

Week 2: Wheel of Life Activity

| Time Needed | Materials Needed | Set-Up Needed |
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| 60 minutes (30 min each) | Wheel Handouts | N/A |
| Task, Content, Rational Aim | Background, Givens, Focus | Group, Mood, Experiential Aim |
| Increase understanding of areas that one has achieved success/satisfaction and areas requiring work. Examine strategies used to achieve. | Wheel of money and wellness allows participants to explore their satisfaction levels within the financial area of their lives, and then use this knowledge to assist with determining what to work on in their financial well-being. | Exploratory. Insightful. Useful. |
| Topics | Procedural Steps/Activities/Key Points to be made | |
| Wheel of Money introduction | <p>Introduce the Wheel of Money as a tool that can be used to measure your level of satisfaction in the areas listed. It is not a picture of how it has been in the past or what you wish for the future. It is a snapshot taken in this moment.</p> <p>The wheel of money, like the wheel of life contains eight sections that together represent one way of describing your financial well being. You, as a trainer, or your participant may have other labels or categories. The structure is up to you and your client.</p> | |
| Discussion | <p>The exercise measures the participant's level of satisfaction in these areas on the day he or she works through this exercise. It is not a picture of how it has been in the past or what the participant wants it to be in the future. It is a snapshot taken in the moment.</p> | |
| Key Points | <p>It is not a report card on how well the participant has performed or that he or she has achieved. The emphasis is on the participant's level of satisfaction in each area.</p> | |
| Activity | <p>Have participants fill out where they are on Wheel of Money. Guide group discussion on the results of the Wheel of Money.</p> <ul style="list-style-type: none"> • Ask participants to identify an area that they scored strongly. Inquire about what they are doing well in this area. Ask questions that allow them to clearly outline strategies they employ to be successful in this area. • Move onto an area that they scored low and they want to work on. Working off what they do well, move them to explore ways they can address this area utilizing the strategies that work for them in other areas. | |
| Discussion | <p>Guide group discussion on the results of the Wheel of Money.</p> <ul style="list-style-type: none"> • Ask participants to identify an area that they scored strongly. Inquire about what they are doing well in this area. Ask questions that allow them to clearly outline strategies they employ to be successful in this area. • Move onto an area that they scored low and they want to work on. Working off what they do well, move them to explore ways they can address this area utilizing the strategies that work for them in other areas. | |
| Break | <p>Have a small break before continuing onto the next wheel</p> | |

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| Wheel of Wellness introduction | Describe Wheel of Wellness and what it represents. Again, this wheel will measure satisfaction in these areas. It is not a picture of how well you have done in the past or what you wish for the future. It is a snapshot taken in this moment. |
| Activity | <p>Have the participants fill out their Wheel of Wellness. Ask what has come up for them in doing this exercise?</p> <p>Guide group discussion on the results of the Wheel of Wellness.</p> <ul style="list-style-type: none"> • Ask participants to identify an area that they scored strongly. Inquire about what they are doing well in this area. Ask questions that allow them to clearly outline strategies they employ to be successful in this area. • Move onto an area that they scored low and want to work on. Working off what they do well, move them to explore ways they can address this area utilizing the strategies that work for them in other areas. |
| Debrief | <ul style="list-style-type: none"> • Imagine that this is a wheel that carry's you through life. • What kind of ride are you having? <p>What can you focus on that may affect multiple areas that might provide a smoother ride?</p> <ul style="list-style-type: none"> • What do you think of the tool? • What were some 'aha's'? |
| Wrap-Up | Synthesize discussion/answers to debrief questions. |