

Personal Success Drivers Worksheet

Discovering Your Unique Purpose as a Loan Officer

Introduction

This worksheet is designed to help you identify your core drivers—the elements that truly motivate you and give your work meaning. As we learned from Jack's story, when your work aligns with these core drivers, you'll experience greater fulfillment and sustainable success in your career.

Part 1: Reflection Questions

Take a few minutes to thoughtfully answer each question:

1. What initially drew you to the lending industry?

Your answer:

2. When have you felt most fulfilled in your work as a loan officer?

Your answer:

3. Describe a time when you made a significant positive impact on a client's life through your work.

Your answer:

4. What aspects of your role energize you rather than drain you?

Your answer:

5. If money were not a factor, what parts of your job would you still want to do?

Your answer:

Part 2: Identifying Your Core Drivers

Review your answers above and consider which of the following core drivers resonate most with you. Rank your top 5 in order of importance (1 = most important):

Rank	Core Driver	Description
	Making a Difference	Using your expertise to help others achieve their goals
	Building Relationships	Creating lasting connections based on trust and mutual respect
	Problem Solving	Tackling complex challenges and finding creative solutions
	Recognition	Receiving acknowledgment and appreciation for your work
	Continuous Learning	Mastering new products, skills, and knowledge
	Financial Success	Achieving monetary rewards and financial security
	Independence	Having autonomy and control over your work
	Leadership	Guiding and developing others
	Innovation	Creating new approaches and solutions
	Work-Life Balance	Maintaining harmony between professional and personal life
	Expertise	Being recognized as an authority in your field
	Personal Growth	Developing not just professionally, but as a person

Part 3: Aligning Your Work with Your Drivers

For each of your top 3 core drivers, identify:

Top Driver #1: _____

- How this currently shows up in your work:
- One way to incorporate this more into your daily activities:

Top Driver #2: _____

- How this currently shows up in your work:
- One way to incorporate this more into your daily activities:

Top Driver #3: _____

- How this currently shows up in your work:
- One way to incorporate this more into your daily activities:

Part 4: Redefining Your Success

Based on your core drivers, write your own personal definition of success:

Success for me means:

Part 5: Action Steps

List three specific actions you will take in the next 30 days to better align your work with your core drivers:

1.

2.

3.

Commitment

I commit to honoring my unique purpose and core drivers by taking these actions and periodically reassessing my alignment.

Signature: _____ **Date:** ____

Remember: Your purpose isn't something you need to invent; it's something you need to discover. It's already within you, waiting to be recognized and expressed through your work.