

# Live A New Life Story<sup>®</sup>

THE ART AND SCIENCE OF CHANGE, REINVENTION, AND SUCCESS



by David Krueger, M.D.

## The Workbook



MENTORPATH  
MIND OVER MATTERS

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**MENTORPATH**  
MIND OVER MATTERS

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# About the Author

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He is author of sixteen professional and trade books, and seventy-five scientific papers and book chapters on success, money, wellness, self-development, and mind-body integration. His latest book, *The Secret Language of Money* (McGraw Hill) is a Business Bestseller, and has been translated into 10 languages. [www.TheSecretLanguageofMoney.com](http://www.TheSecretLanguageofMoney.com)

Dr. Krueger formerly practiced Psychiatry and Psychoanalysis for over two decades, was Clinical Professor of Psychiatry, and taught on two Psychoanalytic faculties. He was listed in *America's Top Psychiatrists* by the Consumer Research Council of America, Washington D.C. in 2002, and *The Best Doctors In America* (Woodward/White, Inc. Publishers) annually from 1996-2002. He became a full time Executive Mentor Coach in 2002. He founded and served as CEO for two healthcare corporations, and co-founded a third that went from venture capital to merger/acquisition.

*Live A New Life Story®: The Owners Guide* combines those experiences, as well as groundbreaking research in psychology, neuroscience, and quantum physics with strategic coaching to guide new approaches to change. The principles in this *Owners Guide* incorporate Dr. Krueger's research and writing as well as other multidisciplinary thought leaders on the interactions of mind, brain, and behavior.

Dr. Krueger has appeared in TV documentaries and media interviews including Tom Brokaw's *America Close-Up*, and has been quoted in publications including the *New York Times*, the *Wall Street Journal*, *Money*, *Fortune*, *Forbes*, *Town and Country*, *Self*, *Lear's*, *Allure*, *Parenting Today*, and *Better Homes and Gardens*. He writes feature columns for a national magazine, and was elected to the American Society of Journalists and Authors. He works with leading executives and professionals, and presents internationally.

Carly Jennings, who collaborated on *Live A New Life Story®: The Owners Guide*, is a Parenting Coach, and Publisher of [MommyGarten.com](http://MommyGarten.com).



# Introduction

We learn through stories. Stories are how we understand and how we remember. A story is a system for holding together facts—a way things make sense. Defense lawyers know this. Little kids standing next to broken vases know this.

Behavioral patterns and belief systems downloaded especially from parents in the first years of life become automatic, to operate without observation or awareness. Neuroscientists estimate that about 95% of our behaviors and core beliefs are pre-programmed in the unconscious mind, operating on autopilot. We rarely ever observe these behavior patterns and beliefs because they're unconscious.

Then, we create two stories simultaneously:

- The surface story: that we run our lives with conscious intentions and aspirations. This dialogue includes “This is what I want from life.” “These are my positive aspirations.” Yet the conscious mind is a tiny processor that controls the mind and brain systems less than 5% of the time.
- An unconscious story: that ghostwrites behaviors—at times in a different direction than conscious intention. When your life and actions don't meet your positive aspirations, the dialogue can include, “I can't get what I want.” “The system keeps me from doing what I need.” “I don't have what it takes.”

Then we unconsciously fortify what “happens” in those first two decades of life, etching stronger pathways of emotion, assumption, and belief. We each develop a personal story with a plot and storylines. Our beliefs and assumptions ghostwrite that story. From an infinite sea of possibilities, our software determines what we perceive and process.

We don't see things as they are—we see things as we are. We see what we believe. And we're always right.

We tell our story. Then our story tells us.

*Listen for the power of story:*

Because most of the initial story is “set in” or ghostwritten before we are capable of being aware, it runs subconsciously, framing both our experiences and

our reactions. We are not, however, hard-wired for life. We can discover this underlying story and rewrite it to reflect who we are now. This process of mind change alters our brains as well. With new experiences, new neuronal pathways and new neural networks are formed. New highways to new communities in your brain. And, some remarkable new research shows, consistent repetition of new experience even alters gene expression.

When we write a new story—and change our minds—we change our brains.

When people construct their personal narrative, what they leave out, as well as the beliefs that ghostwrite behaviors, are often invisible. A personal narrative, unlike other narratives, is not announced directly. The narrator may not realize the story he is living, and can even believe he is writing a different story than people perceive.

*Now, we have a specific method for identifying personal stories and systematically changing their narratives.*

What follows is a specific method to identify a personal life story and rewrite it: a system to recognize and eliminate the outdated aspects and add what is fresh and authentic. In this way you create a new story to flow into, leaving the old behind. By actively editing past storylines as well as creating new potentials, you author successful personal, relationship, money, career, and wellness stories.

We will employ the seven step ROADMAP® program to effectively facilitate significant change:

- R**ecognize the authorship of your life story
- O**wn your present story
- A**ssess the storylines and plot
- D**ecide what to keep, enhance, let go, and avoid.
- M**ap changes.
- A**uthor new experiences.
- P**rogram new identity to incorporate and sustain the changes.

*Live a New Life Story® The Owner's Guide and Workbook* are a culmination of a professional lifetime of helping people change. As a Psychiatrist, Psychoanalyst for over two decades, and now as Executive Mentor Coach for the last decade, I have been privileged to co-author new stories with many ordinary and extraordinary individuals. Insights, understanding, even coming to the end of the past and ending an old story are not enough to create a new story. The



process of change itself must be addressed in an informed and systematic way. This unique and effective system will help you create strategies for success. This approach integrates the dynamic insights of psychology, neuroscience, and quantum physics with the principles of strategic coaching. The new story involves generating new experiences coupled with awakening hope, envisioning the future, and mobilizing talents and strengths to attain specific goals of personal growth.

*Live a New Life Story® The Owner's Guide* and *The Workbook* systematically informs active listening to recognize and assess a life story, inform choices, map new possibilities, and mentor a journey of transformation. Quizzes, exercises, and work pages in each Module provide the structure and strategies to evolve the participant's unique voice in writing and revising a new story. Each of the Modules guides the anatomy of change with principles, tools, exercises, and examples.

Many prescriptions for change ignite discomfort with the old story, even resolve an old story, yet fail to offer ways to develop a successful new story. This series offers a new delivery system for informed mentorship of life story transformation.

Beliefs drive behavior. Behavior drives performance. Changing your mind changes your brain and your life.





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The Workbook is designed to be used in conjunction with *Live a New Life Story*<sup>®</sup> *The Owner's Guide* and facilitated by a licensed and specialty-certified *New Life Story*<sup>®</sup> *Coach*.

In the metaphor of story and storytelling, *Live a New Life Story*<sup>®</sup>: *The Workbook* shows how to assess the plot of your life, master inevitable changes, and craft a new story. This Workbook will guide you through the essentials of change, reinvention, and success.

The Workbook is not a text, but a resource guide of tools to engage the process of creating a new life story. You will be guided to recognize and accept story ownership, assess the storylines, decide what to change, know how to change, create new experiences, and evolve identity to sustain the new story.

The modules inform active listening and understanding of your life story, and provide a structure to further the themes of personal development.

The exercises, quizzes, and principles serve as guide to systematically examine and revise basic storylines, as well as how to successfully create new ones.

*Live a New Life Story*<sup>®</sup> extends beyond writing a personal story to include creating new, powerful stories of money, relationships, career, business, and wellness.



# Section 1

## The Art and Science of Change

And telling her to ... never change, as though it were a choice, as though one of our greatest lessons isn't that change is the only constant. The seasons tell us, everything in organic life tells us, that there's no holiday. Still, we try to do just that. Sometimes, though, we learn the kind of wisdom that celebrates the open hand. Then we know that letting go of everything is the only way to keep the things that matter most.

*Elizabeth Berg, Never Change*

It is not the strongest of the species that survives, nor the most intelligent, but rather the one most responsive to change.

*Charles Darwin*







# Module 1

## Story and Story Assessment

It has been asserted that we are destined to  
know the dark beyond  
the stars before we comprehend the  
nature of our own journey.

*Loren Eiseley*

It is a theory which decides what can be observed.

*Albert Einstein*







## **MODULE 1**

### **STORY AND STORY ASSESSMENT**

Module 1 begins the process to recognize and accept authorship of your story. This ownership of a life story involves a review and assessment of plot and storylines, including understanding hidden emotional themes. For example: Why do people repeat behavior that doesn't work? Why do they persist with internal scripts that lead to stifling debt, disappointing careers, or stuck relationships? Then do it harder, yet expect a different result?

*Story ownership makes possible a review and assessment of plot and storylines.*

This Module provides a systematic method for identifying specific personal narratives, and understanding the assumptions that create them. Informed listening focuses on fundamentals such as repeated behaviors, passive vs. active voice, internal vs. external point of reference, and listening to the body as well as the mind.

**The first three steps of the *ROADMAP*<sup>®</sup> program will be addressed in this Module:**

1. *Recognize authorship of your story*
2. *Own your present story*
3. *Assess the storylines and plot*

#### **Workbook Tools:**

- *Calibrating Intuition*
- *Step One. Recognize Authorship of Your Story*
- *Step Two. Own Your Story*
- *Step Three. Assess the Storylines and Plot*
- *Distinguish and Address Ideals*
- *Distinguish and Address Needs*
- *Ideals and Needs Decision Tree*
- *5 Phase Plot Outline*
- *Life's Ground Rules: Paradoxes and Antipodes in the Story Construction*

## **CALIBRATING INTUITION**

As preparation for writing your new story, one of the tools you'll use is intuition. Intuition is a “knowing” not formulated from data or intellectual processes. Intuition lets the unconscious do its job without the logical brain's getting in the way.

Intuition can flow when you don't make assumptions, when you are very present and centered. It's related to flow—like the athlete totally immersed in a procedural body memory of performance. If athletes have to think about how to perform, even for a nanosecond, it takes them to a different part of their brains and out of flow; it interferes with performance. Intuition is an energy field of flow to be attuned to internally—which can then be applied to empathically resonate with others.

This exercise that will illustrate one way to program and calibrate intuition.

### **First:**

- Get in a comfortable position on your chair.
- Take some deep breaths.
- Say “Yes” to yourself many times.
- Think “Yes” to yourself many times.
- Feel “Yes” to yourself many times.
- Think about something that is a “Yes.”
- Be aware of what your body feels like when you experience “Yes.”

### **Then:**

- Think “No” to yourself.
- Feel “No” to yourself.
- Think about things that you associate with “No.”



- Experience what it's like in your body with “No.”
- “Yes” is usually associated with openness and receptiveness in your body.
- “No” is usually associated with emptiness, contraction, nothing.

This exercise to focus on body experience aligned with a Yes or a No also applies to reading someone else. A Yes results in a certain kind of body signal. A No results in a different kind of body signal.

In his book *Social Intelligence*, Dr. Daniel Goleman reviews the neuroscience of intuition and social connection. Our ability to empathically resonate with the emotion and experience of others is based in both mind and brain.

This exercise is only one example of our catalogue of intuitive perceptions. You can develop many more. Most are already there—just listen to them. Trust them. You can discern the people who withdraw from or deposit to your emotional bank account.

Just listen to your intuition.



## **Step One. Recognize Authorship of Your Story**

Plot—the core unfolding of the themes and storylines of life stories—informs what you look for and how you attribute meaning to what you find. You then create narratives of self-statement according to those assumptions, since brain and emotions are both programmed to ignore facts that contradict beliefs.

The first step toward enhancing a life story is to recognize story ownership. Then, assessing the storylines becomes possible in order to decide what to change. This ownership of a life story involves a review and assessment of plot and storylines, including understanding hidden emotional themes and recurring patterns.

The following questions will begin to help you understand assumptions that create them.

Focus on your basic life-story plot themes to first recognize the following aspects of your life story. Writing down the answers may be useful now, and to show progress later.

### **Needs**

- Do your basic needs and ideals align with your goals?
- Are you subjugating any needs to wants? Why?
- Do you need to become more of who you really are?
- Do you deny your wants or needs to avoid conflict, to please others, or to take care of others?

### **Ideals**

- Do you have clear internal ideals about who and what you want to be?
- Are you living up to your own ideals?
- Have you realized your potential?

### **Relationship**

- Who are you (or whom do you become) in an important relationship, such as with a spouse?



- In a relationship, is your personal growth facilitated, stymied, or ignored?
- Do you lose your individuality by taking on your partner or spouse's identity? Do you feel "less than" rather than "equal to?"
- What goals have you realized in your life?
- What goals have yet to be achieved?

### **Career**

- Who are you in your career?
- Do you define yourself by your job description?
- Are you reaching your full potential at work?
- Do you create a self-definition that facilitates growth, with definite goals, a specific and evolving life and career plan, and measurable success?

### **Identity**

- Reflect on the roles by which you define yourself—or allow yourself to be defined (such as spouse, parent, boss).
- Do you define yourself by your work, such as "realtor" or "nurse"? How important is that to you?
- Do you define yourself by a relationship, such as "wife" or "son"?
- What is your core identity that transcends all roles and relationships?
- Does your sense of self feel internally consistent despite varying external contexts?
- Who do you say that you are?

## **THE 4 R'S: REPEAT AND RATIONALIZE vs. RECOGNIZE AND REORGANIZE**

**Repeat:** Are you repeating an old story hoping for a better outcome?

The brain operates efficiently, to expend the least amount of energy to do a task. This efficiency means that the brain takes shortcuts based on what it already knows—the tracks already laid down and neurons tailored to certain tasks. The shortcuts save energy. The shortcuts also mean that past experience necessarily shapes current perception and processing. Psychoanalysts call this transference. Neuroscientists call it the efficiency principle. Behavioral economists call it diagnosis bias (physicians should as well, but often do not). For all of us, the brain perceives things in ways it has been trained to do. How we categorize something determines *what* we see.

This works great for many things. But the challenge is that imagination, which comes from perception, can be limited to what we already know. We can only imagine from our current experience and our known paradigms. Neuroscientist Gregory Berns examines the science of thinking differently—*iconoclasts* in particular—to emphasize how we need to put ourselves in new situations to see things differently and boost creativity.

**Rationalize:** Do you dismiss or compromise any aspect of your money story?

A repeating storyline may be as bold as always looking for the next big deal, or as quiet as habitually comparing yourself and your money to others. Or as pernicious as not being able to convert your talent into corresponding income.

If you feel trapped in your own recurring money story, such as chronic debt, consider your basic assumptions that ghostwrite the storylines. Better strategy won't either get you to a vague goal, or solve emotional conflict. Recognizing the internal origin of a process is difficult because an external drama always accompanies it. Some warning signs of this struggle include personal compromise, conflict with other people, limited success, unhappiness, or not living up to a full potential.

**Recognize:** Are your needs, ideals, passion, and talents all going in the same direction?

Listen to your language in regard to your goals. If you say you will *try* to reach a goal, you may be protecting yourself from anticipated failure. *Trying* speaks of



less than a full commitment, a potential diversion to other alternatives against failure. The words of someone not committed: “I’ll try,” “I should,” “I ought to,” “I know I need to.” These build in an “out.” When someone says, “I’m going to try to quit drinking,” you know that he or she will continue to drink.

If your money story is not satisfying, or if you haven’t attained your objectives, look more closely: *You are always reaching your goals*, whether they are conscious or unconscious. It is helpful to know consciously and specifically what those goals are. You might be undermining your success by being imprecise in your objectives. Do you fear specifically yet dream vaguely?

**Reorganize:** Do all the storylines fit and advance the plot of your money story?

Once becoming aware of actively making choices, you can decide what’s in your best interest, what furthers your story. And what doesn’t.

Your money story is the manifestation of your beliefs. You are always free to change your mind, always free to change your beliefs, including core assumptions about who you are. But first, you have to be aware. Then, assess what works and what doesn’t. Then strategize about how to change, and craft a plan to guide and map the progress for external and internal change.

When the brain encounters the unaccustomed or unexpected, perturbation occurs. The brain has to reorganize perception, which influences how we see things. We are pushed to see things in a different way—to be creative. Prompts include a novel stimulus, new information, or an unaccustomed context.

Here are some suggestions for creative stimulation.

- Be aware of the categories that you use for a person or idea—in order to go beyond or outside them.
- Seek out environments in which you have no experience.
- Bring together ideas from different disciplines and different perspectives to the same subject.
- Engage a Mentor or Coach to challenge new ways of looking at things.
- Follow intuition and gut feelings: write them down.
- Brainstorm and free associate: allow a stream of consciousness not bound by usual categories.



## **Step Two. Own Your Story**

### **ASSUMPTIONS AND MOTIVATIONS THAT CONSTRUCT STORYLINES**

Beliefs and assumptions generate the possibilities that you see. They then govern how you process what you perceive. Thus your perceived possibilities influence how you perform and whether you achieve your goals. Beliefs, created by you, become self-fulfilling prophecies, because they are lived out. Empowering beliefs include:

- I will do what I decide
- I believe the decisions I make to be good.
- I am competent to achieve my goals.
- I can make the money I need.
- I can find a way to love my work.
- I will teach people how to respond to me in a positive way by being positive.

Limiting beliefs also influence reality and behavior. Limiting beliefs have an effect emotionally and physically. Limiting beliefs include:

- I'm not good enough
- I don't trust people to be supportive.
- What I do won't be seen as important.
- My opinion doesn't matter.
- I will never make all the money I need.
- No matter how hard I try, it will fall short.
- No matter what I do, I will end up suffering.
- I feel stuck in repeating negative things.



As you transform beliefs, you write a new life story. Fundamental to any belief system is its point of reference. To initiate change, move your point of reference from external to internal, beginning with the following basic questions. Filling the space of the present moment with current feeling and experience leaves no space for old beliefs. Your old assumptions will not disappear, but you make them a memory rather than a lived experience. ***You can change your mind and it will change your life.***

- Is any pattern evident from your plot assessment?
- Do any themes stand out to you as you reflect on your responses?
- What do these patterns and themes articulate about how you think about yourself and others?
- How do they affect your behavior?
- Do you see the patterns repeating in other areas of your life?

**Identify basic aspects of your true self**

- What are you uniquely good at—better than almost anyone else?
- What are you most passionate about?
- What do you have special experience doing?
- What is your greatest personal ambition?

**Create your own experiences and your own reality.**

- What is the biggest obstacle that you currently face?
- What is the biggest challenge you face now?
- What is the one thing you most want to change about your life now?
- What is the one thing you most want to change about your work life now?

**Review your belief systems.**

**To challenge a belief, consider:**

- Does this belief still work? Help me function?
- What could I do if this assumption were not in place?
- What new acknowledgement would serve me better?
- Have I outgrown this belief?
- Have I discovered that this belief is no longer true?
- What is a more current adaptive belief?

**Become your own authority**

- Have you taken enough ownership as author of your own story enough to examine the basic assumptions and motivations constructing your storylines?
- Are you doing what you want, or are you doing what you believe feel you are supposed to do in each of the areas of your life?
- Are you engaging in impulse actions?
- Avoiding decisions?
- Making bad decisions?
- Responding to others' wants that eclipse your own needs?
- What are you saying "yes" to in your life that you need to say "no" to? Impulse actions? Bad decisions?
- What are you saying "no" to in your life that you need to say "yes" to? Change? Commitment? Avoided decisions? A challenge? Forgiveness?
- Do you hope or pray for magic, or the ability to understand and master?



Each of the storylines you create has its own history, its own consistency over time. The drama of everyday life does not just affect you, it is created by you.

Illuminating the story of your life, the plot and subplots, involves the same questions as understanding any other story.

- Identify and learn about the protagonist (you), your motives and conflicts, wishes and fears, the manifestations of your wishes and fears in your life drama, your entire internal experience, and how each scene ends—whether resolved or not, happy or not, complete or not.
- Identify the antagonist (you, also).
- And how the outside, identified antagonist (your proxy) was carefully selected and identified as an external representation of some part of you. What part of you does the identified antagonist represent? (It is not an accident that the external antagonist was chosen out of millions of possibilities to be a specific representation of some part of you that is unrealized, deleted, or repudiated).
- Is this antagonist like others in the past, with each relationship being the same process, only with different faces? For example, are you engaged in struggles and difficulty with authority involving your current boss similar to struggles and difficulty you had with other bosses in the past?
- How similar is this struggle to an original one with a parent?
- Is there a consistent theme or pattern of the important others, the social context, the storyline and its outcome?

These questions assess whether the past lives on in the present, and in fact ghostwrites some of the present. Observing and owning repetitions of themes and storylines allow you to understand your core assumptions that generate these repetitions. You see what you believe, and become it.

### **Listen for the assumptions and motivations constructing your storylines**

Core assumptions form the basic beliefs about yourself. Organizing, powerful, and influential, they fashion the storylines of your life. The harder you try to disregard, disavow, or counter them, the more intense their influence becomes.

The more intently you run from something, the more you engage it: you keep coming back to what you attempt to flee. What behaviors have you tried in vain to change? Those instances point the way toward a core belief. Someone who is constantly trying to please, even to the point of subjugating personal needs and wants, may assume that love only comes from continually pleasing someone else. The best indicator of your beliefs and values is your behavior.

- What patterns can you find?
- Do any themes stand out to you as you reflect on your responses?
- What do you care passionately about?
- What is your greatest personal ambition?
- What do these patterns and themes articulate about how you think about yourself and others?
- How do they affect your behavior?
- Do you see the patterns repeating in various areas of your life?



## **Step Three. Assess the Storylines and Plot**

### ***DISTINGUISH AND ADDRESS IDEALS***

Needs and ideals form core themes of personal story plot. Awareness of your unique blend of these elements will inform assessment of your present story, and guide you in its revision.

The following exercises will help identify your personal set of needs and ideals. A personal journey of integrity in aligning decisions with ideals includes:

- *Clarify your core ideals.*
- *Develop awareness of how each ideal applies to important areas of your life.*
- *Recognize and honor the hierarchy of ideals when making decisions (such as an immediate need of your child eclipsing your desire to learn and be creative).*
- *Attach a significance to each ideal and recognize the expense in commitment (such as knowing the sleepless nights and boring moments in having a child).*
- *Align beliefs and assumptions with ideals.*
- *Live your ideals. Protect them. If you have not been true to them with integrity for yourself, reclaim them. If you are unclear about each of them, focus sharply, and perhaps reconstruct fundamental values.*

## IDEALS CLARIFICATION EXERCISE

Ideals are internal standards of excellence. Ideals serve as a personal model of value—an internal guide to purpose. Living up to a personal, attainable ideal generates a sense of worth and esteem. Failure to live up to an internal ideal leads to feelings of shame.

From this list of ideals, choose the three that are most important to you. You may want to add others.

ACHIEVEMENT	GENEROSITY	LEARNING
ADVENTURE	GROWTH	MASTERY
BEAUTY	HAPPINESS	PEACE
CATALYZE	HEALTH	PLEASURE
CHARITY	HONESTY	POWER
CONNECTEDNESS	INDEPENDENCE	SELF-ESTEEM
CONTRIBUTE	INDIVIDUALITY	SENSITIVITY
CREATIVITY	INFLUENCE	SPIRITUALITY
DIGNITY	INTIMACY	SUCCESS
DISCOVERY	JUSTICE	TEACHING
FAMILY	KINDNESS	TRUTH
FEEL	KNOWLEDGE	WINNING
FREEDOM	LEADERSHIP	OTHER: _____

My top three ideals, in order of most to least important, are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## ***FOUR GUIDELINES FOR LIVING YOUR IDEALS***

Once you've clarified your ideals, consider ways you might begin to incorporate them into your life. For example:

### **1) See how they apply.**

Consider the different areas of your life, one by one—your career, life as a spouse, as a parent, a sibling, a friend, and any other areas—and explore how each of the top three ideals you've identified here applies to or reveals itself in each of these areas.

### **2) Honor your order of priorities.**

Recognize and honor the hierarchy of ideals when making decisions. For example, the immediate needs of your child might supersede a desire to learn and be creative.

### **3) Appreciate the price.**

Each ideal carries with it a price tag, so to speak; that is, there is a personal cost involved in being committed to upholding and honoring that ideal. For example, there will inevitably be sleepless nights and boring moments involved in raising a child.

### **4) Live your ideals.**

Think of yourself as a tigress and your ideals as your cubs: they are your life, and you will do anything and everything to protect them. If you feel you have not been entirely true to your ideals or protected them with that kind of fierce integrity, then choose this moment as your time to reclaim them.

