

## What it is

A process for planning any significant personal change

## What it can do

This tool can assist you to:

- Translate your desire for change into a realistic plan
- Significantly increase the likelihood of success in making the change
- Gain confidence that you can make positive changes in your work and life
- Help those you coach in making personal changes

## How it works

The digital version of this PDF form can be filled out using Adobe Reader. It is available at: [stproject.org/resources/tools-for-transformation](http://stproject.org/resources/tools-for-transformation)

This tool can be used to:

1. Help you plan and guide your own personal change or
2. Assist people you coach in making change in their lives

**Step 1** Define the Change.

- Why is it important to you? (**P**urpose)
- What will be different? (**O**utcomes)

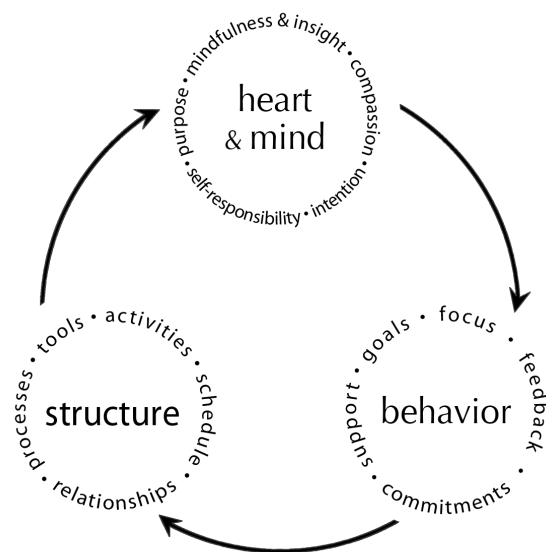
**Step 2** Plan the change through the three lenses of the Wheel of Change (**P**rocess):

- Heart & Mind
- Behavior
- Structure

**Step 3** Establish ways to measure and track your progress

**Step 4** Review the 5 Tips for Success

**Step 5** Track your progress and revise your plan as needed



<b>The Change I Want to Make</b>	
<b>P: (Purpose)</b> Why am I working on this?	
<b>O: (Outcome)</b> What outcomes do I want? What will be different?	
<b>P: (Process)</b> How will I go about implementing these changes?	
<b>Heart &amp; Mind:</b> What needs to shift in the way I think and feel?	
<b>Behavior:</b> What needs to change in the way I act?	
<b>Structure :</b> What external changes do I need to make in my world?	
<b>How I will track my progress:</b>	

**Example 1: Limiting speaking engagements**

<b>The Change I Want to Make</b>	To limit my increasing number of speaking engagements without offending allies
<b>P: (Purpose)</b> Why am I working on this?	I need to cut back on my work – too many engagements; too much travel.
<b>O: (Outcome)</b> What outcomes do I want? What will be different?	A less stressful, less exhausting schedule with fewer speaking engagements and less travel.
<b>P: (Process)</b> How will I go about implementing these changes?	
<b>Heart &amp; Mind:</b> What needs to shift in the way I think and feel?	<ul style="list-style-type: none"> <li>• Set a clear and compelling personal vision for change</li> <li>• Fully align behind the vision. Deal with my: <ul style="list-style-type: none"> <li>- needing to be needed</li> <li>- fear that if I say 'no' I may never get more invitations</li> <li>- guilt about saying "no"</li> </ul> </li> </ul>
<b>Behavior:</b> What needs to change in the way I act?	<ul style="list-style-type: none"> <li>• Communicate to others about the huge increase in requests</li> <li>• Turn down requests by saying: <ul style="list-style-type: none"> <li>- "I am only able to make XX speaking engagements this year, and have already committed to those."</li> </ul> </li> </ul>
<b>Structure:</b> What changes do I need to make in the "externals" of my life: my schedule, responsibilities, tools, outside support, personal systems and processes, etc.	<ul style="list-style-type: none"> <li>• Set very clear guidelines for my assistant re: <ul style="list-style-type: none"> <li>- how many gigs</li> <li>- how much travel</li> <li>- criteria and prioritization for selection</li> </ul> </li> <li>• Establish a high fee structure for talks that will eliminate many requests (but have a fee waiver process to allow politically important ones back in)</li> <li>• Enlist my partner as a sounding board around which gigs to take, and also go to her for support when I feel badly about saying "no."</li> </ul>
<b>How I will track my progress:</b>	<ul style="list-style-type: none"> <li>• Implement the new structures within 3 weeks.</li> <li>• My assistant will track my speaking gigs, and we will do quarterly check-ins to ensure that I am on target for the guidelines we set.</li> </ul>

