

Personal Holiday Assessment



Your guide to setting the right holiday season priorities
for you, your family and your business

GOALS:

- *Big, major idea goals*
- *Be specific – not: list, instead: create 100 new listings*
- *3 **or less** main goals*
- *Then break down those main goals into specific tasks for each month*

Main Q4 Business Goals:

1. _____
2. _____
3. _____

Main Personal Holiday Goals:

1. _____
2. _____
3. _____

^^^ ^^ ^^

- *What do you need to do each month to further each of your main goals?*
- *Be specific!*
- *Keep it simple -- Don't "pile on" too many tasks*

September:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

October:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

November:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

December:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

Business Assessment

- *Focusing on the right tasks in Q4 is essential to being productive and profitable*
- *How important are each of the following?*
- *There's space at the end to add any "unique-to-you" items as well*

Task	Essential	Important	Maybe	Not Important
Sourcing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Media Posting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shipping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education / Webinars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating Sales / Promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Photography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editing Photos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bookkeeping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiring & Training Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storing / Organizing Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Write / Send Newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Store SEO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepping Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Personal Holiday Assessment

- *Having a satisfying personal holiday celebration is all about focusing on the things that bring happiness and contentment and that honor cherished traditions*
- *How important are each of the following?*
- *There's space at the end to add any "unique-to-you" items as well*

Task	Essential	Important	Maybe	Not Important
Send Holiday Cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop for Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrap Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mail / Deliver Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend Thanksgiving Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Thanksgiving Dinner				
Attend Holiday Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend & Contribute to Holiday Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Holiday Dinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bake Holiday Goodies (cookies, fudge, candy, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kids' / Grandkids' School Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Church Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special Church Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday Parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Christmas Tree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Home Interior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Home Exterior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Parties / Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continued

Task	Essential	Important	Maybe	Not Important
Sing / Go Caroling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Santa with Kids / Grandkids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Holiday Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take a Family Holiday Photo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host New Year's Eve Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend New Year's Eve Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Halloween Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend a Halloween Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Traveling Family in Your Home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Put Away Holiday Decorations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pampering: Manicure, Hair Cut Spa Day, Massage, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Shopping Malls / Light Displays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy New Holiday Décor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Watch Holiday Shows / Movies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is MOST important?

If you could only do 6 of the things this holiday season that you classified as "Essential" on your Personal Holiday Assessment, what would those 6 things be? Rank them in order of importance to YOU.

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

Are you finding it really hard to narrow it down to just 6?

Add a couple of bonuses things that you could do BEFORE holiday crunch time hits on November 1st ...

Bonus #1 _____

Bonus #2 _____

If you could only do 3 of the things this holiday season that you classified as "Important" on your Personal Holiday Assessment, what would those 3 things be? Rank them in order of importance to YOU.

1. _____
2. _____
3. _____

Your Family's Personal Holiday Assessment

- *Sit down with your immediate family and ask them the same questions that you just answered and note their responses here – don't influence them in any way*
- *Majority rules! But note any really strong non-majority opinions by other family members*
- *There's space at the end to add any "unique-to-you" items that they make think of that may not have occurred to you*

Task	Essential	Important	Maybe	Not Important
Send Holiday Cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop for Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrap Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mail / Deliver Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend Thanksgiving Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Thanksgiving Dinner				
Attend Holiday Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend & Contribute to Holiday Dinner Hosted by Someone Else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Holiday Dinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bake Holiday Goodies (cookies, fudge, candy, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kids' / Grandkids' School Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Church Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special Church Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday Parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Christmas Tree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Home Interior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decorate Home Exterior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Parties / Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continued

Task	Essential	Important	Maybe	Not Important
Sing / Go Caroling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Santa with Kids / Grandkids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Holiday Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take a Family Holiday Photo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host New Year's Eve Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend New Year's Eve Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Halloween Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend a Halloween Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Traveling Family in Your Home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Put Away Holiday Decorations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pampering: Manicure, Hair Cut Spa Day, Massage, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Shopping Malls / Light Displays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy New Holiday Décor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Watch Holiday Shows / Movies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is MOST important?

If your family could only do 6 of the things this holiday season that they classified as "Essential" on the Family Personal Holiday Assessment, what would those 6 things be? Have them rank them in order of importance. Don't inject your thoughts – you've already had your turn!

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

Are they finding it really hard to narrow it down to just 6?

Add a couple of bonuses things that could be done BEFORE holiday crunch time hits on November 1st ...

Bonus #1 _____

Bonus #2 _____

If your family could only do 3 of the things this holiday season that they classified as "Important" on the Family Personal Holiday Assessment, what would those 3 things be? Have them rank them in order of importance. Don't inject your thoughts – you've already had your turn!

1. _____
2. _____
3. _____

What are each of your family members willing to actually DO to make their "Essential" activities and events happen? _____

Time to Compare!

How do your holiday "most important" things compare with your family's idea of what is "most important"?

Are your expectations in line with your family's expectations and wants?

Are you adding things to your plate that your family doesn't value as important to their holiday celebration?

Are your expectations too high?

Are your expectations too low?

Are their expectations too high?

Are their expectations too low?

Is there a happy medium?

Is it time to let go of some tasks, traditions or expectations?

Are there things anyone feels they are missing out on and want to add to their holiday experience?

Any other thoughts or observations?

RE-THINK THOSE GOALS!

- *Now you have lots more information about what you and your family value and want to be a part of your holiday season*
- *Does having that information change your major ideas and goals?*
- *3 **or less** main goals*
- *Be specific!*
- *Then break down those main goals into specific tasks or events for each month*

Main Q4 Business Goals:

1. _____
2. _____
3. _____

Main Personal Holiday Goals:

1. _____
2. _____
3. _____

^^^ ^^ ^^

- *What do you need to do each month to further each of your main goals?*
- *Be specific!*
- *Keep it simple -- Don't "pile on" too many tasks, activities and events*

September:

- Business Goal #1 _____
- Business Goal #2 _____
- Business Goal #3 _____
- Personal Holiday Goal #1 _____
- Personal Holiday Goal #2 _____
- Personal Holiday Goal #3 _____

October:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

November:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____

December:

Business Goal #1 _____

Business Goal #2 _____

Business Goal #3 _____

Personal Holiday Goal #1 _____

Personal Holiday Goal #2 _____

Personal Holiday Goal #3 _____