If you are unclear about any one of the ideals you've identified, spend additional time focusing on it, and if you feel it's necessary, rewrite that list until it rings unquestionably true for you.

## ***DISTINGUISH AND ADDRESS NEEDS***

Unlike our ideals, which are standards of value to which we aspire, a need is an essential requirement that we must actually have present in our lives, a necessity for mind, body or spirit. Early in life, our needs consist of physical nurturance, empathic attunement, attachment, effectiveness, exploration, assertion, feeling and tension regulation, and sensory needs. In adulthood, our needs become adult versions of these same basic needs, all providing for physical requirements, comfort, identity, affirmation, love, communication, safety, and sexual/sensual needs.

Consistently meeting your own needs results in a sense of effectiveness and optimum functioning, like the satisfaction of having completed a task or project, knowing you have given it your best effort. Frustrated or unmet needs create the opposite feeling, of discomfort and ineffectiveness. For example, when the basic need for connection is derailed or nonexistent, we feel an emotional disharmony.

A need may be most obvious when it is not met.

As with ideals, each of us is unique and has a particular set of needs that we value more highly than the others. From the following list of needs, choose the three that are most important to you. This list isn't exhaustive; feel free to add others.

- |                        |                           |                        |
|------------------------|---------------------------|------------------------|
| <b>ACCEPTANCE</b>      | <b>EMPATHY</b>            | <b>TIME ALONE</b>      |
| <b>ACCOMPLISHMENT</b>  | <b>HARMONY</b>            | <b>REGULATION</b>      |
| <b>ACKNOWLEDGEMENT</b> | <b>NURTURANCE</b>         | <b>FOCUS ATTENTION</b> |
| <b>ACTUALIZATION</b>   | <b>ORDER</b>              | <b>RELAXATION</b>      |
| <b>CARE</b>            | <b>PHYSICAL ACTIVITY</b>  | <b>SELF CONTROL</b>    |
| <b>CERTAINTY</b>       | <b>RECOGNITION</b>        | <b>INTIMACY</b>        |
| <b>COMFORT</b>         | <b>SAFETY</b>             | <b>PASSION AT WORK</b> |
| <b>COMMUNICATION</b>   | <b>FINANCIAL SECURITY</b> | <b>PASSION AT PLAY</b> |
| <b>CONTROL</b>         | <b>EMOTIONAL SECURITY</b> | <b>OTHER: _____</b>    |
| <b>DUTY</b>            | <b>SIMPLICITY</b>         |                        |
| <b>EFFECTIVENESS</b>   | <b>STRENGTH</b>           |                        |



My top three needs, in order of most to least important, are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

When your needs and ideals are in synchrony with each other and are combined with a clear vision and defined goals, all of your efforts go in the same direction. It will feel right and result in mastery.

A discrepancy can exist for organizational systems as well as for individuals. For example, corporate *ideals* might include teamwork, leadership, caring for and promoting the creativity of employees, innovation, and realizing human potential. Corporate *needs* include productivity and the bottom line of profit and loss. When the core ideals of a corporation parallel its core values of an individual within that corporation, both grow.

## ***DISTINGUISH WANTS FROM NEEDS***

Wants or desires are not fundamental constructs like needs or values. A want can be replaced with another want, and fantasies are readily interchangeable—but one need cannot substitute for another need.

While ideals and needs both spring from the very essence of who we are, wants are far more circumstantial. A particular want, for example, may arise as the temporary manifestation of an unmet need from the past, such as the unmet need for affirmation as a child resulting in adulthood in the relentless pursuit of validation, accolades and accomplishments. While needs are universal, wants are tied to experiences uniquely personal and with their own particular histories.

Unsatisfied wants may result from not having a defined goal (not having a definition of *enough*), or from trying to satisfy a past want in present time. While you can get sick if you don't get enough of a need, you can also get sick if you get *too much* of a want. You can never get enough of what you don't need.

If the desires you have don't serve you, *you can choose new ones*. Like your money story, your wants are not carved in stone or cast in your DNA. And choosing desires for yourself that are in alignment with your needs—and even with your ideals as well—is a recipe for satisfaction.

An application: Spend based on who you are, not who you want to be.

People may buy something to pursue a hope or dream, expecting it will change who they are. Disappointment sets in when the books on cameras don't make someone a photographer, or tapes on learning a foreign language do not result in proficiency.

Consider purchasing as a reward, or when you need something, rather than with the expectation that it will change who you are.



## ***IDEALS AND NEEDS DECISION TREE***

**Ideal + Need → Goal → Commitment → Fulfillment → Self-validation**

Ideals and needs can be used to inform decisions and evaluate goals. This decision tree is one way to systematically assess and plan.

Conflicting needs, wants and values hinder our performance and drive us to invest time, money and energy in things that don't fulfill us. Accordingly, it makes sense to weigh every significant decision you make against the considerations of your ideals, needs and wants, *before* you make the decision.

- If the decision meets all three, it is a “Yes.”
- If the decision is in alignment with your ideals and needs, but seems to be in conflict with a particular want, it is a “Maybe.” Examine this particular want to see if it is significant enough to nix the decision. Since wants are more transitory than ideals and needs, a sound decision may overrule a want.
- If the decision opposes or does not meet one of your needs or ideals, then the decision can be “No” or “On hold.”

This alignment of ideals, needs and wants can be applied to establishing direction and goals in all significant areas of life: home, career, relationships, way of being, business, personal success, financial plan, and spiritual development.

We live in a culture that is often very goal-oriented. There is nothing wrong with being focused on a goal—as long as the goal aligns well with your ideals and needs. If it does not, then you are working at cross-purposes and cannot possibly win, because if you win, you lose.

Before adopting a goal as your own, examine it closely to see whether or not it is in synch with your top ideals and needs. If it does align well with your ideals and needs, then move to *commitment*.

Once you have committed to the goal, then be loyal to yourself by *fulfilling* that commitment, not simply because you said you would, but because that goal is an integral expression of your ideals and needs, and thus its full-out pursuit—not only its final accomplishment, but the journey along the way as well—also serves as an essential *validation* of your genuine worth.

Because the goal is aligned with your ideals and needs, it is a consonant expression of who you are.

### Case Illustration

Robert consulted me because he wanted to expand his business, but felt stuck. He was an acknowledged expert in a niche area, and supervised the work of some consultants who worked for him. Although he worked successfully on behalf of clients, his income didn't match his recognized expertise. And his own needs were not satisfied by his work.

We focused initially on what he did uniquely well, and on his primary passion.

I sent him the *Distinguish and Address Ideals* and the *Distinguish and Address Needs* exercises, and asked him to select from the prepared list the three ideals and three needs that best represented his core self.

Robert knew that money resonated with emotional issues throughout his life. Money had been the language of care and love in his family, seemingly the tangible evidence that his parents loved him, confirmed by a will that promised significant inheritance. He recognized that he had continued a storyline: to make substantial money meant he would give up his wish of being taken care of by someone else. Now, success and money accumulation meant taking care of himself. The impossible had become accessible, though now by his own efforts.

We recognized a disparity between his wish to be taken care of, his needs for autonomy and self-enhancement, and his ideals of mastery, creativity, and teaching others. His wants, needs and ideals were not in synchrony, nor were they aligned toward his goals.

He could now use this awareness as information to construct a new story rather than have it ghostwrite a new edition of the old story.

Robert recognized conflicting wants and needs as he progressed successfully toward goals in his business. He began taking care of himself in a much better way.



The result of our work was that Robert worked happily at doing what he did uniquely well. He leveraged his time and income by training and licensing people in his method, and franchised a component of his firm to a national group for significant residual income.

## **A 5 PHASE PLOT OUTLINE**

### **Phase 1. Assess your present situation**

- Where are you now?
- What accomplishments that are consistent with your beliefs and ideals are you willing to commit to?
- What has worked? And what has not?
- What has been missing that if you added now would enhance your life?

### **Phase 2. Visualize and generate possibilities.**

- Where are you going?
- What defines success? How will it look and feel?

### **Phase 3. Design a specific plan.**

- Create a mission that is stronger than your fear.
- Design a plan that honors your uniqueness, needs, and values.
- Establish a strategy and a series of specific, compelling, and short-term goals to arrive at a big-picture goal.

### **Phase 4. Work through each initiative and next best action for each goal.**

**Phase 5. Consider the impact of change on your identity. Your vision may involve changes in such fundamental notions as how and who you see yourself to be.**



## ***LIFE'S GROUND RULES***

### ***Some Paradoxes and Antipodes in Story Construction***

#### **Paradoxes**

1. You must engage what you run away from; running away is a very specific, focused, motivated action.
2. Acceptance is not acquiescence.
3. Passivity is a very determined activity. Forgetting is as active a process as remembering. Doing nothing is a specific decision, process and work product.
4. It is rare to see fully all that there is, yet nothing else.
5. Not requiring that others respond to you exactly as you want means that no one has control over you.
6. If you influence others to respond in the specific way that you want, and they do, you have rendered them inauthentic in your mind.
7. Activity is not necessarily the same as productivity; doing does not equate with being.
8. Assumptions and beliefs, like traumas, are ways of stopping time.
9. "More" is not a goal, but because it is elusive, it has appeal as a container of hope and happiness.
10. Suffering and desire are the two secrets we cannot keep.
11. See it big. Keep it simple.
12. Be aware of definitive statements that foreclose exploration. One man's statement was sufficient to explain all the unexplainable to him: "All women are females."
13. You can be strong if you allow yourself to be weak.

14. The only thing constant is change. Often the hardest work is accepting the changes.
15. The loss of the illusion is more difficult than the loss of the real thing.
16. The more you run away from something, the more apparent it becomes.
17. We criticize, perhaps to prove that we do not possess the fault.
18. Both opposition and conformity occupy the same prison.
19. Only when you feel fully secure can you be aware of how afraid you were before.
20. Fighting something engages it; accepting it lets it go.
21. Only the impossible is addictive—a fantasy that has been lost but given temporary hope by proxy.
22. The answer always gives birth to and shapes the question. Only by listening to the answers can you finally give voice to the question.
23. Adolescents can teach us the depth of superficial things.
24. If you don't change your direction, you are likely to end up where you are headed (ancient Chinese proverb).
25. Action is not the same as emotion. Judgment resides in the potential space between the two.
26. It is a moment of liberation to know that no one is binding you.
27. The most common thing that gets in the way of seeing something as it truly is, is our preconception of it. The most common thing that gets in the way of listening and understanding something, is trying to fix it.
28. Fear, change, and adventure are synonyms.
29. Mistakes and successes are teachers.
30. The past is a lesson. To let go of it and learn from it is a process.



31. “Finding” yourself is creating yourself.
32. All you have to do is the next right thing. Sometimes it isn’t clear what the next right thing is, but you can almost always be clear as to what it isn’t.

### **Antipodes**

The opposite of perfect is real.

The opposite of fear is freedom.

The opposite of control is mastery.

The opposite of doing is being.

The opposite of repetition is creativity.

The opposite of working harder is working smarter.





# Module 2

## Change & Change Evaluation

Everything you say reveals you.  
What you are speaks so loudly,  
I can't hear what you say.

*Ralph Waldo Emerson*

Claim the events of your life  
to make yourself yours.

*Anne-Wilson Schaefer*







## **MODULE 2**

### **CHANGE AND CHANGE EVALUATION**

When people change their minds and create new experiences, new neural networks and brain connections occur. Success involves creating a new story inside and outside: an evolving internal model combined with new experiences.

The module examines the basic life narratives and the plot of your story to evaluate which ones work and which do not. You are guided to enhance, expand, and develop the storylines that work, and transform those that don't into intentions and achievement. This module includes strategies to systematically understand, edit, and revise your life story.

**Steps four and five of the ROADMAP® program will be addressed in this Module:**

*Step Four. Decide what to change*

*Step Five. Map changes*

#### **Workbook Tools:**

- *Step Four: Decide What to Change*
- *4 Basic Inquiries for Storyline Evaluation*
- *Personal Feedback Questionnaire*
- *Compromise Inventory*
- *Compromise Resolution Schedule*
- *15 Reflections to Understand Your Storylines*
- *Step Five: Map Changes*
- *14 Steps to Edit your Life Story*
- *5 Steps to Revise a Storyline*
- *18 Caveats on How to Avoid Story Ownership and Change*



## Step Four. Decide What to Change

### 4 BASIC INQUIRIES FOR STORYLINE EVALUATION

#### 1. What do you want to *change*?

Anything you consider a problem, barrier, or obstacle, is created by you and cannot continue to exist without you. It is not a simple matter of getting over it, countering, or adapting to it: it will remain until you create something else through thought, feeling, and action. Consider creating something else instead.

An example is fear of public speaking. One approach: to convert the fear into an action plan that includes joining Toastmasters, to practice in a safe environment. By confronting the fear and setting goals that will resolve it, you overwrite the old story of ineffectiveness, and convert the worry or fear into an intention.

What are three behaviors or beliefs that you could change, reverse or leverage to help you toward financial success?

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

#### 2. What do you want to *let go of*?

In order to change, you also have to know what you want to let go. The bottom line, no matter how entrenched the process or how strong the hope, is “Does it work?”

As you evaluate, you may find things that you wished and hoped were different, but remain unsatisfied. This is the time to decide whether changing your strategy would make a difference or if it’s best to let go and free your attention for creating other things. Emotionally, this may be difficult, but determine to learn what you can from it, so that it becomes an opportunity for self-awareness and correction that will enhance your



future stories. In this way you are learning to convert what could have been perceived as failure into growth.

Review your money beliefs and behaviors. If you could eliminate three of them from your life, which ones would have the most impact?

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

**3. What do you want to *avoid*?**

There is always the pull of the old and the fear of the new. Yet there is no future in repetition. For example, avoiding engagement with someone who is draining protects your energy for a more productive choice.

What three things can you avoid that will positively rewrite your money story?

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

**4. What do you want to keep and *enhance*?**

Your money story, like your life story, is the manifestation of your beliefs. Changing your mind changes your brain and your life: beliefs, goals, and visions drive action. Choose carefully what you engage.

Choose three areas of your existing money story that you'd like to keep or enhance:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

## **PERSONAL FEEDBACK QUESTIONNAIRE**

First determine who knows you best and who will give straightforward feedback (family, colleagues, boss, minister, etc.). Ask each one to jot down their impressions, opinions, and suggestions about you.

**Ask these people what each of them sees as your:**

- Strengths
- Potential
- Special skills
- Personal and career possibilities
- Blind spots
- Unrealized potential
- Winning strategy (personality style that you most rely on, even when it doesn't work)
- Next step to take
- Distractions/derailers
- Work environment in which you would work best
- Work environment you should avoid

What did you learn from the feedback you received? How will you use their feedback to create a strategy for proceeding in each area of your life?

**Knowing what you want to achieve is crucial, with a game plan, specific steps, and measurable results. Review your responses in these four areas.**

- What do you want to achieve?
- What do you want to maintain without change?



- What do you want to change?
- What do you want to eliminate or avoid?

### **Prioritizing Goals**

1. Which of the issues will resolve itself without your doing anything?
2. What is the one thing that bothers you the most?
3. Choose the issue to resolve that would make the biggest difference in reducing your stress level.
4. Is there anything blocking your ability to get this done?
5. What have you learned that would be useful to you in this focus?
6. Imagine what would happen if you viewed a fear of making a mistake as an indication that a problem needs to be solved rather than as a sign of danger?

## COMPROMISES INVENTORY

Compromise: Something you tolerate that takes time, energy, peacefulness, or money from you in a recurring, unsatisfying way. Compromises seemingly avoid conflict and strive to create a certain appearance.

Compromises at home include such things as household repair needs, cleaning needs, messiness, or noise boundary violations. Compromises in work life can be inadequate space, wrong field of work, poor communication, lack of mission, improper technology, or dysfunctional hierarchies. Compromises regarding family, friends, and colleagues include imbalance of support or friendship, blurred boundaries, misunderstandings, and the need to change fundamental agreements.

Compromises can be systematically approached in these four major arenas:

- *Physical*
- *Emotional*
- *Relationship*
- *Financial.*

Compromises usually result from disregarding a personal need or being disloyal to a personal ideal. Toleration of the compromise seemingly avoids conflict and strives to create a certain appearance.

After each of the four compromises write the need or value you will honor as you resolve the compromises.

In the exercise that follows, list a significant current compromise in each of the four major areas.

- Design a time goal by which you will resolve, reframe, or accept each compromise to reclaim the engagement and energy given to it.
- Choose to resolve it by a certain date, for example, cleaning up a messy office within seven days.
- Reframe the toleration by moving resolution to a certain future date to avoid its being a daily energy drain.
- Distinguish reframing from procrastination; an example may be to revise a home office system during a part of summer vacation.
- Or accept a concession that you have no control over and cannot determine, such as a spouse's driving habits; move it to the acceptance list to disengage from it.



## **COMPROMISES RESOLUTION SCHEDULE**

**Physical Compromise:** \_\_\_\_\_

I choose to:  Eliminate by (give date):

Move to: Year 20\_\_ list\_\_

Accept and assign it to my:

Gratitude List

Worry List

Forever List

Strategy: \_\_\_\_\_

The need or value I will honor to resolve the compromise:

**Emotional Compromise:** \_\_\_\_\_

I choose to:  Eliminate by (give date):

Move to: Year 20\_\_ list\_\_

Accept and assign it to my:

Gratitude List

Worry List

Forever List

Strategy: \_\_\_\_\_

The need or value I will honor to resolve the compromise:

**Relationship Compromise:** \_\_\_\_\_

I choose to:  Eliminate by (give date):

Move to: Year 20\_\_ list\_\_

Accept and assign it to my:

Gratitude List

Worry List

Forever List

Strategy: \_\_\_\_\_

The need or value I will honor to resolve the compromise:

**Financial Compromise:** \_\_\_\_\_

I choose to:  Eliminate by (give date):

Move to: Year 20\_\_ list\_\_

Accept and assign it to my:

Gratitude List

Worry List

Forever List

Strategy: \_\_\_\_\_

The need or value I will honor to resolve the compromise:



## ***15 REFLECTIONS TO UNDERSTAND YOUR STORYLINES***

1. What are the recurring storylines in your life that work?
2. What are the recurring themes in your life that do not work?
3. Is there a piece of your life that is un-lived?
4. What goals have you realized in your life?
5. What goals have you not realized in your life?
6. Do you have a clear internal ideal of who and what you want to be?
7. What percent of your full capacity are you putting to use in your work?
8. What percent of your capacity are you living in your personal life?
9. Who are you (or who have you become) in your most intimate relationship?
10. What are your conflicted storylines where it is obvious not all of you is going comfortably and effectively in the same direction?
11. Do all the storylines fit and further the plot you want to advance?
12. What do you continue to engage by disclaiming and denying?
13. Do you have an awareness of your different states of mind?
14. Do you have basic mastery of how to enter and exit various states of mind?
15. What do you hear in listening to your body's somatic language?

## **EXERCISE: DECONSTRUCT A CONCERN** **(To see what it teaches you)**

An example: an active internal critic. Let's consider how to transform your inner critic into an inner coach by listening to the rest of the story.

**Write down the biggest health concern your inner critic says:**

*"I don't exercise enough."*

*"I need to lose weight."*

*"I drink too much."*

Hear four storylines in each statement: anger, fear, request, and love. That is, listen for the anger, fear, request, and love in the concern.

**This is how each of the four storylines can sound:**

Anger: "I'm mad at you for not taking care of yourself and eating right."

Fear: "I'm afraid for your health."

Request: "I want you to eat at least four servings of vegetables a day, cut out desserts, and work out four times a week."

Love: "I want you to be around a long time and feel alive and energetic."

You don't confront your dragons to defeat them; you confront them to get to know them. To learn what they've done for you so they can get the respect they deserve. Then, with the pride of a mission accomplished, those dragons can rest peacefully and let you proceed, knowing they're safe—and appreciated.

*Be careful lest in casting out your devil, you cast out the best thing in you.*  
~ Nietzsche



## **Step Five. Map Changes**

### **14 STEPS TO EDIT YOUR LIFE STORY**

*Five frogs were sitting on a log. Four decided to jump off. How many were left?*

*The answer: 5, because the 4 only decided and planned—they didn't **do** it.*

This exercise addresses invisible—and not so invisible—decisions camouflaged as beliefs and assumptions. The active editing of your story begins here. You can track the moment in time when you made your original decision that led to a view or belief that is limiting. Most often the original decision arises from disappointment, or negative past experiences.

An example is a decision to be overly cautious about investments, to protect yourself in case of loss or misrepresentation. If this belief stems from earlier negative experiences, it may dictate rather than inform subsequent decisions. To move ahead, first convert a fear to an intention: such as outlining a course of study, and consult with a financial planner. Then move the intention to a commitment.

#### **Editing Steps**

1. Get to the fundamental beliefs you hold in your life. For example, you may believe that being born without money means you'll never amass wealth; or not being a good public speaker means you must avoid the limelight.
2. Realize that you decide what to perceive. You also decide what meaning to attach to your perceptions. And you decide the behavior associated.
3. Each day is a new and blank page. You will write whatever you choose this day. It is not there unless you choose it and create it.
4. Clarify what you want to create, and what action would be paired with it. You are always free to change your mind.
5. Try new perspectives and possibilities to get informed data. For example, a fear of public speaking can be converted into an intention to improve, and a commitment to join Toastmasters.

6. Honor your uniqueness. Combining what you do uniquely well with your passion makes you unstoppable.
7. Embrace that which you can determine and which benefits you, consistent with your needs and values. Let go of all that you can't determine, and which doesn't serve you.
8. The bottom line of any theory or belief system is this: Does it work now?
9. Make yourself a promise about how you use, invest, and refurbish your life energy based on your life plan.
10. Design short-term, step-wise measurable goals to validate your progress. Hold yourself accountable to the timetable of your goals. Change is a process.
11. Create a mission that is stronger than your fear.
12. Focus your energy on where you are—the present—and on where you are headed—the future.
13. Keep your eye on the ball and your head in the game.
14. Know what enough is.



## **5 STEPS TO REVISE A STORYLINE**

### **Align needs and ideals with your goals.**

- In the story of your life, is all of yourself going in the same direction, or do you seem to undermine yourself in certain areas of your life?
- Do all the storylines fit and advance the plot?

### **Address resistance to change and repetition of the old story.**

- What are the repetitions in your life that are dead-end and dissatisfying?
- What are the things you'd like to change in your life in the next 90 days?
- Are you willing to do it?

### **Create your own experiences and your own reality.**

- If you could add three things of vital importance to your life beginning this month, what would these be?
- Develop an internal point of reference; change occurs from the inside out.

### **Change only what doesn't work.**

- What in yourself would you like to enhance?
- What do you do uniquely well, better than almost anyone in the world?
- Are you devoting enough time and energy to developing your unique and undeniable talents and interests that distinguish you?

### **Decide what you want to change.**

- What is the one thing you most want to change about your life now?
- What is the one thing you most want to change about your work life now?

## **18 CAVEATS ON HOW TO AVOID STORY OWNERSHIP AND CHANGE**

1. Focus on the system. Devote special attention to the things that seem frustrating, out of your control, and impossible to address: politics, corporations, and economics. Systems must remain in focus as broad categories for you to feel distanced and disaffected.
2. Maintain a focus on theory. Avoid detail, singular aspects, and application. Remain theoretical about how to transform various systems, about what needs to be done, maintaining the frustration of what seems to continue out of your control.
3. Believe that the answer will appear when you step out of the box, or when you simply oppose the system.
4. Keep the point of reference external; keep believing that the antithesis of conformity is opposition; know that one or the other of these external points of reference of conformity or opposition holds the real truth.
5. Do not decide. Allow the urgency of a situation to decide for you. The gravity of a last-minute emergency forces action and avoids planning. Waiting for the deadline excuses responsibility for thoroughness and excellence.
6. Believe that the answer is more rules and further structure.
7. Debate the obvious; give energy to the controversial.
8. Believe in experts unequivocally, and that expertise is authoritative. Dismiss any notion that expertise is perceived, processed, and filtered through assumptions, belief systems, and prejudices of experts.
9. Do not seek your own information or develop your own solutions when you have experts to listen to. Rather, find someone to provide a map for you and avoid anyone who wants to help you develop your own navigation system.