**Example 2: Getting more exercise**

<b>The Change I Want to Make</b>	Start getting sufficient exercise
<b>P: (Purpose)</b> Why am I working on this?	I feel better when I exercise, have more energy and it's better for my health.
<b>O: (Outcome)</b> What outcomes do I want? What will be different?	Regular aerobic exercise plus regular yoga practice. I feel strong in my body and have more energy
<b>P: (Process)</b> How will I go about implementing these changes?	
<b>Heart &amp; Mind:</b> What needs to shift in the way I think and feel?	<ul style="list-style-type: none"> <li>• Do some self-reflection. Understand why I've been inconsistent in the past; learn what I might do differently this time.</li> <li>• Do alignment coaching with myself: I need to have exercise feel more like something I want to do than something I should do. (See Coaching for Alignment tool at <a href="http://www.stproject.org">www.stproject.org</a>)</li> </ul>
<b>Behavior:</b> What needs to change in the way I act?	<ul style="list-style-type: none"> <li>• Commit to yoga class once a week and one 30-minute practice session at home.</li> <li>• Go to the gym twice a week.</li> <li>• Commit to <i>Zumba</i> class once a week.</li> <li>• Block out my new exercise routine in my calendar.</li> </ul>
<b>Structure:</b> What changes do I need to make in the "externals" of my life: my schedule, responsibilities, tools, outside support, personal systems and processes, etc.	<ul style="list-style-type: none"> <li>• Find a yoga class closer to home.</li> <li>• Buy a DVD yoga class to practice with at home as I find it hard to do it on my own without structure.</li> <li>• Find an exercise buddy who will go to the gym with me. I seem to do better with company.</li> <li>• Renegotiate car pool for picking up the kids so I can exercise at the end of the work day.</li> <li>• Without making her responsible for my success, it would help for my partner to once a week check in with me and ask how I'm doing.</li> </ul>
<b>How I will track my progress:</b>	<ul style="list-style-type: none"> <li>• Minimum standard: 3-4 exercise periods weekly.</li> <li>• Start next week with one yoga class and one trip to the gym. Move to full program the following week.</li> <li>• Create and maintain a checklist to track my exercise.</li> <li>• Review monthly and reassess.</li> </ul>

## **Making Personal Changes: Five tips for success**

Gym memberships skyrocket every January. But 80% of new members drop out within 30-60 days and less than 5% stick with their exercise goals.

It can be disheartening to make promises to yourself about what you're going to do differently, only to watch yourself fail to follow through.

Here are some tips about how to succeed in your personal change plans.

### **Tip #1: Consider time-limited experiments**

It's psychologically easier for most people to try out a change for some defined period of time rather than committing to new behaviors for the rest of your life. For example:

*For the next month I will put in my calendar twice-weekly three-hour blocks of time for writing during which I will turn off my email and texts.*

Experiment with changes for however long you decide, then stop and evaluate how things have gone, readjust, and commit to another (possibly longer) period.

### **Tip #2: Plan for short, easy victories**

When we have a success, it provides us with confidence and energy to stay the course. For example:

*I want to change my habit of avoiding difficult conversations. I will begin by choosing a conversation that's only a little difficult, rather than starting with the one I've been dreading for over a year. I will then schedule my backlog of challenging conversations, doing one every few weeks until I am caught up. (And have developed a new habit of not putting them off.)*

### **Tip #3: Celebrate success with rewards**

Neurobiology has shown that one of the powerful ways to support developing new habits is to provide regular rewards, however small, for every success. With repetition, our body begins to release pleasurable endorphins even without the reward. For example:

*If you want to develop a habit of jogging regularly, give yourself a simple reward each time you finish—a small piece of chocolate, a cup of tea, etc. Over time, your body will start releasing endorphins by the time you have laced up your sneakers. And it gets easier and easier to motivate yourself to jog.*

### **Tip #4: Forgiveness when you fail**

If you are making a significant personal change, especially if it requires developing a new habit, you will likely screw up from time to time. It's a normal part of learning something new, but feeling badly about ourselves doesn't help at all. In fact, self-judgment typically de-motivates us. Research shows that self-compassion is directly related to achieving goals.

*When you fail to do it “right,” think about how you would offer comfort to a friend who was disappointed or frustrated by their lack of success. Offer yourself the same reassuring, comforting words.*

**Tip #5: Use measurements**

At work, we understand the need for metrics to help drive success. The same holds true in trying to make personal changes. Clearly define success and find some ways to measure progress as you go. Galileo said: “Measure what is measurable and make measurable what is not so.” Be creative. For example:

*There is considerable research showing that the way to get the best performance from people you supervise is to maintain a minimum proportion of 4:1 positive to corrective feedback. Numbers of leaders whom I have coached have focused their attempts to change their behavior by actually tracking each day on a chart the number of positive reinforcements they deliver to their key staff.*

May these tools and tips help you and those you support to create change in your own lives and in the world.