

## What It Is

A process for planning any significant personal change

## What It Can Do

This tool can assist you to:

- Articulate the purpose, desired outcomes, and process for implementing a personal change.
- Increase likelihood of successful implementation by addressing all three domains of the Wheel of Change.
- Help clients in making personal changes.
- Make your own personal changes.

## How It Works

The digital version of this PDF form can be filled out using Adobe Reader.

**Option 1:** Guide the client through the steps in a coaching process.

**Option 2:** Introduce the tool to the client, and invite them to fill it out on their own.

**Step 1** Define the Change.

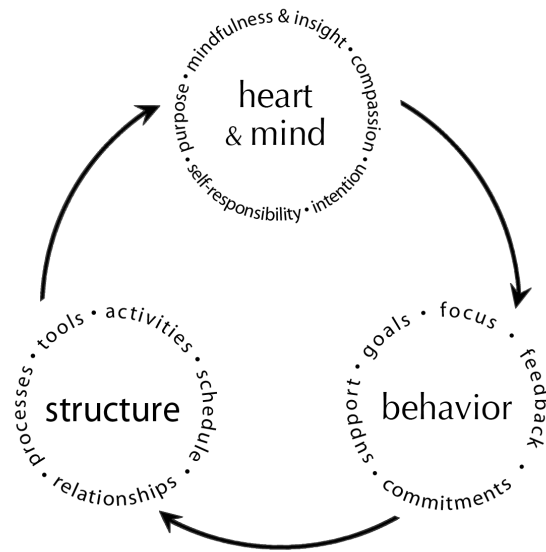
- Why is it important to you? (**Purpose**)
- What will be different? (**Outcomes**)

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

- Heart & Mind
- Behavior
- Structure

**Step 3** Set benchmarks and timeframes to support follow-through.

**Step 4** Recalibrate your plan as necessary.



<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 (Process):</b> What needs to shift in the way I think and feel?	
<b>Behavior (Process):</b> What needs to change in the way I act?	
<b>Structure (Process):</b> What external changes do I need to make in my world?	
<b>Performance measures:</b> Performance measures I will use (e.g., benchmarks, timeframe)	

**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 (Process):</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 (Process):</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 (Process):</b> What external changes do I need to make in my world?	<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> </ul>
<b>Performance measures</b> Performance measures I will use (e.g., benchmarks, timeframe)	<ul style="list-style-type: none"> <li>• I will 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.</li> </ul>

**Example 1: Getting more exercise**

<b>The Change I Want to Make</b>	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 (Process):</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: I need to have exercise feel more like something I want to do than something I should do.</li> </ul>
<b>Behavior (Process):</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 Zumba class once a week (It's more fun exercise than the treadmill.)</li> <li>• Create and maintain a checklist to track my exercise.</li> <li>• Block out my new exercise routine in my calendar.</li> </ul>
<b>Structure (Process):</b> What external changes do I need to make in my world?	<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 from childcare so I can exercise at the end of the work day.</li> </ul>
<b>Performance measures</b> Performance measures I will use (e.g., benchmarks, timeframe)	<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>• Review monthly and reassess.</li> </ul>