10. Always find some cause-and-effect relationship to explain things otherwise not understandable. Maintain a consistent external focus to blame someone, or find some tangible explanation that offers a specific, concrete focus on what is wrong. Warning: Much work is required to maintain this caveat, as you must be certain that the obstacle can never be totally removed, or its causal effect would have to be confronted as inaccurate. The perceived cause must always be just beyond reach and remedy in order to remain as blame.
11. Keep doing the same thing and expect a different outcome. If the outcome doesn't change for the better, do the same thing harder.
12. Be suspicious of new ideas.
13. New ideas, being perturbations of the existing system, must be curbed or even silenced.
14. Meticulously guard against mistakes; the best way to be sure to avoid mistakes is to keep doing the same thing again and again with perfection as the goal.
15. Maintain a focus on failure, giving it the proper respect of fear so that it remains ever in focus with its guiding principle of avoidance.
16. Be extremely wary of new strategies and solutions, and invest instead in enforcement of the existing approach.
17. When you make mistakes, focus on the mistakes and attempt to get them right.
18. Continue to hold prejudices because they are markers of emotional landmines.





# Module 3

## Guide to Lasting Change

Caminante no hay camino.

Se hace camino al andar.

(Wanderer, there is no path.

You create it as you walk)

*Antonio Machado*

People cannot discover new lands until they have  
courage to lose sight of the shore.

*Andre Gide*







## **MODULE 3**

### **GUIDE TO LASTING CHANGE**

This module presents the process of creating a new story as well as evoking a new identity to incorporate and sustain the changes. How to set goals and insure their success, steps to ignite change, and guidelines for life story change are all elaborated in this module. An exercise to create a vision presents the principles of design and fulfillment of this success tool.

**Steps six and seven of the ROADMAP® program will be addressed in this Module:**

*Step Six. Author new experiences*

*Step Seven. Program new identity to incorporate and sustain the new story.*

#### **Workbook Tools:**

- *Step Six: Author New Experiences*
- *Strategic Goal Pursuit*
- *Success Insurance for Completing Goals*
- *11 Steps to Ignite Change*
- *Step Seven: Program New Identity to Incorporate and Sustain the New Story*
- *12 Basic Principles of Change and Transformation*
- *32 Guidelines to Further Life Story Change*
- *Creating a Vision*

## HOW WE FACILITATE CHANGE: 12 PRINCIPLES

1. **Each person's life story is created.** You create whatever you think, feel, and experience at each moment. Every day is a blank page until you begin writing on it—even though it seems to “just be the way things are.” The first step is taking ownership of your story, including the assumptions that generated default behavior.
2. **Understanding begins with examination of which storylines work and which do not.** The next step is changing the ones that do not work, while keeping or even enhancing those that do work.
3. **Knowing what not to do is at least as important as knowing what to do.** You may not always know what the next right thing is, but you can almost always know what it isn't.
4. **Questions are more powerful than advice.** Questions can direct, clarify, illuminate, and even story-bust. Advice invites acquiescence or resistance; questions move the process from compliance to collaboration.
5. **When people create their own answers, they have signed on to invest in the outcome.** This investment elicits a sense of effectiveness and mastery.
6. **Identify four things: What to change, accept, let go, and enhance.** Doing this allows you to put your energy into what works, and allows you to accept and let go of what you can't change. Making this simple distinction both liberates and enhances effectiveness.
7. **We don't see things as they are; we see things as we are.** Learn to recognize your own assumptions and beliefs, and how they color what you perceive. Assumptions manifest as feelings and behaviors. By making assumptions explicit, you become able to perceive those that facilitate and those that interfere.
8. **Change is constant and inevitable; resistance to change is what generates most problems.** We are most successful when we learn from yesterday, anticipate tomorrow, and integrate the impact of new experience.
9. **Small changes lead to big changes.** Issues that seem overwhelmingly large and insurmountable can be approached by looking at the simplicity of the issue, specifying a small step to take for progress. For example,



someone who feels overwhelmed at work by the number of tasks expected of him can identify one issue to deal with effectively within the next day. This focus on a specific action exercises effectiveness and initiates a model of mastery.

10. ***Solutions, causes, and problems are not always related or even interconnected.*** Resolving a problem, even emotionally coming to the end of the past, does not create a blueprint for success. Strategic planning for specific goals is necessary. For the person with an eating disorder, there are no prepackaged answers awaiting discovery. She is moving into new developmental territory without a map
11. ***A collaboration keeps both individuals on the same side, looking at the same scene together.*** Empathic listening keeps the professional aligned with the client's point of view and builds common ground for work.
12. ***The benefit of doing more of what is working and less of what isn't working will become evident and self-perpetuating.***



## **Step Six. Author New Experiences**

### **STRATEGIC GOAL PURSUIT**

#### **SMART Goals**

Goals are exciting and energizing. They make it easier to focus, and make it clearer when distractions occur. SMART goals co-create moving ahead and specifically hone strategies. SMART goals include these components:

- *Specific. (Be very specific about a goal—e.g., “getting fit” is not a goal but an outcome.)*
- *Measurable. (A way to track efforts and sustain energy and motivation)*
- *Achievable. (The goal must be attainable)*
- *Realistic. (Make sure you are willing to pay the price of your goal)*
- *Time-bound. (There needs to be a beginning and an end—time-framed)*

#### **Initiatives**

*For each goal, establish three key initiatives to move toward that goal.*

#### **Next Best Action**

*For each initiative, decide on the next best action.*



## ***SUCCESS INSURANCE FOR COMPLETING GOALS***

Goal-setting, especially the proper tools to strategically structure progress, is crucial for long-term achievement. The usual problem, however, is not setting goals but completing them.

Goals and strategy require management and dedication.

The section entitled “A review of research on goal setting” (Goldsmith, M., and Lyons, L., eds. *Coaching for Leadership, Volume II*, Wiley, 2005) helps us understand two essential components: Why people give up on goals, and how effective goal-setting can help ensure long-term achievement. Six of the most important reasons people give up on goals follow:

- ***Ownership.*** People must “buy in” to their goals and take ownership. This shifts the ownership and initiative to an internal point of reference. Then, effectiveness and mastery can come about.
- ***Time.*** Goal-setters tend to underestimate the time it will take to complete the task (an “optimism bias”), a habit that leads to giving up.
- ***Difficulty.*** Along with the factor of time, the optimism bias applies equally to difficulty.
- ***Distractions.*** People tend to underestimate potential distractions and competing goals.
- ***Rewards.*** Disappointment sets in when achievement of a goal doesn’t translate into other goals or to the desired happiness.
- ***Maintenance.*** Maintaining changed behavior is difficult, and there is always the pull of the old and the fear of the new.

## **11 STEPS TO IGNITE CHANGE**

- Have needs and ideals in sharp focus.
- Know what you do uniquely well.
- Assess specific strengths, passions, and weaknesses.
- Establish SMART goals: Specific, Measurable, Achievable, Relevant, Time-Bound (timetable: 30-90 days).
- Determine 3 Key Initiatives to take for each goal (timetable: 1-2 weeks).
- Decide on the Next Best Action for each initiative (timetable: 2-3 days).
- Structure a strategy to reach and stretch each goal.
- Increase tolerance of planned risk with associated fear.
- Focus on specific results, action, and momentum regarding goals.
- Continue assessment of disciplined activity with refinement of goals.
- Endorse your progress.



## **WHY ARE BAD CHOICES SO EASY AND GOOD ONES SO HARD?**

This was the first question I was asked by one of the participants in a recent seminar series.

She elaborated, “Everything you discussed about our resistance to change resonated with me. I’m wondering about something I’ve witnessed in others and myself: Why is it relatively easy to make changes that undermine our best interests? Is the ease of making the ‘bad change’ the path of least resistance, and of our hedonistic tendencies?”

- We naturally resist moving away from our comfort zone of familiarity, not only because we know the outcome, but also because it’s the default mode grooved in both the mind and the brain.
- “Bad” choices usually involve immediate reward (cheesecake, drugs, risk). Dopamine mediates the excitement of even anticipating a pleasure.
- “Good” choices involve later payoff (broccoli, exercise, saving money). The good news is that with repeated new experiences we can rewire our brains and revise mind software—new pathways to new communities in the brain.
- The key success strategy to write the next chapter of a life, wellness, or money story is a structured plan, and to stick to it.
- An aspect of that plan is to learn specifically from the past what you don’t want to include.
- Commitment devices can make good choices consistent. Prioritize “shoulds” and then reward with “wants” to reframe the “wants” as part of a performance ethic. This contingency removes guilt from what you know you’re going to do anyhow.
- A continuity program makes a good decision automatic. An example is automatic withdrawals to fund a retirement account.



## **Step Seven. Program New Identity to Incorporate and Sustain the Changes**

### **12 BASIC PRINCIPLES OF CHANGE AND TRANSFORMATION**

#### **1. Awareness of your plot and storylines.**

The beginning of change is recognition that you are the author of your story. In the face of a personally created problem, barrier, or obstacle, the task is not getting over it, pushing through it, or adapting to it: It is recognizing that the obstacle is not there until you create it. Consider the possibility of not creating it and creating something else instead.

#### **2. Assess the storylines that work and those that do not work.**

In order to change, you first need to know what you want to change, and what you want to create instead in each aspect of your life: Career, ideals, personal life, functioning at full capacity, happiness, relationships, financial. The bottom line, no matter how entrenched the process or strong the hope, is “Does it work?”

#### **3. Recognize passive vs. active positions.**

Active: You are the author, the casting agent, and the director of your story.

Passive: Fate; luck; destiny; assuming that you are the victim of the feeling you create, as in “I got butterflies in my stomach,” or “My fear took over.”

#### **4. Listen to your language—it speaks your assumptions.**

Words reveal an internal model.

Pressure words reveal an external point of reference and authority rather than an internal one: Should; have to; ought to; need to. Passive language indicates perceiving yourself as the subject rather than the initiator of action: “The thought occurred to me; my anger got the best of me; it just happened.”



Limitation words reveal the assumption of constraint and limitation:  
Impossible; can't; shouldn't.

**5. Address resistance to change and repetition of the old story.**

Repetition ensures predictability. We repeat behavior that doesn't work because it offers familiarity. Doing the same thing leads to a known outcome. We sometimes mistake predictability for effectiveness.

There is no future in repetition. Any departure from the familiar, even a positive one, creates anxiety and uncertainty. You need a new story to be in before you can give up the old story.

**6. Take ownership of your story to become your own authority.**

Reinvention begins with taking ownership of what you do, and what you do about what happens next—rather than living out what just seems to happen, or feeling victimized by forces beyond your control.

**7. Decide what you want to change.**

Your life is the manifestation of your beliefs. Old beliefs do not generate new ideas. Changing your mind changes your life, as beliefs, goals, and visions drive action. Choose carefully what you engage.

**8. Excitement and fear are the same feeling just viewed and experienced differently.**

Excitement counters anxiety when your mission is stronger than your fear.

**9. Construct a map to determine where you are.**

Without a map to determine where you are, proceeding with an organized and successful story (life, career, relationship, investment, etc.) will be difficult or impossible. With a map, you can see where you are, how far you've come, and how far you have to go to reach your goals.

**10. Decide where you want to go.**

Having a map allows you to filter distractions, determine the route, and discern what is tangential or a detour. Distinguishing what you want to achieve, preserve, and avoid is an ongoing process.

**11. Figure out how to get there.**

Create a game plan of realistic, attainable goals with measurable results.

**12. Stick to the plan.**

It is never too late to become what you might have been. Or too soon to become who you want to be.



## **32 GUIDELINES TO FURTHER LIFE STORY CHANGE**

### **1. Distinguish need from want.**

You can get sick if you don't have enough of what you need, and you can get sick if you have too much of what you want.

### **2. You always have the right to say no or yes.**

Don't hesitate to say no or yes when you are clear about what you want and need. Also, as a wise mentor once told me, never speak more clearly than you think. The other person also has a right to say no or yes. So don't hesitate to ask.

### **3. You have to be free to say no before you can be free to say yes.**

Unless you are free to say no, yes has no meaning.

### **4. Coming to the end of your past, especially resolving emotional issues, isn't enough: You have to have a purpose, a dream, in order to give hope a blueprint.**

### **5. Have a "big picture" and bring it into focus whenever necessary.**

The big picture consists in your own ideals and principles, and objective organization of your life and decisions according to what you believe to be in your best interest.

### **6. Establish priorities.**

Every day you will redefine and refine priorities, and make decisions about what is really important in each area of your life: Family, work, health, friendships, leisure, self-care, and finances, to name a few. A neglect in one area creates imbalance.

### **7. Have specific, attainable goals on a short-term, daily basis, as well as in the big picture.**

Setting specific goals allows self-affirmation once you attain them.

**8. Disengage from “what might have been.”**

You may lose today and tomorrow looking back for yesterday. “If only” fantasies idealize the past and erode today.

**9. Engage what you can be effective in doing and disengage what you have no determination over.**

Adhering to these two tenets and distinguishing the difference between the two can create a powerful impact on your life.

**10. Seek out suggestions, critiques, and advice.**

Consult with people knowledgeable in specific areas. At times this may be difficult emotionally, when it would seem easier to consult (collude) with someone who would mirror and agree with your own opinions rather than listening objectively to critical or contradictory information. Don’t limit yourself with your imagination, because your imagination has to evolve from your present model. Other points of view may be a catalyst.

**11. Sleep on it. Recognize that there are few true emergencies in life.**

Weighing different factors, gathering data, and perhaps consulting experts work best to make most decisions. Rarely does any legitimate crisis demand that these steps be skipped. A classic example is the promoter who tries to push you into an overnight decision, to make money decisions in a fraction of the time it took to earn the money. Decisions based on impulse, frustration, or anger may need to be postponed until objectivity is regained. Calling a time out is a useful maneuver for emotionally charged matters. “Let me think about that and I’ll get back to you” is a decision.

**12. Select goals consistent with your self-image.**

This is necessary to have all of you going in the same direction. We live our lives based on our beliefs and assumptions; to change your life you must first change your belief.

**13. What you decide to accept undergoes a change.**

To forgive someone is to free yourself.



**14. To get what you always wanted in the past may not feel as good as you expected, because it is no longer the past.**

Just having a choice can make choosing the same thing feel very different.

**15. For an end point, ask yourself, “What is good enough?”**

Driven pursuit of perfection arises from not having a standard of good enough—of not having established an end point.

**16. The question “What is in my best interest?” should always be in the background and, at times, the foreground as well.**

Asking this question is just another way to assess the big picture at a time when you may be focusing on details, or in the grips of excess emotion.

**17. The past may not be the best or the most relevant context in which to understand the present.**

The model of understanding must fit the situation, your style, and personality; it should be consistent.

**18. Create a contemplation space to ponder decisions, especially emotionally freighted ones. Between an urge and an action lies a potential space in which judgment resides.**

**19. Growth involves enduring uncertainty.**

**20. Not only can we change, we can also choose how we will change.**

**21. Insight and understanding may initiate internal change, but both internal and external change needs to be addressed.**

The more you think about how much you missed out on, the more you miss now. When you stand up, your lap is a memory—it can be recreated, and if you continually have to return to it, it interferes with proceeding.

A client commented, “I wish there were some magical words you could fill me with so I didn’t feel bad.”

My gentle but firm response was, “There are. Stop searching for magic.”

**22. Growth and change involve their own mourning.**

You have to relinquish a past position in order to move ahead.

**23. The only familiar territory is behind you.**

Danish philosopher Soren Kierkegaard said, “Life can only be understood backwards, but it must be lived forwards.”

**24. Growth and change are hard. The only thing harder is not growing or changing.**

**25. Our experiences are always consistent with our theories.**

Most often we attempt change by changing our experiences, which often only produce new editions of the old experience.

**26. Clarify your external goals.**

Be certain there is a fit between your internal and external goals, that what you want to accomplish is consistent with your ideals. This consistency can provide an organizing structure and direction to your ambition.

**27. Anything important requires a commitment to go forward despite discomfort.**

A commitment is a decision you only have to make once—then you can direct your energy to fulfilling the commitment.

**28. Know what reaching a goal will do.**

Then you can distinguish clearly what it will not do. For example, reaching a goal will not undo the past, or make other troubles go away. Monetary wealth may bring many things, but it may not make your marriage better.

**29. You'll never do anything important that will feel comfortable in the beginning.**

Anxiety about the new and unfamiliar do not equate to the old anxiety coupled with danger, warning about the need to head to safety. This new anxiety can be a signal, an affirmation, that you are moving ahead to do things new and unknown.



**30. Trying to change your past is not change; it will always be the way it was.**

**31. Decisions always limit choices while activating others.**

**32. We suffer most from our anticipations and limit ourselves most by our assumptions.**

## **CREATING A VISION: SEE IT TO BELIEVE IT**

### ***The Art of a Vision***

A vision crystallizes possibility into a fundamental, articulated idea. A vision gives hope possibility—a shape and form—to program your future while at the same time rehearsing it. You program a message for success in your mind by creating the experience of having achieved it.

Proven guidelines include the following elements:

- You must construct your own vision.
- The criteria to measure success need to be clearly defined.
- Wanting to change, to be wealthy, or to be happy are all imprecise and abstract goals.
- Be specific, simple, concrete.
- Create positive terms for success.

Make your criteria in positive terms of what you want, what you will do.

Picture yourself as you have just succeeded at your goal at a specific time in the future, such as one year from now. Create this success experience specific to time, place, how you would experience yourself, and your body through all five senses. Hold the energy of the precise outcome you've just achieved, the goals met, and the feelings it brings. Imagine the details of the scene of your success inside and outside, engaging all senses, thoughts, feelings, and bodily experience along with details of the scene. For example, for a successful transaction, include the values and needs fulfilled, the money you have made from it, the details of what you are doing, such as shaking hands and ushering someone out of your office.

Carve out a few moments at the beginning and the end of each day to replay your vision. This vision *begins the experience and outline of a goal that you can strategically realize.*



# Section 2

## Transformation

Until you are willing to be confused about what you already know, what you know will never grow bigger or more useful.

*Milton Erickson*

We cannot solve the problems we have created with the same thinking that created them.

*Albert Einstein*

The way I see it, you can either run from it, or learn from it.

*Rafikki to Simba  
The Lion King*







# Module 4

## Master States of Mind

The present is not just something that comes  
after the past ...

it is what life is in leaving the past behind.

*John Dewey*

I don't want to get to the end of my life and realize  
that I just lived the length of it. I want to live the  
width of it as well.

*Diane Ackerman*







## **MODULE 4**

### **MASTER STATES OF MIND**

A state of mind is a psychophysiological state, an internally organized software program of expectations, attitudes, meanings, and feelings. Each state of mind has its own developmental history, its own set of experiences to filter and organize perception. Like each specific software program, a state of mind is a model that determines perception and processing, emotional tone and regulation, access to memory, and behavioral response patterns. From an infinite sea of stimuli, the unique software package of each state of mind determines what is relevant data, and once input, how processing occurs.

Within a particular state of mind we perceive, remember, feel, think, behave, and respond in a consistent mode.

Mastering state changes and regulating emotions—such as remaining calm in the face of danger—determines effectiveness. The chapter illustrates common difficulties that arise from mind states, and presents tools for their management; examples include writer’s block, sports slump, hot stock tips, and public speaking anxiety

You will learn how to exit one mindset and enter another. The module describes how to determine what state works best for specific endeavors, and how to access particular states of mind. Exercises facilitate getting centered in body experience and regulating states of mind.

#### **Workbook Tools:**

- *Regulating States of Mind*
- *A Structured Inquiry to Recognize Feelings*
- *A Grounding and Centering Exercise*
- *A Brief On-Your-Feet Grounding Exercise*

## **REGULATING STATES OF MIND**

We enter into and exit from states of mind fluidly and invisibly, like the precision passage of the baton between relay team members. Our familiar repertoire can range from creative energization and quiet happiness through anxiety or boredom to relaxation. More extreme, reluctantly inhabited states exist for some: Depression, nothingness, deadness, emptiness, and confusion. Feelings, the subjective experience of distinct emotions, are a component of each state of mind.

Within a particular state of mind we perceive, remember, feel, think, behave, and respond in a consistent mode

The regulation of feelings and states of mind involves the understanding and mastery of access to a particular state of mind without altering consciousness to do so (i.e., while “staying present”).

Each of us has a continuum of states, with some awareness of what state works best for what endeavor, even of how to enter into and exit from different states. We become more or less cognizant of which state to enter for a creative endeavor, which state to enter for conceptual planning, and what state of attention and concentration works best for each task from the alertness of business endeavors to relaxation for sleep.

**What does it mean to get centered in your body and experience?** With specific focus on attunement to present experience and state of mind, connection of mind and body results. If you feel detached or not grounded in your body or experience, focus awareness on very specific details of your physical body, including breathing and relaxation.

Grounding yourself in your body allows you to center inside your experience and attain a fully “present” state of mind. This grounding and centering creates a sense of being relaxed yet alert, focused but not tense. The “present” state of mind allows full access to all aspects of experience, especially self-awareness and attunement.



## **HOW DO YOU FEEL?**

### ***A Structured Inquiry To Recognize Feelings***

When someone asks, “How do you feel?” or when you ask yourself, “What am I feeling?” the answer may not always be obvious. Since a feeling usually cues a state of mind, is it crucial to first identify feelings—not always an obvious task.

We have to name our world in order to live in it, to identify experience and name our feelings in order to reside inside them.

**In order to be aware of a feeling, the following steps are necessary.**

1. First take an internal point of reference – to perceive from inside your own experience. This centering may not be easy if you are accustomed to focusing on others and being attuned to their feelings.
2. Register emotion from an internal perspective, a mind-body awareness.
3. Recognize and distinguish specific feeling (the subjective awareness of emotion).
4. Accurately label the feeling.
5. Once experienced, distinguished, and labeled, a feeling can be mastered and communicated.

This stepwise process of registering, distinguishing, and communicating feelings may be more difficult if you are accustomed to discharging emotion by action rather than understanding by reflection. Action sequences may be useful to regulate tension (such as exercise) or may mask feelings (such as excessive drinking or eating, or compulsive activity).

## **GROUNDING AND CENTERING EXERCISE**

1. Ask yourself: “How present am I?”
2. Go through a systematic review of your body and perceptions from it: feeling, perceiving, and moving each aspect of your body from toes to head.
3. Make a systematic inventory each of your senses:
  - Seeing
  - Hearing
  - Touching
  - Tasting
  - Smelling
4. Attune specifically to aspects of body function that may be calming: Focus on and control of breathing, tensing and relaxing various muscle groups, alignment of body posture
5. Progressive Relaxation: Sit in a comfortable chair and close your eyes. Clear your mind. Focus only on your immediate bodily experience. Begin feeling the sensation of relaxation.
  - Take a deep breath.
  - Breathe in relaxation. Breathe out tension.
  - Focus entirely on your feet and toes; relax them completely.
  - Let the relaxation move into your calves. Then to your thighs. Notice the warm, heavy, comfortable sensation.
  - Let the relaxation move into your hips. Then to your abdomen. Then to your chest. Notice the relaxed, soft feeling of your muscles, and the deeper breathing.
  - Let the relaxation travel up your neck into your face. Then to your scalp. Then to your brain.



- Be aware of even deeper breathing. Continue to breathe in relaxation, and breathe out tension until your entire body is in a relaxed state.
- Decide when to stop the exercise. Allow a moment of transition to a fully alert state.
- You will remember this experience in your body and mind and will be able to access it more quickly each time.

## ***A BRIEF, ON-YOUR-FEET GROUNDING EXERCISE***

- Focus attention on your body.
- Evenly balance your weight and posture.
- Relax arms, legs, shoulders.
- Breathe evenly and deeply.
- Relax jaw, tongue, face.
- Eyes look forward, aware of all fields of vision, including periphery.
- Rub your feet on the carpet.
- If possible, jump up and down in place a few times.



## **CHOICE ENHANCEMENT**

The following considerations apply to emotions and choices:

- Increased tension produces emotional regression. With increased tension and advanced conflict, the stress response reaction can move someone into a more emotional pattern characteristic of a much earlier age. (“I must be doing something wrong. All the things I know to do aren’t working.”)
- Increased emotion narrows perspective. (“I’m so preoccupied with my portfolio losing value, it’s hard to focus on my work.”) When emotion prevails, focus becomes narrower and more restricted to the most recent event. Paradoxically, attempting to use reason and logic with an escalated individual—someone in a highly emotional state—deepens the automatic alarm pattern. The escalated individual will further escalate, dig in his toes, and spiral into more extreme responses, hurling himself away from logic.

Remember: When you’re in a state of upset, the first order of business is to regulate feelings. Get centered and grounded.

Anxiety is an energy experience. The most effective antidote to anxiety is grounding yourself—transforming the energy by becoming present.

Being grounded and centered allows a state of mind for optimum synthesis of thinking with access to existing knowledge. Stress interferes by catapulting someone into a state of mind that narrows concentration and limits the scope and range of thinking. The stress hormones of epinephrine and cortisol block information processing.

When you’re relaxed and centered, you have the greatest access to all of your states of mind—all the information you possess. The antidote of purposeful relaxation extends energy reserves. After a period of relaxation, attention and concentration improve.

Managing energy is a key to success. This begins with knowing your strengths and limitations, your biological cycles, when you perform best.

- Know how to enter and exit various states of mind—and which works best for a particular task. For instance, writing and editing are two different states of mind—to be done at two different times.

- Cluster activities that require the same state of mind.
- Identify what enhances your energy: anticipation, creativity, pleasure, meditation, prayer.
- Identify what depletes your energy: toxic people or situations; negative mindset; lack of focus.



# Module 5

## Advancing Your New Plot

It is okay to think about what you want to do. Until it is time to start doing what you were meant to do.

*The Rookie*

If I were to wish for anything, I should not wish for wealth and power, but for the passionate sense of what can be, for the I, which, ever young and ardent, to seize the possible. Pleasure disappoints, possibility never. And what wine is so sparkling, what so fragrant, what so intoxicating as possibility?

*Soren Kierkegaard, Either/Or*

And one ought to consider that there is nothing more difficult to pull off, more chancy to succeed in, or more dangerous to manage, than the introduction of a new order of things.

*Niccolo Machiavelli, The Prince*







## **MODULE 5**

### **ADVANCING YOUR NEW PLOT**

A self-statement is a unique, personal communication of experience and point of view. What people say and do are inevitable, unavoidable self-statements of their beliefs and personal reality. Individuals actively construct their experiences. Narrative and plot reflects individual assumptions and self-concept.

The module illuminates how to listen for, own, and learn from one's self-statements, including an exercise to edit and enhance choices.

Adopting an internal point of reference--being one's own authority—involves developing principles (the adult version of rules) and living up to one's own ideals (the way to generate authentic self esteem).

Individuals take ownership of their own authority by claiming action. To move from a passive role to an active one anchors personal authority. Examples include when people regard themselves as the victims rather than creators of their narrative (“My anger got the best of me.” “My thoughts ran wild.”)—as if the story has taken over the author.

This module guides you to create a new story with a cohesive plot so powerful it can craft a new identity.

#### **Workbook tools:**

- *15 Caveats on Being Your Own Authority*
- *An Exercise in Authoring Your Own Reality*
- *Review and Revise Belief Systems*
- *Making Choices: Inquiries for Beginning a New Story*
- *An Exercise to Structure Positive Focus*

## **15 CAVEATS ON BEING YOUR OWN AUTHORITY**

1. Each day is a new and blank page. You create whatever you choose this day.
2. You choose what you perceive.
3. You choose how you process what you perceive, the meaning that you attach.
4. You choose the behavior from the belief that you have created.
5. Focusing on the present moment, with specific, tangible, current goals synthesizes past, present, and future into this moment.
6. You create what you expect. If you focus each night on three positive things you did during the day, and then on how you can improve and expand those three things, you will be right. If you focus on three negative things, even implicitly by default assumptions that seem automatic and continuous, you will also be right. (Remember, a placebo is a fiction that creates a truth).
7. A mistake or bad experience is a failure only if you do not learn from it. Whatever happened or did not happen during the day, however bad or overwhelming, will end in a positive way when you focus on your specific achievements at the end of the day and how you may further them.
8. After you choose a vision and goals, intentional choice begins. There is more than one path to your goals; the paths are as variable as your creativity.
9. Goal and agreements are complementary. Goal is what you shoot for, a target. Agreement is a promise you make to yourself or another. Know your agreements consciously and be loyal to them; a deal is a deal, especially with your self.
10. Changing a habit that doesn't work allows you to apply the energy to a conscious goal.
11. It is the process of looking to someone or something else to fill what is missing that creates something missing.



12. If someone else chooses your boundaries, they become restrictions; if you choose them yourself, they become principles.
13. Both conformity and opposition occupy the same prison.
14. A true freedom is not requiring someone else to respond in a particular way in order for you to proceed, or to be happy.
15. That which you can imagine and believe can be achieved. You become what you believe yourself to be.

To the extent that you focus on the responses of others, and leave out your own subjective experience, you abandon yourself. If you rely on others for your needs you may create a dependency that deprives you of the pleasure of effectiveness and mastery. And compliments never help if you don't believe them. To become the hero of your own story requires establishing an internal ideal and living up to it—being your own authority.

Taking care of yourself is a confrontation and acknowledgement that no one is taking care of you. One way to resist actively taking care of yourself is by maintaining an addiction—the illusion that some substance, thing, or person will be an answer and provide what is missing.

- Do you hope or pray for magic, or the ability to master?
- Do you hope or pray for being guided, for understanding the walk you're on and your own determination of the steps and the destination?
- Do you hope or pray to have the symptom taken away or to discern your body's message?

## AN EXERCISE IN AUTHORIZING YOUR OWN REALITY

**What would it be like:**

*If you registered judgment or criticism from others as their self-statement?*

*If you were free to be who you really are?*

*If no one has any control over you?*

*If you do not try to control anyone else?*

*If you put all of your energy into doing only what you can determine?*

*If you weren't afraid of expressing your dreams?*

*If you weren't afraid of saying what you really want to say?*

*To do what you really want to do?*

*To do what you most enjoy doing?*

*To know exactly what you want and what you don't want?*

*To get rid of the things you don't want in your life?*

*To ask exactly for what you need?*

*To not worry what anyone else thinks about you?*

*To not attempt to determine anyone's opinion about you?*

*To live your life without judging others?*

*To let go of judgments and criticisms that you have of yourself?*

*To let go of judgments and criticisms you have about others?*

*To not paint someone else as wrong or at fault?*

*To not have to be right or win?*

*To not have to work at acceptance?*

*To not be afraid of rejection or abandonment?*



## **REVIEW AND REVISE BELIEF SYSTEMS**

### ***Passive Position to Active Intention***

We author the stories that then seem to shape our lives. Like so many other processes in our lives, we inadvertently reverse cause and effect. The feeling we originate may then seem to target its creator: “My anger made me respond in a foolish way.” In dreams, as with symptoms, cause and effect interchange: The author of the dream and the creator of the symptom behave as if what they made is instead happening to them. It is as if the story takes over its writer.

Until beliefs are addressed, internal change and behavioral change will not occur. Beliefs can either limit or facilitate change. We have an attachment to hang onto things the way they are, meaning to continue without change the way we are.

Various language content and patterns reveal underlying assumptions about the map, the plot of your story. These assumptions may facilitate or impede progress. Language reveals internal versus external point of reference, internal versus external authority, active versus passive position.

### ***External Authority Phrases***

**Pressure words reveal an external point of reference, assuming an external authority.**

- *Should*
- *Have to*
- *Need to*
- *Must*

### **Limitation Words**

- *Cannot*
- *Impossible*
- *Should not*
- *Something stopped me*

### **Passive Positions**

- *The feeling took over*
- *Anger seized me*
- *Doubt crept into my mind*

- *The impulse seized me*
- *A part of me resisted working*
- *I came to an impasse*
- *Suicide entered my mind*
- *My mind played tricks on me*
- *I found myself doing that*

Creating and writing your own story involve recognizing that the story has not been ghost-written from the past, as if someone or something (parents, critical others, fate) were handing you the lines in a script.

We structure our language around belief systems. For example, a cause-effect belief is that if something causes this, then the result will be this. For example, “I have to do all of these things before I can actually begin.” Or, “If I do this for him, then surely he will want to do this for me.” The most extreme cause-effect dilemma was from a mother of a boyhood friend, who told him, “You can’t go into the water before you know how to swim.”

An example of the coupling of two unrelated things can become, “I won’t do this because I don’t have the experience,” or “I will do this after I lose twenty pounds,” or “I’ll enjoy myself when I retire/get my life in order/do these tasks.”

These language patterns are evidence of putting one’s life on hold and creating a belief that limits

When a belief is in place, to its creator it seems logical. The belief, “If I go forward, then something bad will happen,” would make continuing appear foolish. Money and weight are two areas to specifically challenge belief patterns. Beliefs that may have served us well at a different time, such as earlier in life, in adolescence or childhood, may simply no longer work or may be outdated, tailor-made for an earlier context but no longer a good fit.

**To challenge a belief, consider the following:**

- What could I do if this assumption were not in place?
- What belief would serve me better?
- What can I shift that belief to?



- Am I capable of having this limiting belief hold me back?
- Have I outgrown this belief?
- Have I discovered this belief is not true?

## **MAKING CHOICES:**

### **INQUIRIES FOR BEGINNING A NEW STORY**

The following queries focus awareness on how you choose.

- Reflect on what changes in your life you can make independently.
- Consider which changes you need to make collaboratively (such as with a spouse, a business partner, boss, executive team).
- Recognize when you should let someone else make the final decision (such as a spouse or a boss).
- Identify what you can and what you can't determine. Put all of your energy in what you can determine. Accept what you can't determine.
- Get rid of the things that you don't want. Let past mistakes teach you, then let go of them.
- Every increment of behavior, such as each bite of food you take, is a separate choice. Do you like your choices? Every choice you make affects now and tomorrow in some way.
- What accomplishment, if completed within a week, would produce significant movement or impact? Are you willing to do it?
- What accomplishment, if completed within a month, would produce significant movement or impact? Are you willing to do it?
- What accomplishment, if completed within a year, would produce significant movement or impact? Are you willing to do it?



## ***AN EXERCISE TO STRUCTURE POSITIVE FOCUS***

**The following is an exercise to bring positive focus as well as structure to your life one day at a time. This exercise transforms each 24-hour segment of your life into a unit of positive learning experience.**

- Schedule a time just for yourself, such as a brief time-out at the end of the day, to reflect on three achievements for that day. These achievements may be about business or personal life.
- Write down the three achievements. Examine them to determine why they were important, why and how each of the three was significant to you for that day.
- Explore how you could make more progress in each of the three areas.
- Then for each of the three achievements write down ways that you could make more progress.
- Write down the specific actions or behaviors you would take in each of the three areas to further progress.
- Review the three areas and actions taken the next day at the designated time.

One of the original architects of the coaching process, Dan Sullivan, constructs a 21-day program of doing a version of these essential exercises each day for twenty-one days, believing that it takes that long for a habit to form. This process also integrates the immediate past (24 hours), the present moment of what you feel is important, and sets up the next day in a positive and framed way to create a structure and an immediate game plan. Each day clarifies and self-reinforces confidence of achievement. Whatever the motivation, understanding, insight, or plan, success depends on actual behaviors, on actions that in the short and long term lead to success. In his research, Dan Sullivan found that successful people are successful because of their habits—the default mode of behaviors that become automatic. A habit is simply a behavior repeated automatically, a procedural memory of incorporated routine. Twenty-one days is the period of time required for a habit to get established and become the default mode.

Develop clarity about exactly what you want, the reality you want to materialize. Write it down to place it where you will see it each day. In doing this, you orient your mind and focus your energy in the direction you want to go.

Bad habits and nonbeneficial behaviors operate on the same principle: A behavior becomes automatic by repeating it daily in as little as three weeks. This exercise of focus on specific, positive, habitual behavior replaces maladaptive patterns with adaptive ones to make them automatic.

**Identify bad habits and nonbeneficial behavior.**

- Reframe the behavior to positive, beneficial results.
- Examine specific progress in each of the areas of behavior that can be affected presently.
- Consistently repeat the behavior daily for three weeks.
- Carve out a daily period of time specifically and consistently set aside just for you to review the most salient aspects of your day.
- Be loyal to yourself by honoring this time.
- Write down the achievements and the action for proceeding in future.

This process brings into focus automatic behaviors, and the assumptions and motivations that bring about behavior. For example, by sharply focusing on procrastination, you can discern avoidance (reframe into a specific time goal), inadequate preparation to begin (prepare and initiate), and decision to not do something (disengage altogether and engage what you do want). Plans, structure, behavior, and actions should all further your goals.



# Section 3

## Success Application

Once you know exactly what you want, the entire world conspires to give it to you.

*Madonna*

Trust your heart, especially when it is a strong one. Never contradict it, for usually it can predict the things that matter most: it is a homegrown oracle.

*Baltasar Gracian*  
*The Art of Worldly Wisdom*





# Module 6

## Your New Money Story®

You will never let yourself have more money  
than you think you are worth.

*Zig Ziglar*

If you put a small value on yourself, rest assured that  
the world will not raise your price.

*Anonymous*







## **MODULE 6**

### ***A. Your New Money Story®***

What money means to people, what it says to them, and what they say with it constitute their money stories. A money story is a large part of a life story. Each person's unique relationship with money is complicated, because some of the most important aspects of it are emotional, even unspoken and unconscious. Some money issues are really about money, while many are about other matters, private or even secret, made palpable by money. For example, intelligent people spend money they don't have. Sophisticated people scheme and get scammed. Reasonable people forego leisure time to purchase money with their time and energy in order to buy back some of what they forfeited. Gifted people can't exchange their talent for proportionate income. Otherwise balanced individuals spend extravagantly or hoard compulsively. Reliable people ignore financial matters until they snowball. People with integrity write their own exceptions to rules about money. How can money make intelligent, sophisticated, reasonable, talented, dependable, ethical people act so goofy at times? And how can they keep on writing the same money stories that imprison them?

Money's language speaks self-statements. A self-statement is a unique, personal communication of your experience and point of view. What you do and say are ubiquitous, unavoidable self-statements of your beliefs and personal reality. Three people stand shoulder to shoulder and observe the same event, yet each of their stories of the event will be different. The three stories comprise self-statements of each individual's perspective from unique life experiences.

Money can make any statement, carry any message, and represent any notion. Money language conveys messages that sometimes are invisible to the speaker yet quite decipherable to observers.

This module helps you understand the emotional elements encrypted in money language and communicated in money behavior. You will learn how to understand and revise your own money story as a strategic, informed component of a life story.

**Workbook Tools:**

- *A Money Quiz and Discussion*
- *Can You Make and Enjoy Money?*
- *An 11-Step Exercise for Awareness of Your Money Story*
- *Your Money Mission Statement*
- *7 Techniques to Plot a New Money Story®*



## ***YOUR NEW MONEY STORY®***

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## A MONEY QUIZ

At several business seminars and presentations I passed out an index card and asked each person in the audience to write, anonymously, a single answer to each of three questions.

**Here are the three questions:**

1. *To me money means \_\_\_\_\_.*
2. *My current annual income is \_\_\_\_\_.*
3. *In order to ensure happiness and contentment financially, with no more money problems and worries, my annual income would need to be \_\_\_\_\_.*

I suggest that you pause here before continuing in order to reflect on your own answers to these three questions. The subsequent elaboration may have considerably more meaning if it begins with your own experience of your three answers.



## ***MONEY QUIZ DISCUSSION***

**Statement 1.** The range of answers suggests how much individuals attribute to money. Money provides a window of opportunity through which one may see hope, happiness, freedom, or security. Yet as any of us get closer to the “glass,” money becomes a mirror reflecting a desired or disavowed self. Self-statements made with money glare back at us to regulate mood, prove worth, keep score, affirm accomplishment, channel aggression, form attachments, or foster alliances.

Money enters into every aspect of life, a force and energy to be reckoned with daily. Money, as an emblem of feelings and significance, is one of the most emotionally charged objects in contemporary life. Always designed to be a symbol, money stands for what you idealize or want, fear or lack, feel you don’t deserve or can’t have.

**Statements 2 and 3.** More than 90% of the many hundreds of people I polled thought their annual income would need to be about twice its current level for them to feel happy and free from money worries. Someone who makes \$50,000 a year believes it would take roughly \$100,000 a year in order for him to be financially content. Someone who makes \$500,000 believes that the figure would be about \$1million a year. And, in discussions after this poll, individuals whose income had actually doubled at some time also doubled their “happy and content” amount. When those who made \$50,000 achieved their \$100,000 goal, they then thought it would take about \$200,000 to be content and worry-free about money.

## **BELIEFS GHOSTWRITING YOUR MONEY STORY**

We earlier looked at the question, “How much money do I need to be happy and content?” Now let’s look at a related question: What is the greatest annual income you can reasonably *expect to earn*?

This isn’t meant to be theoretical, as in, what *anyone* can expect to earn. The question is about *you*, personally and individually. And not if you suddenly won the lottery, or quit your job and in a fit of inspiration created the next Google, but what you can *reasonably* expect.

To get the most out of this exercise, answer the question with a specific dollar amount *before* you continue.

What is the greatest annual income I can reasonably expect to earn?

\$ \_\_\_\_\_

Now, let’s take a close look at that answer. Why is that the number you chose?

Do you know of anyone who earns more than that? There are people who earn many times the number you wrote? But there are hundreds of thousands of people in the world who are who are no more intelligent, gifted or born to advantage than you are, who have created large fortunes.

The question, then, is this: where did that “reasonable expectation” come from? From your story. In fact, this might be a more accurate way to ask that question:

What is the greatest annual income my money story will allow me to have?

\$ \_\_\_\_\_

You will be right about your assumption, whatever it is, because you live your life according to the script. You will let yourself make and keep only the money you think you’re worth. Your belief system contains what is inevitable. Without awareness and ownership of your money story, the only way to exert any mastery over a limiting assumption is to determine how and when the inevitable will happen, and then bring it about by your own hand.

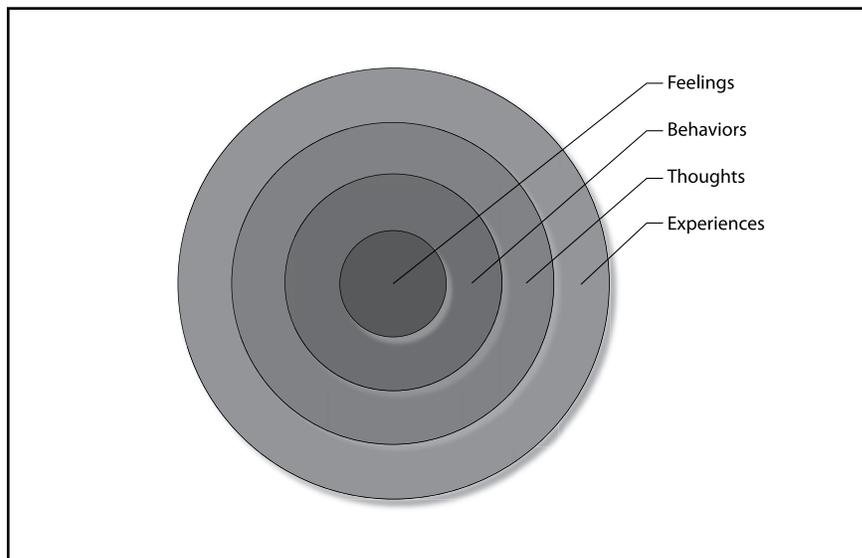


## THE ANATOMY OF A MONEY STORY

To understand why we typically don't know our money stories, it's helpful to understand how we put them together in the first place. There are four distinct layers to a money story, each quite different from the others.

- 1) *Feelings: our gut reactions connected with the strivings, emotional attributions, beliefs about, and representations of money in our lives and the world around us;*
- 2) *Behaviors: the things we do for and with money;*
- 3) *Thoughts: how and what we think about money and its symbolism;*
- 4) *Experiences: our overall reactions and responses to money, its significance and meanings in our lives.*

CHART: Anatomy of a Money Story



Draw three concentric circles, with FEELINGS in the center like a bulls-eye, followed by BEHAVIORS, then THOUGHTS, and finally EXPERIENCES as the outermost region lying outside the circles.

Fill them in with your own meanings for each—the first three words or phrases that come to mind in each of the four areas.

### Feelings

We make money decisions based on underlying feelings, which give money

its emotional meaning to us; over time those money meanings crystallize into our beliefs about money.

Money can stir deep feelings of anger, resentment, admiration, compassion, lust, hostility—the entire spectrum of human emotion is a magnet for the symbolic potency of money. Of the four layers of story, feelings are the deepest; they form the core of our money story.

### Behaviors

Our behaviors are the clearest windows to our true beliefs about money. Unlike the hidden, internal world of our feelings, our actions are clearly visible. Our behaviors represent the secret language of money at its most readable and *least* secretive. What we *say* we believe is one thing; what we *think* we believe may be yet another. What we *actually* do is the clearest expression of what we really do believe.

### Thoughts

We don't often think logically or even consciously about our true money beliefs, but we do think about our money behaviors—at least, sometimes. However, our thoughts are not usually central to the process (even when we believe otherwise). We tend to buy emotionally and *then* justify rationally, not the other way around. In other words, thoughts follow after the fact.

Thoughts are what we tell ourselves the story means, not necessarily what it really means. Like any “official” history of events made up after the fact, the story we tell ourselves is often a whitewashed version of what really happened. And this logical explanation often drives the real story underground.

### Experiences

The various elements of our encounters with money all combine together to create an overall experience, which becomes what, to us, money *means*.

The experience surrounding money in its entire dimension, including our money behaviors, the feelings and beliefs that drive them and the thoughts, opinions and rationalizations that we have about them, all comprise what in time becomes the substance of our money story.



## ***CAN YOU MAKE AND ENJOY MONEY?***

**Mark the following items true or false.**

- Talking about money, even with my family, feels embarrassing and seems taboo.
- I go on spending sprees I can't afford.
- I seem to consistently lose money on investments.
- I feel afraid and paralyzed about investing my money.
- I don't seem to be taking the initiative to learn more about managing money or investing, and I still rely on other people to make decisions for me, even though they're not experts.
- You've got to step on other people to really make money.
- I need to have money in the bank to feel "real."
- No matter how much money I have, I always want more.
- I use money to gain love and admiration, to compete with others, to show off my prosperity, or to gain revenge.
- I grew up poor, and although I'm doing all right now, I still feel poor and insecure.
- I have difficulty admitting my mistakes and cutting my losses.
- I'm pretending to be content with my financial status only because I'm afraid to make any changes.

If you answered true to any of these questions, you're probably having some difficulty gaining, managing, or enjoying money. No matter what you earn, old perceptions may persist because the questions are about your feelings and assumptions. Feelings are at least as real as dollars. Rich and poor are both states of mind.

## EXERCISES FOR AWARENESS OF YOUR MONEY STORY

The assumptions and beliefs that determine your money story deserve full attention. These exercises will illuminate invisible decisions camouflaged as beliefs and assumptions.

### MONEY MEMORIES

Spend a few minutes writing anything and everything that comes to mind about your childhood experiences, fantasies, attitudes, and ideas regarding money.

As you were growing up, what notions were presented to you regarding money, its use, and its importance? \_\_\_\_\_

\_\_\_\_\_

Were the principles presented to you consistent with what you saw your parents doing? \_\_\_\_\_

\_\_\_\_\_

How did your parents behave with money? \_\_\_\_\_

\_\_\_\_\_

How did they regard those who had less money than they did? \_\_\_\_\_

\_\_\_\_\_

How did they regard those who had more money than they did? \_\_\_\_\_

\_\_\_\_\_



## **MONEY MEANINGS**

Spend a few minutes writing every word, phrase, image, feeling, and experience that the word “money” brings to mind.

Write about what you use money to express or do:

- For yourself \_\_\_\_\_  
\_\_\_\_\_
- For (or to) others \_\_\_\_\_  
\_\_\_\_\_
- As reward for obedience or performance \_\_\_\_\_  
\_\_\_\_\_
- To enhance growth \_\_\_\_\_  
\_\_\_\_\_
- To create opportunity \_\_\_\_\_  
\_\_\_\_\_
- For control (such as buying for others what you really want yourself)  
\_\_\_\_\_
- For punishment by withholding \_\_\_\_\_  
\_\_\_\_\_
- To manipulate behaviors or attachments? \_\_\_\_\_

What are your current beliefs about money and your attachment to it?

