



Your Big Picture Helicopter View Worksheet

This worksheet gives you a Helicopter View of your ideal business and life outside work. I use it myself, and my clients find that it clarifies their goals and makes it easier to see their longer-term vision. They refer to it often throughout the year. It's brief, and gives you a snapshot of your current situation and goals. Think about both your personal and professional goals and how you want you achieve them. Ask yourself how LinkedIn and social media can help you.

Write notes down about each area in this worksheet. You don't need to write extensive, "perfect" notes – these are starting points. Step back from "real life" with all its details for a few minutes, and imagine that you're in a helicopter 50,000' above your business and your life. What do you see?

1. **Your current work situation** – Describe your business and the work you do. Include your colleagues or team members, work environment, responsibilities, pressures, and the potential for promotion and salary increases. For your business, describe your clients, your best or "Ideal" clients, revenue, income vs. expenses, goals, how it's grown over the last 1-2 years, changes you'd make, and things you've learned. Also think about how you want your Ideal business and life to be in 1-3 years.

2. **Your current life** – Describe your time, priorities, values, accomplishments, changes you'd make, things you've learned. What do you want it to be like in 1-3 years?



3. **Your future career or business** – Describe how you see your business 3 years from now. 1 year from now? 6 months? Who do you work with? What position do you hold? Who are colleagues outside work? Who are your clients? Where do you work?

4. **Your future life** – Describe how you see your life 3 years from now. 1 year from now. In 6 months. Where are you? What are you doing? Who are you with? Who do you see? Where do you live? Travel?

5. **What's holding you back or keeping you from reaching your goals and your Ideal Life?**

NOTES & QUESTIONS: