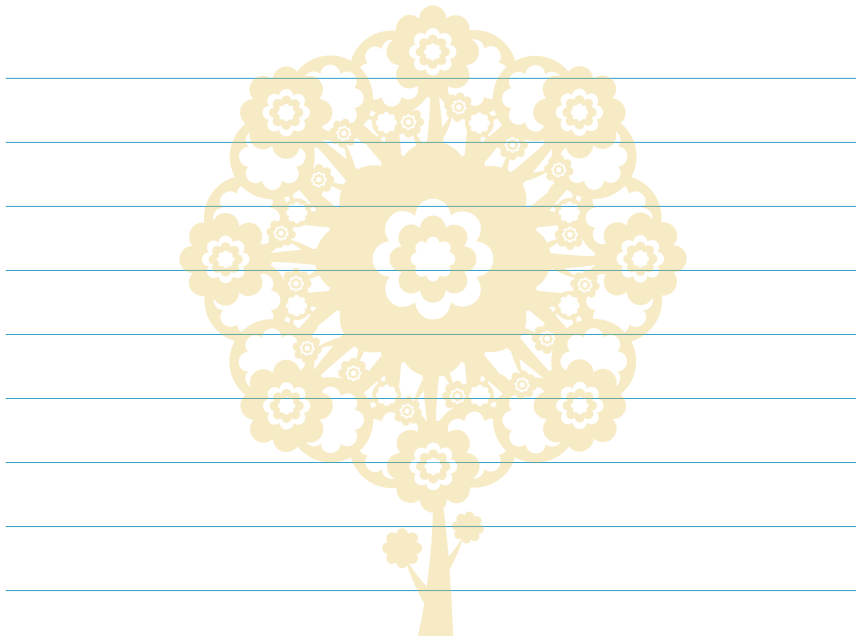
Leaf Level



Now decide on a couple of things you could do that would reduce the impact of your blocks or means of self sabotage even in a small, tiny way.

Now think of another action from your list you would like to stop doing or reduce altogether over the next few weeks. These new actions will contribute towards you supporting and achieving your goals.

Things I can do to move forward my goals?



The Wheel Of Life Tree Playbook™ and Life Audit

Leaf Level



Don't forget, taking small steps can lead to you achieving bigger and better outcomes and results – especially when it comes to the things you want to do less of or eliminate.

What gets in the way?	What can I reduce or eliminate?	New action or behaviour

The Wheel Of Life Tree Playbook™ and Life Audit

Closing words

Well done for getting to the end of the Wheel Of Life Tree Playbook and Life Audit. Like the journey of the acorn, some of the results of your actions will not take root immediately, some will blossom quickly and others will be like compost, mulching away, slowly gaining momentum until it is time to give birth. Knowing this, as well as the nature of how your outcomes will take shape, will help you navigate and stay on course.

This is not a one-off exercise and I'd invite you to complete your Wheel Of Life Tree Playbook on a monthly, bi-monthly, quarterly or twice yearly basis. The idea is that you carry out regular audits knowing that life is always shifting and changing.

Print off blank copies of the Wheel Of Life Tree Playbook and Life Audit (there's an extra blank copy for you on page 7).

Looking back over your audits can be motivating and encouraging. It can break the habit of overlooking your progress and accomplishments and focusing your energies on what has not yet been achieved while missing out on what has.

Coaching clients have reported back how surprised they have been at how things in their lives or work mysteriously changed for the better once they'd completed the audit.

I have used the Wheel Of Life Tree audit regularly since I designed it in 2009 and have achieved a number of goals and life plans,

including getting my third book published, going on retreat to Hawaii and planning a big 50th birthday celebration party.

The key to change lies in the attention and time you give your life along with the acknowledgement that once you show up other forces far greater, bigger and in a way far more resourceful get to work on your behalf.

A tree needs both the sun and the rain to grow. Our lives need us to regularly review, prune back, plant, shed and grow new ideas in order to make things happen.

I hope you enjoy the creative and real possibilities this audit offers you. Let us know how you get on. We'd love to hear from you.

Happy Auditing.

Warm wishes

A handwritten signature in black ink that reads "Jackee." The signature is fluid and cursive, with a long horizontal stroke at the end.

Jackee Holder and the team at Life Work In Progress

About Jackee



Jackee Holder is a transformational coach, coach trainer and coach supervisor. She is the author of three books, *49 Ways To Write Yourself Well* (Step Beach Press, 2013), *Be Your Own Best Life Coach* (Infinite Ideas, 2009) and *Soul Purpose* (Piatkus Books, 1999). Jackee helps and inspires others to connect to their creativity and authenticity through coaching, writing, training and her love of trees and nature. As a passionate lover of books you can read more about her loves and likes and what she gets up to on her blogs at:

www.jackeeholder.com Twitter: @jackeeholder or LinkedIn: JackeeHolder

Other products available from www.jackeeholder.com

Journal Journey <http://ow.ly/vJND4>

Be-Leafs Tree <http://ow.ly/s68c9>

Writing Manifesto <http://ow.ly/h3PMJ>

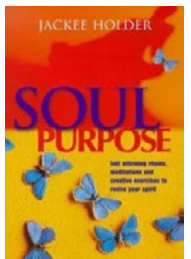
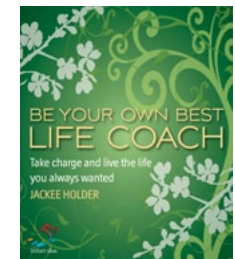
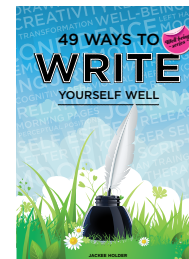
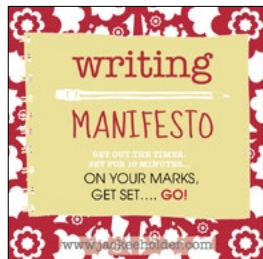
Creativity Manifesto <http://ow.ly/grCKJ>

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