Some examples of beliefs:

- *People who have considerable money are lucky;*
- *People get money when and if they deserve it;*
- *Wealth and spirituality are mutually exclusive;*
- *People of wealth are different;*
- *It's difficult to make a living in this economy.*



## **MONEY MATURITY**

Be empathic with yourself rather than judgmental or critical. The observations can become reference points for what to keep, enhance, avoid, or let go.

How open are you about money details with your children? \_\_\_\_\_

\_\_\_\_\_

How fully and honestly do you speak with your spouse or partner about money, finances, spending, goals, savings, and debt? \_\_\_\_\_

\_\_\_\_\_

Step outside yourself and become your own mentor. Write the most important things you currently observe about money and your money story.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Does your current financial picture allow you to use your ability to achieve your personal mission? Professional mission? \_\_\_\_\_

\_\_\_\_\_

Do you have a money mission statement? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## A DEBT QUIZ

Answer each of the following questions with a Yes or No, circling the scoring number in the corresponding column. For the first ten questions, each “No” scores 5 points, and each “Yes” scores *minus* 5. The next two questions are each worth 10 points, and the last is worth 20. When you’ve answered all the questions and circled all your points, add up your total score.

	<u>Yes</u>	<u>No</u>
1) Do you routinely make minimum payments on credit card balances?	<u>-5</u>	<u>5</u>
2) Are the balances on your credit card statements gradually increasing every month?	<u>-5</u>	<u>5</u>
3) Do you have a balance on one or more cards of more than 50 percent of the credit limit for that card?	<u>-5</u>	<u>5</u>
4) Do you often use cash advances on your credit cards to pay other bills?	<u>-5</u>	<u>5</u>
5) Do you routinely “play the float” on cards (juggle payments between cards) in order to pay bills?	<u>-5</u>	<u>5</u>
6) Do you regularly have past due bills, rent or mortgage payments?	<u>-5</u>	<u>5</u>
7) Do you have little or no savings?	<u>-5</u>	<u>5</u>
8) Have you been denied credit or had a credit card purchase declined during the last quarter?	<u>-5</u>	<u>5</u>
9) Have you had one or more checks bounce during the last quarter?	<u>-5</u>	<u>5</u>
10) Have you had one or more notices or phone calls from a collection agency in last quarter?	<u>-5</u>	<u>5</u>
11) Do you ever hide, misrepresent or neglect to mention a debt to your spouse or other family member?	<u>-10</u>	<u>10</u>



12) Do you ever hide a bill or credit card statement from your spouse or other family member?	-10	10
13) Are you unable to state, offhand and without sitting down to go through your records, the exact total amount of money you presently owe?	-20	20
TOTAL SCORE	—	—

Possible scores range from 90, a perfect score, suggesting you have no significant problem with debt, to *minus* 90. Obviously, the lower your score, the more likely you are to some extent caught in the debt cycle. Truthfully, though, if you answer *any* of these questions with an immediate “yes,” then there is probably at least some material in this chapter that has special meaning for you.

What is the solution? How does one escape from this vicious cycle? Because the entire sequence depends on playing “let’s play pretend,” relief starts by saying “no more games” and coming clean with the truth.

## **YOUR MONEY MISSION STATEMENT**

Analogous to a business mission statement, a money mission statement proclaims the meaning, use, value, and purpose of money to you, including short and long term plans.

**Here are some questions to ask as you fashion your money mission statement:**

- What are the central themes of your current money story?
- What do you want the central themes of your new money story to be?
- What matters most?
- Are your needs and values in harmony with your goals and strategy regarding money?
- What do you want money to mean to you?
- How will you use money?
- How will you not use money?
- What relative value will money have in your life?
- What purposes will money have on your life story?
- What is your plan for acquiring the money you need now?
- What is your plan for acquiring the money you need for your children's education?
- What is your plan for acquiring the money you need for retirement?



## **7 TECHNIQUES TO PLOT A NEW MONEY STORY®**

### **1. Focus on the plot of your money story and the basic assumptions creating the storylines.**

Assessment begins with recognizing that you are the author of your money story, just as you are the author of your life story. Take ownership of your experience. It does not just happen, even though it may seem that way.

Your experiences become consistent with your theories. You loyally align with the central theme, the plot, of your life. You perceive and process according to that plot, and any departure, even temporary, creates uncertainty. Developing a new story generates anxiety of the unfamiliar. The easiest and fastest way to end this uncertainty is to go back to the comfortable, but limiting, old story.

Examine your beliefs and assumptions creating the storylines for each recurring money problem, as well as for each financial success. Problems and successes both exist when you create them. And both are lessons.

For each obstacle, look for its core assumption. For example, if you feel you have been treated unfairly in a business deal, did you silently hope that someone in authority would take care of you? Use the situation as a lesson to take better care of yourself. Recognize that there is no ultimate arbiter of fairness.

Are you susceptible to a good investment story? Do you want to buy a promise of fulfilling your hope, rather than assessing the purchase with the same research you would in purchasing a computer or refrigerator?

### **2. Assess the money storylines that work and those that do not.**

Regardless of intent or motivation, promise or possibility, the bottom line is always,

***“Does it work now?”***

Do your recurring obstacles share a common theme, such as goals not aligned with needs and values? Or do you hear the story you want to believe?

Core assumptions form the basic beliefs about yourself. Organizing, powerful, and influential, they fashion the storylines of your life. The more you try to disregard, disavow, or counter them, the more intense their influence becomes. These beliefs are not “just there.” You create them. Your behavior best indicates your beliefs and values.

What patterns do you see in your handling of finances?

### 3. Recognize passive versus active positions regarding money.

Words reveal an internal model. Listen for explicit language reflecting a passive or active position, and for an internal or external point of reference.

Active language reflects an active position and ownership of initiative. Rather than “I’ll try,” active language says “I will.”

Passive language arises from beliefs about fate, luck, destiny, victimhood, entitlement, or hope. The language of this position makes the creator both subject and victim: “My fear took over.” “The market beat me up this week.”

Pressure words indicate an external point of reference rather than internal authority: should, have to, ought to, need to, or must.

Limitation words reveal the assumption of constraint: impossible, can’t, shouldn’t.

Nonspecific actions and nouns generalize and universalize experiences rather than create a specific focus and action potential. “I came to an impasse.” “My mind played tricks on me.”

Abstract goals impede precise strategy. Attitudes of wanting to be happy, to change, or to be comfortable with money defy goal planning and strategy.

Your language will both reflect and facilitate ownership of your story to become your own authority.

### 4. Assess what you want to change.

Change begins when you recognize that you author your own story. If a problem recurs, rather than simply getting over it, countering it, or adapting to it: It is not there until you create it.



**5. Determine what you want to let go.**

In order to change, you first have to know what you want to let go. The bottom line, no matter how entrenched the process or strong the hope, is “Does it work?” Unfulfilled hope—what might have been—becomes the most difficult goodbye. You are never more aware of what you’ve missed in the past than when you give it to yourself now.

**6. Know what you want to avoid?**

The pull of the old and the fear of the new exist side by side. Yet there is no future in repetition.

Recognize what you can and can’t determine. Disengage the impossible, especially trying to change another person. Avoid involvement in nonproductive, energy-draining struggles, such as arguments: What is the sound of one hand clapping?

**7. Clarify what you want to enhance?**

Your money story, like your life, manifests your beliefs.

Changing your mind changes your life, as beliefs, goals, and visions drive action. Choose carefully what you engage. Your money story and your life story should be mutually enhancing. Both share the same text: What is really important?

## 7 GUIDELINES FOR ESTABLISHING A HEALTHY MONEY STORY

### 1. Remember that money is money.

Owing money does not “mean” anything about you or your value as a person, just as having a lot of money does not mean anything about who you are as a person. It’s only money. Let go of whatever complexity and emotional drama you have attached to your money, your spending, your debts, your possessions, your net worth, and all the rest. As crucial as it is that you deal with it responsibly and consciously, remember that it is only money.

A firm grasp of this fundamental principle—“Money is simply money”—is the foundation of all sound financial decisions and behaviors.

### 2. Understand that internal satisfaction can transcend money.

Money means less when true inner peace exists; it becomes a simple medium of exchange, free from complex meanings or hopes of enhanced self-worth.

We live in a society that tends to equate “success” with financial prowess. But many forms of success have no relationship at all to financial success. The most genuinely successful people typically find work in an area they enjoy and that is intrinsically motivating, and their financial success is in essence a byproduct of that larger *life* success.

The German poet and philosopher Johann Goethe, when asked for the secret of life, replied, “The secret of life is living.”

### 3. Know that there’s also nothing wrong with money.

Be careful not to idealize poverty and rationalize the lack of success as somehow nobler than wealth. Money bestows on the possessor many choices not otherwise available. As Albert Camus put it, “It is a kind of spiritual snobbery that makes people think they can be happy without money.”



**4. Learn how to balance money for today with money for tomorrow.**

Money can be used constructively to enhance enjoyment and satisfaction in life. These joys should be balanced with the accumulation of money for future security.

**5) Create a financial plan that reflects your values and priorities.**

If you don't know where you're going, any map will do. Money problems arise from falling prey to easy credit availability, but we only fall prey to easy credit when we lack a clear larger plan.

A financial plan doesn't have to be complicated; in fact it's better if it's not. Identify your priorities in life, create the financial goals that support those priorities, and chart a path to get there.

**6. Seek out suggestions and advice from an expert.**

The decision to seek consultation from people knowledgeable in specific areas is logically sound but emotionally difficult. Consulting someone who will mirror and agree with your own opinions is far easier than listening objectively to critical or contradictory information without responding defensively or remaining stubbornly attached to your original position.

The point of consulting an expert is not to follow their advice and wholly abandon your own perspective, but to maintain your own viewpoint while staying open to what you can learn from the expert, and then using this new information to form a flexible and better-informed position.

**7. Go on a media diet.**

The media is remarkably effective at fanning the flames of compulsive spending. The message the media gives you generally goes something like this: *You are overweight, unfit, unattractive, your life is boring, you're in incredible danger, you may even smell bad—and the solutions to all these problems are just a purchase away.*

Start noticing the choices you make, including what you buy and consume, based on what television, magazines and other media tell you. Seek out one specific media source each week that you disagree with or dislike.

Experience the difference from your previous perception.

Start making your media choices conscious; exercise your prerogative to watch, read and listen to only those specific media resources that you choose, and savor them well.

Fasting is good for the soul: consider giving yourself one fully media-free day per week.



# Module 7

## Your New Career Story

You need people who can tell you what you don't want to hear.

*Robert De Niro*

The two things that people want more than sex or money are recognition and praise.

*Mary Kay Ash*

We will either find a way, or make one.

*Hannibal 47-183 B.C.*







## **MODULE 7**

### **YOUR NEW CAREER STORY**

The module deals with various steps of achievement, including how to: understand how and why someone fails and succeeds, examine implicit and explicit learning and performance, and create a mindset of success.

Individual needs and ideals must align with career and goals for synchrony of purpose and for core value investing in one's career. Exercises synthesize purpose with ideal, and goals with strategy. Career enhancing caveats precede an exercise on integrating core ideals with goals, navigating changes and overcoming obstacles.

Optional tracks include work addiction identification and remedy, why managers succeed or fail, strategies for common managerial challenges, and the recovery from job loss.

#### **Workbook Tools**

- *18 Career Enhancement Caveats*
- *A Systematic Method for Reviewing and Solving Problems*
- *Career Assessment: Core Values; Goals; Changes; Obstacles*
- *Work Addiction: Self Evaluation Questions + Remedies*
- *Common Managerial Problems and Strategies*

## 18 CAREER ENHANCEMENT CAVEATS

1. **When your head and your gut (what you think and feel) both agree, and you act accordingly, you won't go wrong.**

It is when we disregard, delete, or cover over one or the other that we fall into compromise. Emotional goals and internal values must be consistent with external plan and vision.

2. **Having a definition of success and an internal ideal of "good enough" are essential for satisfaction.**

Epicurus had it right: "Nothing is enough for the man for whom enough is too little."

A passage in one of Robert Schumann's piano sonatas marked, "As fast as possible" is followed a few bars later with the admonition, "Faster."

The most outstanding characteristic of the superachievers I have known is that all of them love their work and their play.

3. **Rich is knowing you have enough.**

An internal definition of success is essential. It may be defined differently by men, by women, and even individual by individual. The familiar model of male competition makes measurement of external success clearer. But internal success is measured by ideals, quality of relations with important others, and comfort with one's self. Self-esteem comes of having internal ideals as guides.

4. **Long-term goals are necessary to keep perspective, while short-term goals are necessary to sustain enthusiasm and tolerate frustration.**

Short-term setbacks are essential to achieving success within the orientation and organization long-term goals provide. In learning to walk, the toddler's fall is not a failure but part of the process of learning to walk. When you have the endpoint of your purpose clearly in mind, you can more easily keep setbacks in perspective.



**5. Respect the boundaries between work and private life.**

In order to be fully immersed in your work at your office, and likewise in your private life when you are home, a clear boundary between the two must exist for each day, each weekend, and for designated vacation periods. In order to be maximally effective when you are at work, making time for a private life and for play is crucial. Creativity, which can be nurturing in itself, needs time to ferment, develop, and expand. Even though you may enjoy and feel rewarded by your work, play is equally important.

**6. Develop your emotional and interpersonal expertise as well as your technical expertise.**

All three can be finely tuned and mutually enhancing. Consider also when different listening positions may be more effective. At times a colleague or employee may need your empathic ear; at other times, an objective, even confrontational position may be needed. Part of establishing a goal is identifying whom you need to work with. Then identify the skills, knowledge, and abilities you need to develop in order to reach the goal.

**7. Thinking, feeling, and imagining are all active forms of doing something.**

Yet thinking, feeling, and imagining are different from action. Physical action is not the only form of doing something. You can't simply apply willpower to become happy or undepressed; the emotional issues that interfere and facilitate have to be addressed.

**8. A potential space between urge and action is where judgment resides.**

"What is in my best interest?" is a question that can always be in the background, and at times the foreground. Thinking about something and considering it is a response, one that may be necessary at times when you feel the urge to act, or may be feeling the pressure from others to act. There are few true emergencies in life.

**9. You'll never do anything important that will feel comfortable in the beginning.**

Mastery requires you to proceed despite your anxiety. You can't learn to swim by figuring it out on paper or in your head. Mastery and effectiveness convert anxiety and uncertainty to comfort. Anxiety is often assumed to be bad, as a signal of danger as it may have been in an earlier context.

Consider anxiety as a signal that you are proceeding in new territory, beyond where you've been before. Anything really important requires a commitment to going forward despite discomfort.

**10. Assess what reaching a goal will do.**

It is important to know what achieving a goal will do in order to distinguish clearly what it will not do. For example, reaching a career goal will not undo the past, or make other troubles go away. Having more money won't make a marriage relationship better.

**11. Just having a choice can make choosing the same thing feel very different.**

Not only can you change, you can choose how you change. A gain in insight and understanding constitutes internal change; external change is another step in and of itself. Every step of growth and change involves its own mourning; you have to relinquish a past position in order to move ahead.

**12. Growth and change are hard. The only thing harder is not growing or changing.**

What you decide to accept undergoes a change. The only familiar territory is behind you. Danish philosopher, Soren Kierkegaard said, "Life can only be understood backwards, but it must be lived forwards."

**13. Recognize your own limits in order to achieve success.**

It may be difficult to recognize those limits and to seek the advice of others. It may seem a weakness or an acknowledgement of limitation to consult with an expert. Failing to recognize the limits of your knowledge in any area, or being unable to admit mistakes, can profoundly hamper your judgment.

**14. Admit mistakes in order to cut losses.**

For instance, the prospect of selling a plunging stock at a loss may make the loss so concrete and real that you will have difficulty selling. As long as the stock isn't sold, you can retain the hope of reversing the "paper loss." Be able to recognize that success and sound decisions in one arena, such as being an accomplished physician, does not guarantee success in others.



**15. Be willing to seek suggestions, critiques, and advice without taking it personally.**

Consulting only with those who mirror and agree with your opinion is far easier than listening objectively to critical or contradictory information. The decision to seek consultation from individuals knowledgeable in specific areas may be as logically sound as it is emotionally difficult.

**16. Distinguish lack of information and organization from unconscious conflict.**

Further information, strategy, and redoubled efforts will continue to fail if emotional conflict creates a barrier. Determine whether your plan is faulty and needs to be changed, or whether poor performance prevents realization of the plan.

**17. Planning and strategy are essential components of a plan.**

A plan, an agenda for what you want to happen, must combine with strategy, a view, and structure of how you will proceed. Strategy includes flexibility, because you can't always predict exactly what will happen or how you will need to respond. The most common reason for failing at a plan is not having one. The second most common reason is having a plan but not sticking to it.

**18. Examine the process that gets you to a good result. Examine the process that gets you to a bad result.**

You can learn immensely from both. Any plan for success must incorporate the understandable fear of taking risks and making mistakes as a necessary stepping-stone to goals.

## **A SYSTEMATIC METHOD FOR REVIEWING AND SOLVING PROBLEMS**

A systematic method for reviewing and solving problems can be remembered by the acronym SOLVE:

- S** State the area of the problem as specifically as possible.
- O** Outline the problem in as much detail as possible: where, when, how, who.
- L** List alternatives. Write down the first ten solutions that come to mind without analyzing them. Then select the three best solutions, which are the ones that recognize your unique abilities, do not create limitations, and that organize a focus.
- V** Visualize the consequences. This visualization should incorporate a good bit of your interests, abilities, personality style, and values with your problem-solving approach. The alternative that feels best – the most comfortable – may be the best. Plan a strategy to achieve the specific goal. Gather information from experts if necessary, but develop your own plan.
- E** Evaluate the results after a full effort at problem solving. If there has been a failure, evaluate the most common causes of failure: A wrong fit between work and abilities, interests, and personality style; too scattered a focus; an absence of commitment; discomfort about being in unfamiliar territory; hidden barriers, such as a conscious goal in that opposes a need or ideal.



## **CAREER ASSESSMENT**

### ***Core Values***

1. In looking at my internal model of myself, am I clear about my ideals? Am I clear about my internal standards of “good enough”?
2. As I look at the big picture, do I have a clear overview of the past, present, and the future, in terms of my goals and values?
3. How well do my sense of self, values, and ideals fit with what I am doing in my career?
4. If I exposed my real self to a greater extent, what would be the result?
5. What labels do I attach to myself?
6. Do these self-imposed labels limit me or serve as an explanation for my behavior (for example, shy, follower, or procrastinator)?
7. What do I know or do better and with more passion than almost anyone else? Is it synonymous with my values and ideals?
8. What is the one thing that I do uniquely well? What are the things, after what I do uniquely well, that I do exceptionally well? Good enough? Not good at? If at all possible, am I delegating everything that I am not uniquely good at?
9. Am I living my life fully for me, or for how I want to be viewed or think I should be doing?

## **Goals**

1. Have I developed my own personal and internally derived definition of success, and formulated my own goals?
2. In goal setting, is my motivation primarily internal or external?
3. Is the reward or esteem derived from one area, such as career, absorbing more of my energy and time so that I create pressure and vulnerability in other areas that are also vitally important?
4. Have I determined what I can and what I can't effectively address and create? Am I putting all of my energy into what I can effectively create? Am I letting go or avoiding those areas where I have no power or ability?
5. What is my vision for my career in the next 12 months?
6. What are my top three goals?
7. What is my biggest challenge?
8. Do I have a specific strategy and plan to achieve my goals?
9. Do I have a map of how I want to reach my goal
10. Do I have specific and tangible ways of measuring progress, goal attainment, and time frame?
11. After reaching a particular goal, do I wonder, "Is that all there is?" Or do I find that I am no longer sufficiently interested to sustain the passion and engagement?
12. Am I able to relax completely?
13. Am I holding back from making important commitments because they seem to close off other alternatives?
14. Does it seem selfish to act on my own needs?
15. Am I advancing in my career in line with my true potential?
16. Do I find it difficult to finish things without a deadline?
17. How much do I rely on others for direction, affirmation, and self-esteem?



## ***Changes and Obstacles***

1. Do I have a clear perspective of where I am now, in terms of where I've been and where I want to go?
2. Do I have a clear and precise game plan with realistic attainable goals and measurable results, with a specific time frame?
3. Are my decisions and progress and my career path consistent with my overall game plan?
4. Am I ready to make changes and to try new things, including calculated risks required to move ahead?
5. What is the most frightening thing about realizing the goals and results I have set out?
6. Am I willing to tolerate the anxiety and uncertainty of change and newness in order to sustain my effort and reach my goals?
7. Where do I create obstacles, or stop myself short of my full potential and goals?
8. What are the ways I distract myself and waste time?
9. Is there any internal influence keeping me from proceeding with my plan for success?
10. Do I feel that I have to be a driven, type A personality to really succeed?
11. Am I so concerned with making a mistake that I inhibit my efforts or hold back from trying something I really want to do?
12. Do I often base my decisions on how other people will perceive me?
13. Do I feel equally successful with family and spirituality as with career?
14. What opportunities exist in my career that I have not yet taken advantage of?
15. Am I at a place in my career where I am essentially running my work/businesses? Are there times when it is running me?
16. Do I make use of others - experts, consultant, advisors, and mentors - to provide input and objectivity?

## **WORK ADDICTION: SELF-EVALUATION QUESTIONS**

Change begins by looking at things in a different way. Consider the following questions in relation to your work and your feelings about your work identity.

- Do you have a specific time when your work life stops and your private life begins each day? Each weekend? For vacations?
- When you leave work in the evening, do problems, projects, calls, appointments, and meetings follow you home and erode your private time?
- Do you have withdrawal symptoms when not working, such as restlessness, anxiety, depression, or psychosomatic symptoms?
- Has anyone close to you ever accused you of being a workaholic?
- Have you become creative in rationalizing your excesses, perhaps by convincing yourself that success demands a dedication bordering on obsession? Do you fear failure if you do anything less?
- Can you not seem to stop replaying conversations at work, reassessing decisions, and reexamining work details?
- Is what you do who you are? Is your identity as a person so closely linked to your work identity that it is difficult to enjoy an activity not connected with work?
- Do you take setbacks, feedback, or criticism of work projects personally?
- Are you still trying to prove your worth to yourself, or someone else, by what you do? Do you believe that only unending effort will demonstrate your true value?
- Are you doing what you do for someone else's response, or for your own benefit and satisfaction of your own ideals?
- Is work an escape? Does it allow you to fill a void or get out of doing something you regard as unpleasant, such as meeting family obligations or facing family conflicts?
- Do you have medical problems as a result of overwork, or a physical deterioration from alcohol, cigarettes, skimping on sleep, or overeating?
- Has your social or family function deteriorated as a result of excessive work, including neglect of children or spouse?



## ***Some Remedies for Work Addiction***

- Establish a clear boundary between your work life and your private life: each day, each weekend, and for designated vacation periods. If you feel guilty or vaguely uncomfortable with taking time off or relaxing, consider reframing the time, even the play, as a necessary component of your work. In order to be maximally effective when you are at work, making time for a private life and for play is crucial.
- Even though you may enjoy and feel rewarded by your work, play is equally important. Creativity, nurturing in itself, needs time to ferment, develop, and expand. You may even find it useful to set aside a brief time at the end of each day to allow closure of work activity, to have an official transition time that puts a period at the end of the sentence of each day so that time off is really time off.
- Establish your own life plan on a daily basis, as well as the big picture on a yearly and career-long basis. Keeping a journal may be useful. Writing down your thoughts, feelings, plans, and timetables regarding work can clarify things and may provide a basis for reflection and comparison from year to year.
- Distinguish the feedback, criticism, and setbacks on work project in relation to the work itself, the task you've performed. Try not to hear them as a personal affront or invalidation.
- Develop your emotional, interpersonal expertise as well as your technical expertise. Both can be finely tuned. Consider, for example, when different listening positions may be most effective. At times a colleague or employer may need your empathic ear; at other times an objective, even confrontational position may be needed.
- Know the difference between thinking, feeling, and imagining, as opposed to acting. Physical action is not the only form of doing something; thinking and contemplating are active forms of doing something. This distinction may seem obvious, but it is not clear in the minds of many people. For example, a patient may come into the psychiatrist's office wanting to know what to "do" about her depression. There is no immediate thing to do; we must begin by understanding and resolving the physical or emotional issues that underlie the symptom.

