

Employee Resources:



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Career Audit Worksheet

How to use: Make a copy of this document and customize it to your needs.

Successful outcome: When your career feels off, it's easy to think you need a total overhaul. But clarity can come from stepping back and reflecting on what is working, to better understand what's not. This worksheet will help you identify patterns so you can make informed, aligned decisions about your next steps.

Set your intentions and space: Go somewhere you feel comfortable and creative. Make your favorite drink, light a candle and create a space where you feel you can authentically answer questions about who you are and what's important to you.

Step 1: Rate the core areas of your current role

On a scale of 1-5 (1=not at all true, 5=very true), how much do the following statements apply to your current work?

1. **Fulfillment and purpose**
 - a. I feel connected to the purpose or impact of my work. 3 ▾
 - b. I'm proud of the work I do. 3 ▾
 - c. I feel like I'm contributing to something meaningful. 3 ▾
2. **Growth and learning**
 - a. I'm learning new skills or deepening existing ones. 3 ▾
 - b. I have access to opportunities that challenge me. 3 ▾
 - c. I'm being stretched in a way that feels energizing, not exhausting. 3 ▾
3. **Compensation and benefits**
 - a. I feel fairly compensated for the work I do. 3 ▾
 - b. My benefits and time-off policies support my well-being. 3 ▾
 - c. I can meet my financial goals with this role. 3 ▾
4. **Manager and team**
 - a. I feel respected and supported by my manager. 3 ▾
 - b. I have healthy working relationships with my team. 3 ▾



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- c. Feedback is clear, constructive, and consistent. 3 ▾
- 5. **Work-Life Alignment**
 - a. My schedule allows for life outside of work. 3 ▾
 - b. I have enough energy left for myself at the end of the day. 3 ▾
 - c. I feel autonomy over how I do my work. 3 ▾

Step 2: What's working?

Look back at what you rated 4 and 5. What stands out as positive? What's contributing to that sense of alignment?

Write down 2-3 things that feel good about your work right now:

- 1.
- 2.
- 3.

Step 3: What's not working?

Look at your 1s and 2s. What feels draining, frustrating or misaligned? Which of these are tolerable for now, and which aren't?

Write down 3-4 things that feel off or unfulfilling right now:

- 1.
- 2.
- 3.

Step 4: What does this tell you?

Ask yourself:

- What themes are emerging?
- What has to change in order for me to stay in this role?
- What's missing that I want in my next role?
- Am I ready to make a change now, or do I need more clarity first?



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Step 5: Define 1 small action you can take

You don't need a 5-year plan. You just need to start. What's one small action you can take this week to get closer to alignment?

For example,

- Reach out to someone in a role you admire.
- Journal about your ideal workday.
- Schedule time to talk with a manager about a concern.

Write it down here: This week I will _____

Remember, your career is a series of experiments. Not a single, perfect path. This audit is a step toward more clarity, intention and purpose in the way you work.

[Click here to schedule time](#) with an expert to build your dream career