

Your Quarterly Review

Printable worksheet · the interactive version lives at omnipsyche.org/therapyhomework



Name (optional) _____

Date _____

Why re-score instead of remember

Memory smooths things over. Scores do not. Re-rating the five needs fresh, without peeking at last quarter's numbers first, gives you an honest before-and-after that feelings alone cannot.

Have two things nearby: your **last five-needs scores** and your **current why statement** (both are in your saved copy of the workbook, or the last quarterly review). If you completed the workbook on this device, your saved why and ranking appear automatically where they are needed.

RE-SCORE THE FIVE NEEDS

1 Connection: how satisfied is this need right now?

Feeling genuinely close to people: known, accepted, and needed. Score before you compare.

1 2 3 4 5 6 7 8 9 10
Starving Deeply satisfied

2 Capability: how satisfied is this need?

Feeling competent and useful; your effort matters and someone notices.

1 2 3 4 5 6 7 8 9 10
Starving Deeply satisfied

3 Freedom: how satisfied is this need?

Real choices about your time, work, and path.

1 2 3 4 5 6 7 8 9 10
Starving Deeply satisfied

4 Enjoyment: how satisfied is this need?

Play, laughter, learning for its own sake.

1 2 3 4 5 6 7 8 9 10
Starving Deeply satisfied

5 Wellbeing: how satisfied is this need?

Health, energy, safety, stability.

1 2 3 4 5 6 7 8 9 10

Starving Deeply satisfied

THE COMPARISON

6 Now compare with last quarter. Which needs moved, which direction, and what do you credit or blame?

Even one point of movement is information. Flat is information too.

THE DIRECTIONS

7 Go through your ranked directions one by one. Mark progress honestly: what did you actually do on each this quarter?

Measure what you did, not just what happened. Directions you did not walk are not failures; they are data for the re-rank.

8 Re-rank for the season you are in now. Reorder or edit the list, retiring anything that no longer rings true.

Quitting a wrong direction is steering, not failure. Which direction feeds your currently hungriest need? Which would make the others easier?

9 Re-read your why statement. Does it still ring true? Rewrite it for this season, even if only a word changes.

If it survives untouched, copy it out anyway; writing it again is renewing it.

10 Last step: what is the first move of the new quarter?

One daily or weekly move for your new number 1, on the calendar this week. If its plan needs rebuilding, run the Deep Dive again for it.

Bring this to your next session. What you wrote here is exactly the kind of material good sessions are made of. Repeat the exercise whenever it is useful; the value compounds.

Michael C. Shedrick, M.S., PLPC, NCC. This exercise is for educational and informational purposes only. It is not therapy, not a substitute for professional diagnosis or treatment, and completing it does not create a counselor-client relationship. If it was assigned by your treatment provider, bring it to them. If you are in crisis, call or text 988 (Suicide and Crisis Lifeline). Free mental health education and tools: omnipsyche.org