The patient's own failed attempts to approach the problem actively, to apply willpower and distracting activity, provide ample evidence that another approach is required.

- Reassess the amount of time you spend talking about your work with family and friends, and the amount of time you spend associating only with friends from work or people in the same line of work. Obviously people who care about each other are interested in all the things that are important to the other, including work. But being caught up in “war stories” may represent an inability to establish boundaries for work or an overinclusive identity with one's work.



## **COMMON MANAGERIAL PROBLEMS AND STRATEGIES**

Although there are real, external reasons for managerial difficulty – including massive reorganization after takeovers and the realities of discrimination due to age, sex, and race – managers most often fail for reasons they themselves create.

### ***Problem: Excessive Narcissism and Self-Interest***

Individuals with an excessive need for positive feedback and a preoccupation with themselves quickly alienate colleagues, supervisors, and subordinates. Others with strong narcissistic needs may require the enthusiasm and idealization of others. If you fall into this category, you may try the following:

### ***Solution:***

- Reframe statements about personal glory and accomplishment as organizational accomplishments.
- Use the words “we” and “us” instead of “I” and “me.” Caution: For this to work, the change in terminology has to reflect a change in attitude. You have to become an authentic team player.
- Instead of demanding recognition and affirmation from colleagues and subordinates, find other ways to address these needs. Other groups and endeavors outside your professional arena, as well as your family, may better meet these needs. If expanding your scope isn’t enough, seek an Executive Coach.
- You must be able to be wrong all alone and be successful as part of a team.
- There is a thin line between self-absorbed narcissism and charismatic leadership, often bridged by thinking systemically of the group or organization rather than “I”, and supplying to others the very feedback most wanted by yourself: Affirmation, recognition, praise.

### ***Problem: Inability to Get Along with Subordinates***

Authoritarian leaders may have an especially difficult time inspiring others, creating a sense of loyalty, and establishing cohesive teamwork. Many experts in the field view poor interpersonal skills as the single most frequent factor in the failure of managers, especially early in their career. This is a crucial area.

### ***Solution:***

- Develop the ability to listen well. Invite feedback and criticism, then listen carefully, attentively, without interruption, and without the need to feel defensive.
- Remain empathically attuned to subordinates. Listen to them, to their experiences, and realize how they may hear what you have to say. Anything you say is already in the context of a superior-subordinate relationship, thus, they may be inclined to hear it more critically or harshly than you intend.
- View conflict and differences of opinion as something welcome and inevitable rather than as something bad that must be quashed.
- Involve subordinates in decisions to develop a we-and-us feeling. For group cohesiveness, all need to consider themselves part of the group effort. Elicit new ideas and cooperation.
- Give them credit for their work, and subordinate your own credit to the credit of the group.



### ***Problem: Fear of Action and Fear of Failure***

An emotionally isolated leader may retreat just when he or she most needs to engage. Fearing failure or significant criticism, such a leader may retreat, giving the appearance of lack of commitment. An underlying assumption is that inaction prevents mistakes in management. In actuality, this practice may hasten the leader's downfall.

### ***Solution:***

- Accumulate as much data as possible, but plan a time when data-collection will stop and action will begin. Some individuals will study something so exhaustively that they bypass deadlines needed for action.
- Separate, as much as possible, personal assumptions and fears of failure from the organizational task at hand. Recognize that inaction is a form of failure; know when action is required. A ship is safe in a harbor, but ships aren't made to sit in a harbor.
- At times, it may be useful to consult with someone outside the system who can be objective and observant.

## ***Problem: Failure to Adapt to Change and Rebound from Setbacks***

Life is a developmental process; so is the life of an organization. A once-successful management style or strategy needs to evolve as an organization grows. Flexibility of thought and action is especially important for managers in restructured or acquired companies. In a rapidly changing environment it is essential to relinquish old management styles. .

### ***Solution:***

- Be sure your management style and approach fit with the organizational task and your level of responsibility. For example, the individual who moves from a creative or entrepreneurial task to the management of people doing similar tasks needs to adopt a different approach to work.
- Acknowledge failure, and request understanding and help in rebounding from it.
- Do not become defensive at criticism or feedback, but welcome it; cooperative input is vital in a rapidly changing environment or company. Don't try to conceal failure or blame it on others. The way one handles failure is an issue that may make or break an advancing career.



# Module 8

## Your New Relationship Story

They may forget what you said, but they will never forget how you made them feel.

*Carl Buehner*

Love is the selfless promotion of the growth of another.

*Milton Meyerhoff*







## **MODULE 8**

### ***YOUR NEW RELATIONSHIP STORY***

Every relationship is co-authored, combining two individual stories and one co-created story. Each party in a relationship brings unspoken assumptions and implicit contracts that can derail the relationship. Exercises include power and gender issues, communication facilitation, and relationship enhancement.

The module details an approach of mutual commitment to respect needs and wants of the other without neglecting your own, ways of facilitating communication, and tips on negotiating on different points of view.

Coauthoring a mutually satisfying relationship built on common ground can replace storylines of unmet needs and wants. Some core relationship principles are presented to establish a foundation for the relationship exercise tools.

#### **Workbook Tools**

- *Communication as Connection: Maxims + Steps*
- *Information Processing Exercise*
- *12 Relationship Principles*
- *Recognize the place of assumptions about money, power, and gender*
- *A Relationship Story Exercise*

## **COMMUNICATION AND CONNECTION: MAXIMS + STEPS**

### **4 Maxims of Communication**

- 1. The person who makes a difference in your life is the one who listens as if he or she always knew who you are, and gives it all back to you.**

Each relationship combines two individual stories to coauthor a new relationship story. The implicit contracts authored by each party in a relationship become unspoken assumptions that can facilitate or derail the relationship. Making explicit the hidden assumptions and implicit expectations becomes a crucial part of communication. To see the point of view of the other and to communicate that understanding, each must respect the other's point of view. Understanding and respect are not synonymous with agreement.

- 2. Ultimate freedom is not relying on someone else's response to determine how you feel about yourself.**

Ineffectiveness of communication, simply feeling that what you said was not heard or registered by the other, may produce irritation or anger. Then the content of the discussion becomes more intense. The process that initiated the derailment - feeling invalidated - gets lost.

The simple step of repeating to the other what you heard him or her say prior to making your own point validates listening. You are then in a position to be heard more successfully. Your individual responsibility to co-author a mutually satisfying relationship includes the following:

- Mutual commitment to respect for the other's needs and wants without neglecting your own.
- Facilitation of communication.
- Mutual negotiation on different points of view.
- Explicit awareness of implicit assumptions.
- Acknowledgement and understanding of needs and wants made obvious by relationship symptoms.



**3. The greatest vulnerability is daring to risk your best feelings.**

**4. The greatest satisfaction is risking your best feelings.**

### ***4 Steps of Communication***

Much of the difficulty in relationships comes from one of two areas: assuming you can change someone else's behavior or attitude, and faulty communication.

A basic human desire is to connect with another. The power within a relationship is not a decision, but a commitment at a heart level. Communication is a significant basic component in any business or personal relationship.

**1. Reflect back to the speaker what you heard him or her say.**

This simple step assures the speaker of effectiveness - of being heard. If you're poised with a response rather than listening and reflecting, the first speaker may feel a need to repeat; both speakers are then vulnerable to escalation of emotional tone.

In any relationship each person's perspective is different. It is important that each sees the other's point of view and avoids hijacking the other's agenda. The unspoken resolution may be some variation of, "I see your point of view, and I have mine, and yours does not take over mine, though perhaps you would wish it would, just as I would wish that my point of view would take over yours." Knowing and respecting each other's point of view is the initial phase of a satisfying mutual, equal collaboration.

**2. Clarify by asking the next question.**

Socrates taught us that really smart people ask questions rather than give answers. The detail may contain the feeling and the important aspects that otherwise would have to be assumed.

A large corporation's executive team huddled around a tape recorder listening to the last presentation by the CEO of that company. They were playing it, rewinding it, playing it again. Each looked puzzled. The consultant asked them what they were trying to do. In his speech, the CEO had indicated that the organization should embrace more color. They each had a different idea about what color meant: Dress, race, decoration, language, stationery.

No one had considered simply picking up the phone and asking the next question, “What do you mean by color?”

3. **Provide a context. The context of any statement or meaning includes time, location, and system.**
4. **Listen between the lines.**

For someone who listens for facts, that filter will mean that the person stops listening when the speaker stops giving facts. When a very intelligent person listens for information, the communicator, in order to hold the listener’s attention, must interweave information with the newness of what is being said. The speaker’s empathic attunement to the listener includes creating a listening environment while providing information without losing the listener’s attention.

Listen literally and closely to what someone says, and you will pick up constant clues about what is wanted and needed. Truth as well as reality is perception.



## **INFORMATION PROCESSING EXERCISE**

How information is perceived and channeled is one element of a life story.

Three fundamental representational systems elaborated in Neuro-Linguistic Programming based on the predominant representation channel include visual, auditory, and kinesthetic. How each person perceives, records, and recalls events depends on the predominant representational system used.

### **Auditory**

Though not exclusive, an individual uses predominantly one representational mode. Those who take in information best through auditory presentation perceive experiences more in terms of sound and spoken word. They use phrases such as:

- *I hear what you are saying.*
- *I really want you to listen.*
- *It sounds good.*
- *Tuned in.*
- *Within hearing.*
- *Loud and clear.*

### **Visual**

Those who primarily process in a visual way record and construct pictures or internal images of their experiences; they recall by snapping a picture into focus. Visual individuals will be inclined to say:

- *Can you picture it?*
- *I can see what you're saying.*
- *Bring this into focus.*
- *It appears to me. . .*
- *Mental image.*
- *It seems fuzzy to me.*
- *I'd like to look at it.*
- *Short-sided.*

### **Kinesthetic**

Kinesthetic individuals experience in a bodily way, and index information by sensation and feeling. Those more kinesthetic use sensory and bodily terms, such as:

- *I need to grasp that.*
- *Hold that thought.*

- *Come to grips with.*
- *Able to get a handle on it.*
- *Hand in hand.*
- *Hold on.*
- *To be more in touch with. . .*
- *Start from scratch.*
- *I'll walk you through this.*
- *It slipped through my hands.*

Developing empathy and establishing rapport with another can be facilitated by awareness of the other's primary representational system.

Neuro-linguistic program researchers and practitioners have distilled some basic principles of recognizing the particular model and using it to facilitate communication

- Recognize the predominant channel of processing information for yourself and your partner: auditory, visual, or kinesthetic.
- Respect the other person's model of the world, of perceiving and processing information along one of the three representational systems. One is not better than the other, just different.
- The observational skills of the type and meaning of communication is a necessary component of emotional intelligence.
- The meaning of the communication may be best indicated by the response that you get.
- The representational system, as well as the words, is only a symbol of the event, not the event itself. A map is not the territory. The model of your mind is not your mind.
- At times, the most important information about an individual is behavior.
- An individual's behavior at any moment is not who he or she is. (Yet when a particular behavior persists, remember Maya Angelou's advice, "When people show you who they are, believe them.")
- If what you are doing is not working, rather than doing it harder, think about doing it differently.
- Understanding this method of coding and understanding successful behavior and communication along one of the three models replicates and builds further success and intimacy



## **12 RELATIONSHIP PRINCIPLES**

1. Each person has a point of view.
2. Communication establishes a common ground for understanding different points of view and creating a mutual, collaborative agreement or plan.
3. Developing empathy with another is predicated on doing it with yourself first. Empathy is a way of listening to yourself as well as to another person's entire experience of feeling, thinking, perceiving, and behaving. Rapport is from the French word "rapporter" which means to be in touch or contact with a person, and it can apply to yourself as well as to others.
4. What someone believes is more important than what they know.
5. To require that someone else respond to you in a particular way renders inauthentic both the person and the response.
6. What you don't do is as important as what you do.
7. Strike while the iron is cold. Know when to be reflective and invoke principles. When the house is burning is no time to teach fire-safety principles.
8. There are few true emergencies in life. "I'd like to think about that and get back to you" is a response.
9. How empathic ruptures are learned from, understood, and repaired becomes a core maintenance aspect of every relationship. Everyone fails empathically with another at times. The most important thing may not be what you have done, but what you do after what you have done.
10. To forgive someone is to free yourself; if you hold onto anger and hurt, you continue to hold the injury.
11. You cannot change yourself by first trying to change someone else.  

The only person you can change is you. Attempting to change someone else's mode of processing or personality style won't work—and will create derailments. Quicken software cannot be changed or rehabilitated to WordPerfect.
12. To have someone live an unexpressed part of yourself can be both unsatisfying and addictive.

## **RECOGNIZE THE PLACE OF ASSUMPTIONS ABOUT MONEY, POWER, AND GENDER**

- Acknowledge the differences in income, work, and potential between you and your spouse, and the implications these differences have for the balance of power in your relationship.
- Be aware of the rules, stated or unstated, by which male and female roles are chosen and rewarded in the family, and on such matters as who makes decisions, who handles financial matters, and who handles the daily responsibilities of family life, such as household, children, and chores.
- Develop a clear understanding of the attitudes of male and female roles in the family and in the broader political, social, and economic issues that have an impact on child-rearing, divorce, and aging.
- How is each of you validated or invalidated, empowered or eroded, in areas of work and money?



## ***A RELATIONSHIP STORY EXERCISE***

### **Reflect on what you have learned from previous contacts:**

- How did I do in my last conversation? How do I feel about that?
- What patterns in my relationship and conversations do I want to change? To outgrow?
- What patterns in my relationship and conversations do I want to expand? To initiate?
- What judgments do I make of myself around this person? What judgments do I make of him/her?
- What judgments or criticism do I assume and expect?

### **Prepare for co-creating a new relationship story:**

- Outline the basic aspects of the story you want to create.
- Consider your frame of mind prior to your communication. Get centered in your body and relaxed.

### **Further the agenda:**

- What does each of us want from the other?
- What does each of us need from the other?
- Am I relying on this person to provide some need or want that I could provide for myself?
- What could I communicate to convey precisely what I want and need?
- Do I know precisely how my collaboration partner sees the issues?

**Foster the process of communication:**

- With emotionally charged topics, reflect back to your partner what you hear him or her saying before offering your point. This reflection assures the other's sense of effectiveness—to know that you register what was said. The other person is then in a better position to listen to you.
- Am I being all of myself in the relationship?
- Am I being aware of not taking things personally?
- How could I better support my collaboration partner?



# Module 9

## Live Your New Success Story

You can't build a reputation  
on what you're going to do.

*Henry Ford*

Try not to become a man of success,  
but rather try to become a man of value.

*Albert Einstein*

The greater danger for most of us is not that our aim  
is too high and we miss it, but that it is too low and  
that we reach it.

*Michaelangelo*







## **MODULE 9**

### **LIVE YOUR NEW SUCCESS STORY**

A success story necessarily involves assessing and resolving resistance to change.

Separate sections for men and woman identify and formulate strategies for the unique success issues of each gender. Self-inquiry quizzes for men and women illustrate invisible patterns and hidden beliefs that impact success.

Teaching tools illuminate such polarities as “*Addiction to extreme success*” and “*Essential caveats of successful being*,” The module guides readers to attain an internal sense of what is “good enough” with a personal definition of fulfillment and accompanying self-validation.

The module reviews the system of action plans for growth and possibility thinking.

#### **Workbook Tools**

- *Are you Afraid of Success?*
- *Success Self-Inquiry for Women*
- *Success Self-Inquiry for Men*
- *Success Intoxication: Recognition and Prevention*
- *Life’s Ground Rules, Part II: 30 Essential Caveats of Successful Being*
- *Your Life Story: Good News/Bad News*
- *A Self-Coaching Summary*
- *Paradoxes Inherent in the Process of Growth*
- *6 Step Action Plan*
- *Possibility Thinking*
- *18-Step Growth Plan*
- *11 Maxims of Sustained Growth*

## ARE YOU AFRAID OF SUCCESS?

Answer the following questions "true" or "false."

- Do I usually stop short of finishing things?
- Am I more concerned about how others see me than about what's best for my work and myself?
- Do I feel like a fraud whenever I succeed at something?
- Do I start too many projects at once and end up not finishing any of them?
- Do I want to do more than what I'm doing, but I can't choose a direction and stick to it?
- When I get what I really want, does something bad usually happen?
- If I can't do something perfectly from the beginning, do I not want to try it at all?
- Do I feel like my husband's/wife's/parent's shadow?
- When I start to do something, do I remember the voices of my parents criticizing me?
- I've got talent, but am I still waiting to be discovered?
- Do I believe that people shouldn't try to rise about their station in life?
- Have I always been an underachiever?
- In a crisis, do I choke or clutch?
- Are title and position are more important than how I feel?
- Whatever I do and however much I get, do I want more?
- Do I feel that I'd be nothing without my job?
- Do I believe that successful women scare men away?
- Do I feel so let down when I fail at something that I don't even want to try anymore?
- Do I hate the person I have become at work?
- Do I feel that I'd be exposed as inadequate if I finally get to the top?



## ***Success Self-Inquiry for Women***

Make an appointment with yourself to reflect on and write your answers to the following questions.

**1. What is your own personal definition of success?**

*“The tragedy of life doesn’t lie in not reaching your goal. The tragedy lies in having no goal to reach.” ~ Benjamin F. Mays.*

**2. What does money represent to you? What does money management entail for you?**

Have you been regarding money and money management as autonomy and security, in addition to focusing on short-term money management such as finding bargains and balancing the checkbook?

**3. How much do you rely on others for direction, affirmation, and self-esteem?**

It is the process of looking to someone or something else for what is missing that creates something missing.

**4. Do you read the business section of the newspaper and watch or listen to the financial portion of the broadcast news to balance your awareness of events?**

These small behavioral changes can expand awareness and promote different ways of thinking.

**5. Do you believe that if you’re competent and work hard, your boss will offer you a promotion or raise without your having to ask for it or promote yourself?**

Some people have been conditioned to wait for “gifts”; they believe that doing all the right things, performing well, and waiting to be recognized will bring the appropriate reward. A more useful technique, particularly in larger companies, is to find an intelligent, sensitive way to make your work visible. You may have to take the initiative in listing your accomplishments and requesting your own raises. If at all possible, find a female mentor.

**6. Do you believe that asserting yourself is being too pushy?**

Here is the delicate balance, as well as a double standard: Behavior considered assertive for a man has traditionally been seen as aggressive in a woman. Generally, however, the better you are at your work, the more room you can carve out for being yourself.

**7. Do you have specific long-term goals and a step-by-step process for reaching them?**

*“It is much more difficult to measure non-performance than performance.” ~ Harold S. Geneen.*

**8. Once you have a game plan for success, are you afraid to take risks and make mistakes?**

*“Some people try to softly tiptoe through life so that they can arrive at death safely.” ~ Robert Anthony*

**9. Do you believe that to make it in the business world you have to behave like a man?**

Your womanly side may be your best asset. Delores Danska, an award-winning television program manager, stated, “In my job, I need to bring out the best in my producers, which means being supporting, encouraging, and caring.”

**10. Do you feel you have to be driven, type A personality to be a real success?**

Achievers achieve because they combine ambition and ideals. They have a commitment and work to achieve it. None of these represent a personality profile or character type; there are many personality styles and types among achievers. Rather than trying to be more like someone who is an achiever, be more like yourself. Listen for how and what you want to do.



## ***Success Self-Inquiry for Men***

Make an appointment with yourself to reflect on and write your answers to the following questions.

### **1. What is success for you?**

*“Nothing is enough to the man for whom enough is too little.”  
~ Epicurus.*

### **2. Do you have a clear definition of external success?**

This level of success is the easier one to define. The metrics of this success include money, material acquisitions, work accomplishments, titles, regard by associates and friends.

### **3. Do you have a clear definition of internal success?**

This type of success isn't easily mapped. And it may be defined differently by men, by women, and even by each individual. The familiar model of male competition makes measurement of external success clearer. But internal success is measured against ideals, relatedness with important others, and contentment with oneself. This type of success involves connecting ambition with ideals and living up to your own standards.

### **4. Do you have specific long-term goals and a step-by-step process for reaching them?**

Having long-term goals can keep you oriented and organized; having step-by-step, short-term goals can help you sustain enthusiasm and tolerate frustration. Short-term setbacks are an essential part of achieving success. For a toddler learning to walk, falling is not a failure, but part of the process of learning to walk. If you have an end point, your purpose, clearly in mind, you can more easily keep setbacks in perspective. .

### **5. Once you have a plan for success, are you afraid to take risks and make mistakes?**

*“To him, being human was only an excuse for not being perfect.”  
~ Katherine Anne Porter*

**6. Is anything internal keeping you from proceeding with your plan for success?**

*“Nothing prevents our being natural so much as the desire to appear so.”*

*~ Francois La Rochefoucauld*



## **SUCCESS INTOXICATION:**

### **RECOGNITION AND PREVENTION**

Success can be intoxicating and gradual. If a frog were placed in hot water, it would immediately jump out and survive. If the frog were put in cold water and the temperature raised one degree at a time over an extended time, the frog would ultimately die because it would not perceive the water as hot.

This process is analogous to someone moving from one drink each evening gradually to two on the weekends, and a pattern begins that, because of its incremental nature, the change goes unnoticed until some profound event brings it into focus. The process may occur over a long period of time, making it even more imperceptible.

With extremes of success, such as accomplishment in business, the enhanced stimulation and self-reinforcing aspects of success can make it harder to regulate emotions and stay grounded in values and identity. For example, the stimulation of success can be so intoxicating that executives believe they can write their own rules, as recent corporate scandals have revealed.

With increasing demand, including excessive stimulation of success, the amount of time at work may expand; someone may never feel quite satisfied with accomplishments, always creating more. It may be harder to relax, because the stimulation of excess is invigorating. Boundaries between work and personal life may become blurred or eroded, as one is in demand a great deal. Self-esteem becomes exaggerated by constant affirmation. The metrics of success expand in terms of money, accolades, and accomplishments. Natural supplements, such as caffeine, alcohol, or sugar, sustain the adrenaline extremes.

This cycle may be interrupted by a crisis, such as a divorce, success, death, children's leaving home, or some catalyst to snap a bigger picture into focus. At times someone might deliberately create a crisis in order to step off the treadmill that he or she otherwise feels powerless to stop.

**The trappings of success may become so much a part of one's identity that it would feel shattering to change, feel like an amputation to give up any component of it.**

- Are there any personal values that you compromise for success?
- Do you subjugate any of your basic needs to the pursuit of success?

- Do you have any current regrets about the process or content of your success?
- A decade or two from now, when you look back on the present time, will you have any regrets?
- Have you wondered if this is all there is?

**Your own queries have to begin internally, by asking yourself several questions:**

- What is the finish line?
- Whom do you want to be when you cross it?
- Whom do you want to be there when you cross it?
- What is enough?
- How will you know when you get to enough?
- What are your specific metrics for success?
- How much of your identity is determined by these external benchmarks of success?



## ***LIFE'S GROUND RULES, PART II***

### ***30 Essential Caveats of Successful Being***

1. Our experiences are always consistent with our theories, so it is helpful to know our theories quite well.
2. We are always teaching people how to respond to us.
3. The only people who seem perfect are the ones we really don't know.
4. Remember that we are always and inevitably comparing our inside with everyone else's outside.
5. Lessons are repeated, though perhaps in different forms, until they are learned. The relationship is always the greatest teacher.
6. The things we learn we knew all along, though perhaps in a different form.
7. We are always a novice at each new step and stage of life. (By the time we've got certain things down, like parenting, we aren't doing it any more).
8. Each person will always give you the answers; sometimes, you have to listen very carefully to learn the questions.
9. Remember what's really important.
10. We learn to love by loving.
11. The more love you give away, the more you have left.
12. Being effective and experiencing mastery is the most fundamental of all human needs.
13. A good teacher shows you step-by-step that what you're looking for is what you already have.
14. Keep your eye on the ball and your head in the game.
15. You don't have to know all the answers; just get inside your experience and you will be informed. When your head and your gut both agree, you'll never go wrong.

