

TASK ASSESSMENT CONVERSATION GUIDE



Purpose: Use this framework to help an individual or team reflect on current tasks, evaluate each for alignment with calling/purpose and energy impact, and agree on next steps.

Identify Your Core Tasks: List your recurring responsibilities or projects (aim for 8–12). Where do you spend most of your time?

#	Task	Calling Alignment (+1/-1)	Energy Impact (+1/-1)	Total Score	Keep / Delegate / Redesign / Drop	Notes
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

SCORING:

+1 if the task aligns with your calling/purpose; -1 if not. 0 if neutral.

+1 if the task energizes you; -1 if it drains you. 0 if neutral.

Total Score ranges from +2 (sweet spot) to -2 (warning zone).

INTERPRET THE RESULTS

+2 (Sweet Spot): Prioritize and protect.
0 to +1 (Neutral): Adjust to improve alignment or energy.
-1 to -2 (Warning Zone): Consider delegating, redesigning, or eliminating.

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Conversation Prompts

- Which tasks give you life and advance the mission?
- Which drain you or feel misaligned?
- What changes could improve your workload?
- What support or resources do you need?

Next-Step Commitments

Action	Owner	Target Date

Schedule a check-in in fall to review progress.