16. Not everything we learn is necessarily something we want to learn.
17. For each new stage of life, we are so young at being older.
18. Flowers blossom toward the sunshine, not away from the dark.
19. Every lived experience is important and is stored in some way, though not all of it is retrievable by words and conscious memory.
20. Just as a child gives birth to parents, two people give birth to a relationship. Both are more work than you ever imagined, and both are more rewarding than you ever could have imagined.
21. We need not be filled with knowing, but with caring to learn. Preserve the curiosity and openness of a beginner's mind.
22. It may not be necessary to understand everything, just as there are some things which can be understood only after they happen. Sometimes you can only get ready for something after it has already occurred.
23. The most fundamental need children have is to look into the mirror of their parents' belief in them. It's the same with adults. Our belief in our children is internalized to become their belief in themselves, so that they do not dream too little, imagine too low, or play too small. It's the same with adults.
24. Nothing in the world is more important than the bond that the child develops in its relationship with each parent. Later, the same can be said for adults in significant relationships.
25. Bertrand Russell said, "The fundamental defect of fathers is that they want their children to be a credit to them." It's the same with mothers, the same with spouses, the same with CEOs.
26. Everything we do matters. The corollary is that what we do always comes back, though sometimes in altered forms.
27. Focus. Don't water last year's crops. Don't go to the hardware store for milk. Wishes don't wash dishes. (My grandmother).
28. What lies behind us and what lies before us are tiny matters compared to what lies within us. (Ralph Waldo Emerson).



29. True freedom is not needing someone else to respond in a particular way in order to proceed or to be happy.
30. We define ourselves by the choices we make, choose what information we receive, and decide whom we follow to influence us. Destiny is a step-by-step choice.

You are always free to change your mind. Changing your mind changes your life. Becoming your authentic self involves taking risks to make change, experiencing but not giving in to fear, releasing judgment and criticism, letting go of assumptions forged at an earlier time, and embracing dreams that bring mastery and accomplishment.

## ***Your Life Story: Good News/Bad News***

**Good News:** You are in control of your life

**Bad News:** You are in control of your life

**Good News:** Your choices in life define you

**Bad News:** Your choices in life define you

**Good News:** You can exert power and do with your life what you want

**Bad News:** That power is not inert, but always responding, moving

**Good News:** You can harness that power and direct it

**Bad News:** You have a default mode that could be worse than doing nothing

**Good News:** It is a moving energy.

**Bad News:** That energy can be used against you.

**Good News:** Everything has a choice embedded in it

**Bad News:** Even those who do not think they are choosing, are choosing

**Good News:** There is no such thing as doing nothing

**Bad News:** Minding your own business is an illusion of neutrality and inertness; doing nothing and minding your own business are the same thing.



## ***A SELF-COACHING SUMMARY***

1. Get all of yourself going in the same direction. You will know intrinsically when you are doing this, by the way it feels, and by your sense of yourself. Don't confuse newness and trepidation of being in new territory with a signal of its not being right, or of its not being unified in progress.
2. If you want to change your life, change your mind. Beliefs drive behaviors; behaviors drive performance.
3. You are always free to change your mind. When you change your mind, you change your life, as well as your vision of possibilities.
4. Have your inside and outside match to move your self, your life, your career to new realms of capacity and function.
5. Don't compare your inside to someone else's outside.
6. Believe in yourself. This will determine how much others believe in you.
7. Stick with yourself, no matter what. The "no matter what" may be ups and downs, things that you may never be able in this moment to predict. All you can know is that you will stick with yourself, no matter what, not losing sight of goals and ideals despite noise and stimulation. What you believe will be lived, and thus will come true.
8. If you find yourself denying change, it has already occurred.
9. To leave an old story, you have to have a new story to be in. Focus on developing that new story and collaborating on concretizing, co-creating, and living a game plan for career and life. When you engage the present and the future, you can expand vision and develop future potential. Employ a motivational, constructive, and effective collaboration with yourself and others to develop and realize a vision, goals, and results.
10. The only thing harder than the work of growth is not doing it.
11. People may hear what you are saying, but more importantly, they also sense how you feel and believe. People will register and remember how you made them feel even when they forget what you said.

12. What you believe will show. How you are, and how you behave with someone else, shows most in how it affects others responding to you.
13. As with any new venture, or stretch of current capacity, some fear and uncertainty are naturally there in the beginning. Anything you have ever done of significance begins with uncertainty and anxiety. Comfortable is a place you get to with repetition and mastery of new experiences. You can't learn to swim on paper; you just have to overcome anxiety to jump in the pool for the first time as part of the process of learning.
14. What you believe will become true, because you will live it. You are always creating outside to match inside. Your experiences are always consistent with your assumptions. It is vitally important to know your assumptions and theories quite well since you are always living them out. Once aware, you can change the ones that don't work, stick with and enhance the ones that do, and generate new beliefs designed for growth.
15. A vision leads you to it. You choose what you believe, though it may not seem an active choice.



## ***PARADOXES INHERENT IN THE PROCESS OF GROWTH***

1. Leaning on someone else temporarily helps one to stand alone.
2. Standing alone is the only way to get really close.
3. Knowing the answers precedes, and often makes possible, the questions.
4. No one wants a guide who has never been lost.
5. A fantasy can be more real than the rest of one's life. Fantasies and reality can change when beliefs are changed.
6. You are always free to change your mind.
7. The only thing harder than the work of growth is not doing it.
8. Speaking and looking are forms of touch.
9. A person can be more delicious than food.
10. Everything you do is important.
11. If you find yourself denying change, it has already occurred.
12. A vision leads you to it. We choose what we believe, though it may not seem an active choice

## **6-STEP ACTION PLAN FOR ACHIEVING GOALS**

1. Move resolution to decision (a commitment).
2. Identify benefits (happier, more prosperous, and more secure).
3. Outline obstacles that must be recognized in order to not create them. If there were nothing preventing you from reaching your objectives, you would have already done so. Until you identify the obstacles that stand between you and reaching your objectives, you are in denial.
4. Determine who are the other people, groups, and organizations you need to work with to reach your objectives.
5. Compile additional information to accomplish this objective.
6. Set the date to reach the goal as part of your game plan.



## **POSSIBILITY THINKING**

What you believe is what you'll see. This means that you are not just data determined, but also hypothesis determined. The brain as computer and as biological evolutionary system determines a story constructed to be called reality.

What is the practical value in this? About decision making? About how to change some mental models?

1. For any situation, look at the data, but also at the hypothesis--the default assumption that appears as "given."
2. Since we shape and filter the world by our hypotheses, they need to be continuously tested.
3. Examine the hypotheses that work and the ones that don't work.
4. Challenge your thinking and assumptions. Interact with diverse people and keep an open "beginner's mind" rather than a quick foreclosure to a new idea. Life as a series of experiments keeps a system open to the new. Premature closure occurs by too-rapid judgment, as well as moving a new idea into an already existing model to lose the context of a new model. This style of dismissal occurs frequently among very bright people with significant life experiences who immediately relate something new to something that they already know, absorbing it into an old context or meaning without sufficient examination.
5. We become comfortable and dependent on our old habits; uncertainty and discomfort result when we move away from existing internal models.
6. Use data to test a hypothesis rather than to automatically confirm it.
7. Distinguish between transforming your thinking and being caught up in a new fad. Focus on the foreground without losing sight of the background's big picture. Repeat zooming in and out to keep perspective. Both microscopic and macroscopic views offer benefits.
8. The best way to excise something from your life is not to ignore it. The best way to avoid something is to be informed by it. By avoiding something, you engage it, and keep it central in your life. To ignore takes energy, and moves you from a centered, healthy place. Decide what you want to keep, what you want to avoid, and what you want to let go.
9. You are always free to change your mind.

## **18-STEP NEW LIFE STORY GROWTH PLAN**

Clarify and envision the following:

1. Where you want to be, a vision coupled with purpose and objective.
2. How you see yourself and your functioning in terms of both strengths and weaknesses.
3. What you do uniquely well.
4. What you do exceptionally well.
5. What facilitates your change, progress, success.
6. What obstacles to your progress exist.
7. How you determine success with a specific set of goals.
8. Reassessment and revision of operating plan for change and growth based on experiences.
9. Short-term and long-term goals given your unique abilities.
10. Your best opportunity now .
11. Action steps for each week.
12. What the next level will be.
13. A strategy to achieve the next level.
14. Distractions, obstacles, energy drains, and time wasters.
15. After defining and specifying what is holding you back, the action you will take to not recreate that obstacle.
16. The challenges inherent in each goal.
17. Creative avoidance is still avoidance.
18. Don't compare your inside to someone else's outside.



## **11 MAXIMS OF SUSTAINED GROWTH**

1. Get all of yourself going in the same direction. You will know intrinsically when you are doing this, by the way it feels, and by your sense of yourself. Don't confuse newness and trepidation of being in new territory with a signal of its not being right, or of its not being unified in progress.
2. If you want to change your life, change your mind.
3. Have inside and outside match to move your self, you life, your career to new realms of capacity and function.
4. Believe in yourself. This will determine how much others believe in you.
5. Stick with yourself, no matter what. The “no matter what” may be ups and downs, things that you may never be able in this moment to predict. All you can know is that you will stick with yourself, no matter what, not losing sight of goals and ideals despite noise and stimulation. What you believe will be lived, and thus come true.
6. When you change your mind, you change your life, and your vision of potential, goals, and results.
7. To leave an old story, you have to have a new story to be in. Focus on developing that new story and collaborating on concretizing, co-creating, and living a game plan for career and life. When you engage the present and the future, you can expand vision, develop future potential, employ a motivational, constructive, and effective collaboration with yourself and others to develop and realize a vision, goals, and results.
8. People may hear what you are saying, but more importantly, they also sense how you feel and believe. Someone will register and remember how you made him or her feel even when they forget what you said.
9. What you believe will show. How you are, and how you behave with someone else, shows most in how it affects others responding to you.

10. As with any new venture, or stretch of current capacity, some fear and uncertainty are naturally there in the beginning. Comfortable is a place you get to with repetition and mastery of new experiences. You can't learn to swim on paper; you just have to overcome anxiety to jump in the pool for the first time as part of the process of learning, toward ultimate mastery and comfort.
  
11. What you believe will become true, because you will live it. You are always creating outside to match inside. Your experiences are always consistent with your assumptions. It is vitally important to know your assumptions and theories quite well since you are always living them out; once you are aware of them, you can change the ones that don't work, stick with and enhance the ones that do, and generate new beliefs designed for growth.



# Module 10

## Your New Wellness Story®

People don't grow old. When they stop growing,  
they become old.

*Anonymous*

When you were born, you cried and the world  
rejoiced. Live your life so that when you die, the  
world cries and you rejoice.

*Cherokee saying*







## **MODULE 10**

### **YOUR NEW WELLNESS STORY®**

#### **Workbook Tools**

- Wellness Defined
- *The Wellness System of Energy*
- *The Mindset of Wellness*
- *Identifying Body Language*
- *Wellness Initiatives*
- *Wellness Mind Mapping*
- *Why is Change so Difficult?*
- *Brain Programming for Wellness*
- *Wellness Focus and Visualization*

## **Wellness Defined**

Wellness integrates mind, body, and spirit with a balanced flow of energy. It is an ongoing process of choices that become the stories of our lives.

Wellness is never static--we never stay at the same place. So it must consistently be assessed. The core assessment involves an evaluation of what is working and not working in your life right now.

### **Wellness requires:**

- Self-awareness
- Informed physical care
- Meaningful connection with important others
- Balancing mind, body, and spiritual needs

### **The pursuit of wellness has immediate rewards. You can:**

- Feel better
- Become stronger
- Look younger
- Become healthier
- Increase energy
- Enhance physical and emotional well-being



## ***THE WELLNESS SYSTEM OF ENERGY***

Each person is an open system: We take in energy from sources around us, transform and organize it, and return it to the environment.

Ilya Prigogine won a Nobel Prize for his theory of dissipative structures. A dissipative structure is an open system in which energy is taken in, modified, and then returned (dissipated) to the environment.

Wellness requires an efficient flow of energy. Disease is when that flow of energy is disrupted, blocked, or derailed in some manner.

### **Consider these examples of disrupted energy flow:**

- Taking in more energy in the form of food than is required, resulting in obesity.
- Blockage of energy, such as suppressed communication or repressed feelings.
- An insufficient intake of energy, such as vitamins and nutrients, or denying compliments from others.
- Crossover or inappropriate substitution of one form of energy for another such as using sex to satisfy a spiritual need, or money to satisfy an emotional need.
- Rechannel energy in an indirect way, such as passive-aggressive behavior or psychosomatic symptoms.
- Weak interface or unfocused assertiveness with others, producing diminished emotional impact.
- Excessive withdrawals from your emotional or physical bank account without replenishing.
- Poor interface with the environment such as impulsive, explosive, or addictive behavior.

## **THE MINDSET OF WELLNESS**

Wellness is a mindset. This mindset gives ownership of a life story of wellness to the individual. With this ownership comes the responsibility—and privilege—that each thought, feeling, experience, and behavior is created each moment.

Recognition of the authorship of your wellness story includes awareness of the processes and behaviors of mind, body, and soul. This authorship includes the physical, emotional, and spiritual patterns that you engage on a daily basis. It means recognizing true needs and distinguishing them from wants.

- Mind includes constructive and creative use of your mind; knowing and living up to your ideals; maintaining a loyalty to your ideals; nurturing close relationships.
- Body includes making the choices that are in your best interest; informed, consistent pursuit of nutrition, exercise, and safety.
- Spiritual includes self-awareness and nurturance; meaningful endeavors; expression of feelings to others; asking and getting what you need.



## ***IDENTIFY BODY LANGUAGE***

Wellness is a quality of health and well-being that is essential. When this process is not practiced, the awareness of its omission may be crystallized in illness. Sometimes we only appreciate water when the well is dry.

This exercise will help you track bodily symptoms to a deeper meaning. The example of gastrointestinal upset will walk you through the steps.

1. Experience: Churning gut
2. When it occurs: After an upsetting event
3. It prevents: Outright expression of anger
4. Its reward: A refocusing to something I can end by a medication
5. The deeper need: Focus on the initial derailment of relationship and its subsequent breakdown product or upset
6. More effective approach: From a cool state of calmness, understand and express a point of view and illuminate hidden or implicit assumptions
7. The remedy: Rreframe or negotiate to a mutual agreement

## WELLNESS INITIATIVES

1. List three things that you know you can do to increase your wellness.

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2. What is one initiative you can take this week for each of the three wellness steps?

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3. Specifically plan the next best action for each initiative—one thing that you can you begin today that will give you a start in the process of change.

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4. Will you commit to this next best action today?

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## **WELLNESS MIND MAPPING**

1. What do you do to actively work at health and wellness?
2. Do you have any health challenges or illnesses?
3. Are you on any maintenance medications?
4. Have you educated yourself about the benefits of vitamins, minerals, and supplements?
5. What do you do to nurture yourself, and to reduce stress?
6. Do you make an appointment with yourself to relax/meditate?
7. Describe a typical day. Describe a typical week.
8. Describe your usual diet for a week. For one day, write down everything you eat and drink.
9. Describe your usual exercise for a week.
10. Describe what you do for fun and pleasure during a week. How often do you do it?
11. What barriers do you experience to wellness?

## WHY IS CHANGE SO DIFFICULT?

In studies of coronary bypass patients, when their lives are at risk unless they adopt healthier lifestyles, how many do you think change their habits? Only one in nine.

Changing behavior is difficult. What keeps people from doing what they need to do for themselves? What makes it so difficult for people to change, even when their lives depend on it?

Here is a sampling of preventable situations:

- 70% of healthcare costs stem from preventable diseases.  
(Center for Disease Control and Prevention)
- Stress contributes to 85% of all medical problems.  
(Cooper Wellness Program)
- 70-80% of primary-care physician visits are for stress-related complaints or disorders. (U.S. Public Health Survey; U.N. International Labor Organization study)
- Stress is the number-one reason behind sickness from work.  
(Gee Publishing Survey)
- Stress undermines work productivity in 9 of 10 companies.  
(Industrial Society survey)
- 71% of workers are not emotionally engaged in their work. (Gallup)
- Obesity, diabetes, and heart disease have reached epidemic proportions—and almost all are preventable.  
(American Medical Association)

Some of this resistance is based in staying in a comfort zone of the predictable and familiar. Another component of resistance is that our brains are programmed to operate on the default mode of repetition.

One answer is to have a clear, specific, stepwise program for change.



## ***BRAIN PROGRAMMING FOR WELLNESS***

Neuroscience now teaches us that we can either program wellness or program illness by our focus. We bring about not what we want but what we focus on. Focusing on illness and worry not only drains energy but adumbrates illness.

A negative thought loop is mentally replaying the same thoughts and reviewing the same scenarios again and again. You can't find an exit—you can't think or use logic to get out of it. While it looks like focusing, it's really obsessing. Thought loops are being marooned in your left brain.

Negative thought loops of worry will drain emotional and physical energy as well as create negative mental pictures that program your mind to their fulfillment. Since mind and body are connected, depletion of energy wears down the body's defenses.

### **To program wellness and deprogram illness:**

- Recognize negative thought loops such as worry.
- Write down the list of negative thoughts so that you can cue your radar for awareness.
- Write a list of positive, proactive thoughts/plans/affirmations.
- As soon as you recognize you're entering a negative thought loop, immediately move to a positive thought and action.
- For intrusive negative thoughts, schedule a time to engage them.
- Respect the boundary of engaging the negative concern only during the time that you have scheduled (e.g., 20 minutes each week at 3:30 PM Tuesdays).
- Mourn what cannot be changed. Place energy on what you can determine.
- Focus on and express gratitude for wellness.

## WELLNESS FOCUS AND VISUALIZATION

- Focus on the weight that feels good to you.
- Picture what you'll look like at your ideal weight. Look at the pictures daily.
- Write out your ideal body weight range.
- Focus on the body you want – your ideal weight range– your ideal body. (Remember, it has to be your body at ideal weight. You can't lose weight and have a supermodel's body.)
- Don't focus on losing weight.
- Don't focus on "fat thoughts" such as the following:
  - Slow metabolism
  - Hereditary body size
  - Slow thyroid
  - The spirit of your Great-Aunt Sally that channeled the curse of large thighs
- Look at and admire your body; be grateful; keep in mind the pictures you have.
- When you eat, be entirely present to the act of eating and to your body.
- Visualize the thoroughly chewed food assimilated throughout your body.
- Think and feel as though your desire is manifest.
- Create your body, as your life, intentionally

**Remember the ABCs: Ask. Believe. Create.**



*What if right now is a turning point for you?*

*The time your grandchildren will tell stories about years from now?*

*The time you awakened your deep passion and acted on it.*

*The time you did what you were always meant to do.*

*Or, this moment of truth may be a brief awakening,  
silenced by the sensible obstacles you're familiar with constructing.*

*In that case, your grandchildren will have to be content  
telling stories about your favorite sports team,  
or what great cookies you used to bake.*

*It will all depend on how brave you'll be.*



# Addendum

## CLIENT INFORMATION PACKET

### Information Sheet

Professional Coaching includes an initial extended evaluation, weekly telephone sessions, and perhaps e-mail, telephone, and fax communication. In-person meetings are also available. Arrangements may be made to focus Coaching on your writing, speaking, or other direct working observation venues.

Date: \_\_\_\_\_ Referred by: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Age: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Preferred Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Fax line: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

Preference for leaving messages: \_\_\_\_\_

Names of important people in your life (spouse, partner, children, friends, etc.):

\_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Other information you want me to know: \_\_\_\_\_

\_\_\_\_\_

## **Client Intake Form**

### ***A list of priorities and information about me:***

1. I want to improve or expand/extend use of the following skills or develop and create the following components to my professional/personal life:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

2. I want to resolve the following challenges or problems:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

3. I want to eliminate the following tolerations (what I'm putting up with in my life/business now):

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

4. I want to accomplish the following measurable or observable results:

a. \_\_\_\_\_



b. \_\_\_\_\_

c. \_\_\_\_\_

5. At this point, I think that I'd like to make these fundamental changes or shifts:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

6. What I want and need most from you, as my coach, includes:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

7. Also, I want you to know that:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

## ***Professional Coaching Agreement***

I understand that I am working with \_\_\_\_\_. for Professional Coaching at the agreed fee. I am paying this monthly retainer by check or Pay Pal prior to the beginning of the month. We will have standing scheduled times each week by telephone or meeting in person, as deemed most useful. Additionally, we may have other interim though limited exchanges by telephone, vmail, email, or for review of faxed material without additional charge. If there are special circumstances or events that require significant time or an additional session, we can renegotiate rates.

All information will be held as confidential unless the client requests otherwise in writing.

Professional Coaching is distinctly different from counseling, psychotherapy, and psychoanalysis, and does not deal with the diagnosis or treatment of emotional problems. I am not under the medical care of \_\_\_\_\_ and he is not acting as a therapist or counselor in this collaboration. Since Professional Coaching does not constitute medical consultation or treatment, any healthcare insurance does not apply.

These fees may potentially be considered deductible business expenses.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## ***Professional Coaching Preparation Form***

Date: \_\_\_\_\_

Your weekly update is a way to prepare yourself to get the most out of our time together. These documents are a way to regularly monitor yourself, for us to track progress collaboratively over time, and for me to review before our sessions.

Please e-mail or fax this form by the evening prior to the day of our session. Periodically, it may not be convenient if you are traveling or have other disruptions, so we will also create a process to set the agenda verbally for each session at the top of the time together that appointment.

1. What I have accomplished since our last session:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

2. What I didn't get done, but intended to do:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

3. Challenges and problems I am facing now:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

4. My best personal/professional opportunities now:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

5. I want to discuss during our session:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

6. What action steps I commit to doing before the next session one week away:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_



## ***Case Study: An Application of Live a New Life Story in an Unlikely Setting***

When Trevor began work with me in coaching, he spoke of life being like gambling, that it is primarily luck and fate. He had just experienced some setbacks in business that reinforced an old belief that there are some things over which you are entirely helpless. Although he recognized this assumption as a replay of his parents' attitudes, it didn't feel to Trevor that he was authoring his present stuckness. He likened it to gambling, due to luck and fate.

Rational minds advise against something as risky and intimidating as gambling. But I decided to explore his gambling metaphor to illustrate another possibility - that most components are not due to luck, just as in life. Gambling can be seen as a series of choices, as a metaphor to life choices. So I decided to invite myself into Trevor's metaphor. I spoke of my experiences playing blackjack.

I first shared an experience I had on a family vacation many years ago. We were on a cruise ship for part of our vacation and it was the first time my fourteen-year-old son had seen casino gambling. It intrigued both of us, and we decided to form a partnership for gambling. He couldn't participate actively, being underage, but he sat behind me as my "consultant," where he could directly view the action of the blackjack table and whisper strategy and directions in my ear.

This was a wonderful opportunity, I thought, for him to learn some principles of business. We decided to capitalize our venture at \$50, \$25 each. We knew we might have losses that could disillusion or stop us. We set aside some "bounce-back money," aware that the most common reason for the failure of small businesses is inadequate capitalization. We also decided that, no matter what our winnings were, we would never risk more than \$25 per night, half our initial investment.

We gambled for approximately an hour and a half each of six nights on the cruise. We agreed on when we would hold, when we would ask for another card, and when we would place more than our minimum bet. The value of having already established these principles became abundantly clear once we were at the table and emotion threatened to hijack our principles. On the two or three occasions when we abandoned our principles, we learned important lessons that served to firmly reestablish loyalty to our rules.

At the end of six evenings, we had seen about thirty people at our table come and go. Amazingly, only two or three of them actually came out ahead. We were, happily, ahead about 300 percent. We made the following observations about those who did not win and especially those who lost spectacularly: 1. They had no consistent principles or standards; 2. Those who appeared to have some standards abandoned them with sufficient emotional stimuli, such as a big win, a big loss, or a sustained streak of wins or losses; 3. Emotionally motivated behaviors always lost, including anger at losing, overstimulation from winning big, and afraid; and 4. They had no established end point for loss or gain.

I later learned that there was a statistically significant next best action, just as in business, for each of the card combinations of the dealer and player.

Every transaction from gambling to business is based on a relationship. So selecting a time, location, and dealer were important. With a positive relationship with a dealer, the player's success is perceived as the dealer's success as well. Conversation forms the foundation of that relationship. Tips when winning shares the profit, with larger tips when winning larger amounts. The dealer becomes invested in the player's success.

If a mindset, dealer, or table position is not working, you are free to cut losses, choose another, or stop playing. When you adhere to a "business plan" of when to bet, when to ante, and when to fold, reason rather than emotion of greed or fear do not prevail.

**Trevor constructed the following from our work.**

### ***Tips for Gambling (a.k.a., You Too Can Be Effective at Life)***

- *Don't let the game scare you.*
- *Everything you do is important*
- *If you play, there is a chance of success, and vice versa. Nothing ventured, nothing gained.*
- *You can shift the odds in your favor, e.g., by being at the right place at the right time.*
- *Think like whoever is in charge of the right place and time.*
- *Risk is necessary in order to succeed. You may have to risk more to succeed more.*

- 
- *There is more than one dealer - choose wisely.*
  - *You are free to walk away from a bad dealer.*
  - *A good relationship with a good dealer enhances your chance of success.*
  - *Share your winnings, as it encourages others to risk more.*
  - *Disclose your success in order to generate hope in those who need it.*
  - *Risk succeeding big.*
  - *Speaking your mind becomes your mind.*
  - *When you know something, you can never not know it again.*
  - *Old assumptions cannot generate new ideas.*
  - *Creativity is nurturing in itself, validating in its own right.*

**He contrasted these with the premise of his old story, in the metaphor of gambling:**

- *Don't gamble.*
- *Nothing ventured, nothing lost.*
- *If you must play, do it secretly to avoid giving the impression that you are in the game.*
- *Losing is safer and more predictable than winning; if you win, there is something to lose.*
- *Hide your winnings, as it makes people feel bad.*
- *The dealer is the dealer.*
- *The cards are the cards.*
- *Risk is risk.*
- *Who knows who runs the place?*

**From these two contrasting lists, he ventured a third list.**

***My Formerly Forbidden, Secret, Unspeakable Manifesto of What I Want.***

- *I want to use everything that I have.*
- *I want to like the surface as well as the depth.*
- *I want the surface to be continuous with the depth, and both are who I am.*
- *I want to be free to play at the surface.*
- *Therefore, I commit to:*
  - *Be in the best shape I can be*
  - *Become as healthy and attractive as I can be*
  - *Look in the mirror and admire who I see, surface and depth.*



# LITTLE THINGS COUNT

## (Or: How Two French Fries Weigh 40 Pounds)

Putting on 40 pounds over 10 years means gaining an average of four pounds per year.

- 40 pounds divided by 10 years equals 4 pounds per year. Four pounds divided by 12 months equals .33 (1/3) of a pound per month.
- This is approximately 1/100th of a pound per day (1/3 pound divided by 30 days).
- One pound of stored fat represents 3500 calories.
- 3500 times 1/100 equals 35.
- To achieve the feat of gaining 40 pounds in 10 years, all you have to do is consume an extra 35 calories every day.
- 35 calories = two regular French fries

Little things count.

People generally diet backwards. They regularly eat and exercise poorly, then do a binge diet. If you have good habits on a regular basis, you can cheat (binge) at times such as holidays. It's what you do day in and day out that makes or breaks wellness.

Develop the habits that move you toward your goal. You have to have a system. Repetition is the mother of learning.



# Life Story Glossary

**Change.** To modify or convert from past to present. Or back again—such as the “system restore” of a midlife crisis when someone who has previously altered a value system in order to succeed in a competitive corporate environment shifts back to what is more authentic. Change uses the past as a point of reference to alter recognizable patterns; reinvention focuses on now and the future, to create a new story. A new story can move problem to possibility, obstacle to desire. The key element in writing a new story is to design the story from what is possible rather than what has existed in the past.

*No human quality is beyond change. (Daniel Goleman)*

**Choice Architecture** — The determination of informed choice, and the recognition that each moment’s choice is actively determined. Choice Architecture involves the recognition that you write your own story, own it, can assess it, and decide the choice generated each moment. Mentor Coaching collaborates with clients to help them make the most informed choice possible moment by moment. Choice Architecture helps someone understand how the mind and brain work in order to create optimum maps and paradigms in order to make informed, strategic choices.

*It’s taken me most of my life to know which notes not to play.  
~ Dizzy Gillespie, the great jazz trumpeter*

**Concessions.** Something an individual puts up with that takes time, energy, peacefulness, or money in a recurring, unsatisfying way. Concessions are in four major arenas: physical, emotional, relationship, and financial. Concessions at home include such things as physical repair needs, cleaning needs, messiness, or noise boundary violations. Concessions in work life can be inadequate space, wrong field of work, poor communication, lack of mission, improper technology, or dysfunctional hierarchies. Concessions regarding family, friends and colleagues include imbalance of support or friendship, blurred boundaries, misunderstandings, or the need to change fundamental agreements. Concessions usually result from procrastination, conflict avoidance, or creating a certain appearance.

*Nothing prevents our being natural so much as the desire to appear so.  
(Francois La Rochefoucauld)*

**Emotional Economics®** — The study of the interactions of mind and brain impacting money behavior and financial decisions. Emotional Economics® integrates and applies developmental psychology, neuroscience, and quantum physics with strategic coaching principles to understand and remedy money mistakes and financial fallacies. The study of Emotional Economics® incorporates the principles of understanding how the mind and brain work in order to revise mind software and rewire brain hardware regarding money behavior and financial decisions.

*Our core beliefs and emotions require a portal of expression, a path to the tangible.*

**Empathy.** A listening perspective positioned inside the experience and subjective reality of another. This attunement with another’s internal experience permits appreciation of that person’s own framework of thinking, feeling, and meaning. Empathy is resonance, not sympathy, commiseration, or condolence. Empathy positions one foot in the shoe of another’s experience without losing any of oneself. Empathy is neutral—equidistant between two sides of a conflict—not knowing what that person’s answer will be, and not needing for it to go one way or another. An empathic failure results in another’s hurt (often quickly repaired by anger—a reaction to the helplessness of not being understood).

*Could a greater miracle take place than for us to look through each other’s eyes for an instant? (Henry David Thoreau)*

**Explicit and implicit learning.** Acquiring conscious, specific, and focused content is referred to as explicit learning. Explicit learning focuses on data and factual information. Implicit learning takes place outside awareness. Implicit learning includes a body memory such as riding a bicycle, or a procedural memory such as complex behavioral patterns; for example, a parent who repeats with children the same behavior or attachment pattern experienced as a child. Implicit learning and memory operate in the flow of a process, so you ultimately don’t have to think about it each time. A “choke” or “slump” can be associated with a switch from implicit to explicit processes.

*What is remembered is what becomes reality. (Patricia Hampl)*

**Ideal.** An internal standard of excellence. Ideals serve as a personal model of value—an internal guide of purpose and principles. Examples of ideals include to



relate, to create, to teach, or to contribute. Living up to a personal, attainable ideal generates self-esteem. Integrity results when ideals are respected and protected. Shame results when ideals are not being attained—or when there is no tangible evidence of what “good enough” is:

*Ken Townsend’s mother, after reading that Townsend won an English prize said, “There must be some mistake.” Townsend “. . . took her remark as proof that whatever I did, it would not be good enough.” (Raritan magazine)*

**Internal point of reference.** Ownership of one’s life story: the self as the source of initiative, esteem, and regulation. Autonomy to become one’s own authority allows someone to fully realize passion and potential. Examples of an external point of reference—of not being one’s own authority—include passive language: “Anger seized me;” or “I came to an impasse,” or “My mind played tricks on me.”). Other examples are external pressure words: “Have to. . .” “Ought to. . .” “Should. . .” Or the direct abdication of one’s own initiative: “You made me feel that way.” Dependence on others as well as perpetual defiance of authority, indicates ongoing struggles with autonomy.

*Both conformity and opposition occupy the same prison. (David Krueger, Destiny)*

**Intuition.** A nonrational way of knowing, related to body-based wisdom. An impression, gut feeling, hunch, flashing image, or fantasy may occur before someone knows what to think. Intuition is imaginative, sometimes surprising.

*Intuition is the source of all scientific knowledge. (Aristotle)*

*But what would happen if we took our instincts seriously? . . . We would end up with a different and better world. (Malcolm Gladwell)*

**Mental Models** — A representation of external reality inside your head. A Mental Model attempts to understand knowledge and principles about the world. We each have several Mental Models—or mindsets—inside our heads. A Mental Model is a way to identify core principles and organizing concepts to make a story from isolated facts. A Mental Model needs to come from multiple disciplines, as one discipline cannot encompass all the necessary wisdom. If

physicians or philosophers stick to their own model, their understanding of the real world would be limited. Mental Models are simply stories—stories composed of metaphors that explain both tangible and intangible. If we don't have enough Mental Models we tend to overuse the ones we have. To a man with a hammer, every problem looks like a nail. Mental Models are stored in the hippocampus, the brain's memory focal point.

*Alice came to a fork in the road. "Which road do I take?" she asked.  
"Where do you want to go?" responded the Cheshire cat.  
"I don't know," Alice answered. "Then," said the cat, "it doesn't matter."  
(Lewis Carroll)*

**Mirror Neurons** — Mirror Neurons are a function of actual networks in different parts of the brain that reflect the behavior or feelings of others. We unconsciously imitate what we witness, ranging from movement, to behavior patterns, to yawning. Mirror Neurons help us directly and indirectly imitate actions and create experiences. Stick out your tongue at a newborn baby, and the baby will immediately return the gesture. A baby smiles and her mother smiles back. Mirror Neurons are instrumental in acquiring empathy, language, and social behavior. This mirroring activity explains how children download beliefs and behaviors beginning in the first years of life. We experience and take in how our parents handled money—the behaviors, messages, attitudes, biases, meanings, and regard of money. Mirror Neurons help us understand emotional and social contagion.

*A loving person lives in a loving world. A hostile person lives in a hostile world. Everyone you meet is your mirror. (Ken Keyes, Jr.)*

*Tell me what you pay attention to and I will tell you who you are.  
(Jose Ortega y Gasset)*

**Money Story.** People breathe life into money and give it personal meaning to make it a story. Otherwise, money is only a fact—a piece of paper or set of digits. People create internal and external conversations about money. Some of the money issues are really about money, but many are about other matters, private or even secret, hitchhiking on money. Money is simple, yet so complicated because some important aspects are emotional, unspoken, and unconscious. For example, self-statements equate money with worth, esteem, opportunity, obstacle, desire, or competition. Money is used to regulate feelings, affirm accomplishment, assuage



guilt, or create attachments. Every important relationship, including money, has its own history, develops its own story, and evolves its own language.

*I don't know how to tell my money story to myself in order to see what elements need to be changed. (Jeremy Tarcher, Publisher, Personal Communication)*

**Narrative.** The basic components—the running commentary—of a life story that comes alive in various ways. Narratives include not only the themes of verbal expression, but also body language that expresses feelings in psychosomatic lexicon, and recurring behavior patterns. A life story unfolds through its narration. Personal narratives, unlike other narration, may not be announced directly. Some of the narrative may be left out, invisible to the speaker; the narrator may not be fully aware of the story he's telling.

*Myths are the stories we tell ourselves to explain the world around us and within us. (Pamela Jaye Smith)*

**Needs.** An essential requirement for mind, body, or spirit. Earlier in life, needs include physical nurturance, empathic attunement, attachment, effectiveness, exploration, assertion, feeling and tension regulation, and sensory requirements. An adult version of those same basic needs exists, such as providing for physical requirements, comfort, identity, affirmation, love, communication, safety, mastery, freedom, and sexual/sensual needs. When a need is met, a sense of effectiveness and optimum functioning results.

*Needs and values form core themes of personal story plot. An unmet need results in someone getting sick. (Henry Miller)*

**Neurogenesis** — The creation of new brain cells. With new experiences, new neuronal cells as well as pathways are generated throughout our lives. Neurons are both flexible and regenerative. The new brain cells connect with existing circuitry and developing networks to enhance function, such as memory. Two things above all other create neurogenesis: an enriched environment (intellectual and emotional stimulation) and exercise. Another finding: chronic stress impairs neurogenesis.

*Life isn't about finding yourself. It's about creating yourself.*  
(George Bernard Shaw)

**Neuroplasticity** — The capacity of the brain for creating new neural connections and pathways in response to experience. Neuroplasticity can occur throughout the life span. Neuroscience has demonstrated that the emotional and mental changes we craft by the process of “mind sight” transform the physical brain. By focusing on our experience we can sculpt neural pathways, and stimulate the growth of aspects of the brain crucial to well-being. Neuroscience shows us that we can grow these new connections throughout our lives. One of the most exciting and revolutionary discoveries in the last few decades is this: how we specifically focus attention shapes the actual structure of the brain. The brain never stops growing in response to new experiences.

*You become what you give your attention to. (Epictetus 55-135 A.D.)*

**Perception.** The process of how we select, register, and attach meaning to experiences. Someone registers information and experience that fits an existing belief pattern, and ignores or disbelieves what doesn't fit that pattern. Two people with different cognitive styles can stand shoulder to shoulder viewing the same scene, then later describe it in ways that sound like two different events. Our inner beliefs determine our experience of what surrounds us; our interpretation becomes our story, which becomes our reality.

*The percentage of Americans who believe they are in the richest 1% of the population: 19%. (Peter Strupp)*

*One day our descendents will think it incredible that we paid so much attention to things like the amount of melanin in our skin or the shape of our eyes or our gender instead of the unique identities of each of us as complex human beings. (Franklin Thomas)*

**Plot.** The skeleton of a life story that gives it structure, purpose, and pattern. A unique set of individual beliefs, consequences, and relationships that determines how one creates experiences. The plot is the arc drawn across the themes and storylines of an entire life narrative. Plot dictates what one looks for, how one perceives, and how one assigns meaning to an experience. All subsequent information is absorbed through that narrative plot. Basic beliefs and core assumptions generate experiences, behaviors, and meanings. All components of a life, business, or career story can evolve to a cohesive narrative and an organized coherent plot of action goals, strategic development, and results. Often an individual plot goes unquestioned because someone takes it for granted



and remains unaware of its existence as an organizing model.

*Those who do not have power over the story that dominates their lives, the power to retell it, rethink it, deconstruct it. . .and change it as times change, truly are powerless because they cannot think new thoughts.*  
(Salman Rushdie)

**Premise.** An organizing proposition upon which a story is based. The preliminary statement of story purpose keeps the reader from straying from the storyline while fully and richly developing the plot. Certain fundamental propositions upon which life stories are based include parentage, social class, looks, and race. America lets one work out of some premises, such as social class. For example, the greatest reason people don't earn and keep a lot of money is the premise that they don't see themselves capable of it. Still other premises, such as one based on early childhood abandonment, powerfully affect subsequent relationship expectations.

*The universe is made of stories, not atoms. (Muriel Rukeyser)*

**Psychological symptom.** A somatic story authored by emotions. A symptom both reveals and conceals, making obvious to others what one hides from oneself, simultaneously attempting to engage and to flee. Symptoms give disguised voice to what their creator avoids knowing, a secret hiding in the open. A symptom is a component of a story that needs, indeed begs, to be told in its entirety, listened to rather than silenced artificially, respected rather than disregarded. It speaks literally: a pain in the neck, purging something, weeping skin, hypertension. As a story with its own history, dynamics, and meanings, a symptom answers a question not asked consciously; it will be repeated until translated.

*It is easier to fall ill than learn the truth... so take care of your maladies  
... they always have something to tell you. (M. Pavic)*

**Reinvention.** To create or compose different life story experiences. A process that begins with taking ownership of a life story, rather than living out what just seems to happen, or feeling victimized by forces beyond our control. The key element in writing a new story is to design the story from what is possible, rather than from what has existed in the past.

*I am astonished I could let go of the drama of being a suffering artist.  
Nothing dies harder than a bad idea. (Julia Cameron)*

**Resistance to change.** Both mind and brain become conditioned to respond in recurring patterns. There are always the pull of the old and the fear of the new. Yet there is only a redundant future in repetition. Any departure from the familiar, even a positive one, creates anxiety and uncertainty. We repeat behavior that doesn't work because it offers security and familiarity. Doing the same thing results in a known outcome, and we can mistake predictability for effectiveness, trade freedom for safety, or forego aliveness for certainty. Overcoming resistance to change by creating new experiences literally changes the neuronal networks and neural nets within the brain.

*History doesn't repeat itself, but it does rhyme. (Mark Twain)*

**Secrets.** To hold onto something, to continuously engage by sequestering, reserving its place frozen in time. The possibility of telling beckons relinquishment of what the secret holds, threatens to unleash the feelings packaging it, and adumbrates dissolution of the illusion that is part of the secret. The threat of exposure risks stripping away everything pertaining to the secret, especially its companion hope. Someone can engage something the first time by denying it. People can tell themselves secrets out loud by symptoms. Speaking secrets out loud in words distinguishes the present from the past (a secret is always about the past, because it exists in a time capsule).

*The only secrets are the secrets that keep themselves. (Emerson)*

**Self-empathy.** Self-empathy makes your self the focus of your attunement and resonance. Self-empathy is more difficult than focusing on another person, especially if you are unaccustomed to taking yourself as a point of reference and have been a caretaker of others to the partial exclusion of yourself. Being empathic with yourself is the same process as being attuned to others, only with yourself as the focus. Your feelings need to have a receiver (you), have an impact and become known (by you), and be metabolized (by you).

*If you look deep enough inside yourself, you'll see everyone else.  
(Kinky Friedman)*

**Self-statement.** A unique, personal communication of experience and point of view. What people say and do are inevitable, unavoidable self-statements of their beliefs and personal realities. Individuals actively construct their experiences. Narrative and plot reflect individual assumptions and self-concept. A life story manifests



through self-statements, from broad themes such as success, to simple statements such as melancholy that sees and forecasts unhappiness. People believe according to their self-images; views are self-statements of our perception. All that you say is about yourself.

*Every man's work, whether it be literature or music or pictures or architecture or anything else, is always a portrait of himself.  
(Samuel Butler (1835-1902) English Writer)*

**State of mind.** A psychophysiological (mind-body) state, with an internally organized software program of expectations, attitudes, meanings, and emotions. Each state of mind has its own developmental history, its own expectations to filter and organize perception and attribute meaning. Each person has different states of mind, with more awareness of some than others. A normal range of mind states includes calm relaxation, focused alertness, or worried anticipation; some states have a predominant feeling such as excitement, fear, anxiety, or euphoria. Each state of mind, like a software program, determines access and expression of memory, emotion, thinking, and behavior. Within a particular state of mind people perceive, remember, feel, think, behave, and respond in a consistent mode.

*The mind seems to embrace a confederation of psychic entities.  
(William James)*

**Storybusting.** Although people are neurologically and psychologically conditioned to relate to the world in a preprogrammed repetitive way, change can occur. An internal working model can be transcended. This is storybusting. The usual solutions may no longer work.

*And what happens when the stories we have relied on our whole lives stop making sense? (What The Bleep Do We Know!?)*

New information may not fit into the existing framework, and ultimately can't be ignored.

*For centuries, no one believed a human being could run the mile in less than four minutes. In 1954, when one man busted that story, the perception of reality and possibility changed. Within months of Roger Bannister's breaking the four-minute mile, several others did so as well, and today it is commonplace. The obstacle of the impossible could no longer be constructed.*

**Storyline.** The basic themes, or subplots, of a life story plot. Each storyline has its own history, its own consistency over time, its own assumptions and motivations. The perceptions and suppositions within a storyline become evident in behaviors. A storyline is the manifestation of beliefs, since one always finds or creates that which validates basic theories. Some of the major storylines of literature and life include entitlement and privilege, redemption through caring for others, hard work brings prosperity and dignity, and penance absolves earlier mistakes. The victim always finds ways to suffer; someone who is hopeful will always create possibility and live into it.

*The unconscious speaks more than one dialect. (S. Freud)*

**Story Metaphor** — The metaphor constructing a life or money story is based on the premise that whatever you think, feel, and experience is what you create each moment. You construct your entire story; every element of experience is created. Consider the different perspective in saying “I am sad” versus “I feel sad.” “I am sad” is a self-definition that both defines and limits. “I feel sad” is the recognition of the act of creating a feeling, and the inherent recognition of being able to create other feelings as well. The choice architecture of each moment actively constructs story narrative. To focus on and see story construction accepts not only creation but also establishes transformation possibilities.

*Money is the one true metaphor, the one commodity that can be translated into all else. ~ Dana Gioia*

**Success intoxication.** To become enmeshed in the escalating pursuit of success and become lost in its stimulation and affirmation. Indications of success intoxication: a reliance on the extremes of accomplishment; accelerating success with heightened metrics; an evolving erosion of other important matters to the process leading to success; blurred boundaries between work and personal life. The stimulation of extreme success, such as in business or athletic endeavors, can make it harder to regulate emotions and stay grounded in values and identity.

*Success has made failures of many men. (Cindy Adams)*

**Success phobia.** A disturbance of a person’s ability to comfortably handle achievement. Those who have the opportunity, intelligence, and imagination to



succeed but do not live up to their potential, or suffer when they do, reveal an internal rather than external impediment to success. Success can be avoided in any areas of life—academic, vocational, marital, sexual, and parental, to name a few. Fear of success manifests in so many ways that it often goes unrecognized. Three basic areas of phobic avoidance are avoidance of the final step to success (“I always stop just short of my goals,” known as choking), erosion of successful accomplishment (a take-away after success to spoil its enjoyment), and ambition without goal setting (“I can’t set a specific goal”).

*We have met the enemy—and he is us. (Walt Kelly)*

**Transference.** The active organizing process of the mind to understand a present experience, but necessarily relying on existing software. What we expect in the present tells us instantly what has happened in the past. Relationships with original caretakers establish a story premise of expectations and patterns. When neuronal networks and neural pathways activate, the basic storylines unfold. Transference is most obvious with a stereotypic or irrational response, such as currently reacting to a spouse in the same way as toward a parent in childhood. Unless shaped and changed by revision, repetition ensures a replay of the old story.

*You tricked me out of feeling solitary by being others for me.  
(Clive Wilbur)*

**Visualization.** A scenario of the experience of arrival at a destination, such as the successful actualization of a goal. An author visualizes a scene and conveys it to the readers in such a way that they live into the process of being there. Constructing a vision gives hope possibility—a shape and form. Vision crystallizes an achievement into a full sensory experience and context in mind and brain. An individual inhabits the experience of a vision as guide to creating it. A vision serves as inspiration to design ways of realizing it. The most successful businesses have a vision that is also ubiquitous for each person in the organization.

*A vision leads you to it.*

**Wants.** Wishes and desires. Wants are replaceable with other wishes, and fantasies are interchangeable, but one need cannot substitute for another need. Old unmet needs manifest as present wants, such as a childhood need for affirmation leading to relentless adult pursuit of validation trophies and driven accomplishments. A need cannot be suppressed or segmented from awareness for very long. The

frustration of a wish, such as the expectation of a gift, can lead to disappointment. While needs are universal, wants are tied to uniquely personal experiences and have their own particular history.

*I know what I am fleeing from, but not what I am in search of.*  
(Michel de Montaigne)

**Work addiction.** An unrestrained, unfulfillable internal demand for constant engagement in work, and a corresponding inability to relax. A “workaholic” is incessantly driven, relentlessly active. Work is the one organizing and effective activity. Inactivity or activity other than work may give rise to guilt, anxiety, or emptiness. Some individuals view work as the only area in which they can establish and maintain their identities, feel effective, and enjoy feelings of importance, validation, and affirmation. Others may use work to counteract underlying feelings of inadequacy and ineffectiveness. Working passionately, long and hard, and deriving satisfaction, does not make someone a work addict.

*An addiction is something you can't do without, yet it is a promise never kept.*



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# *Life Story Glossary*



# Live A New Life Story®

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Integrating insights from psychoanalysis and neuroscience with strategic coaching, *Live a New Life Story® The Owner's Guide* mentors life story transformation.

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**David Krueger, M.D.** is an Executive Mentor Coach, and CEO of MentorPath®, an Executive, Coaching, Training, Publishing, and Wellness Firm. He is also Dean of Curriculum and Mentor Coach for Coach Training Alliance.

Author of 16 trade and professional books on success, wellness, money, and self development, and 75 scientific papers and book chapters, his coaching and writing focus on the art and science of success strategies: mind over matters. Dr. Krueger founded and served as CEO for two healthcare corporations, and founded a third start-up that went from venture capital to merger/acquisition. He formerly practiced and taught Psychiatry and Psychoanalysis, and was Clinical Professor of Psychiatry.

His most recent book, *The Secret Language of Money* (McGraw-Hill), is a Business Bestseller, and has been translated into 10 languages.

