

Aligning Values and Transition Client Workbook

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Purpose

This tool is designed to help clients explore their core values as they relate to a transition they are preparing to enter. This allows the clients to gain clarity on how to navigate change in ways that are in alignment with their values.

Benefit

People tend to focus on the aspects of the transition and the actions needed to make it happen. By looking at the foundation of the transition, clients can make sure that how they view and approach the change honors what they value. Clients will then experience higher levels of fulfillment during the process and establish habits which are easily sustained.

How to Use This Tool

While it is best to use this tool at the early stage of the transition conversation, it can be used at any point the coach feels a values alignment is necessary. The tool is set up to walk the client step-by-step through the process. Here is an overview of the steps and the purpose for each one:

Part A: Values Exploration

- Identify the client's top five core values and define what they mean and why they are important.
- Create a picture of what honoring each of the top values looks like in words, actions, beliefs, and focus.

Part B: Aligning Values with the Transition

- As it relates to the transition, change, or goal, the clients explore how they would approach the situation in ways that honor the core values.
- After the transition is complete, the clients describe how they will continue forward in ways which honor their core values and maintain their energy and momentum.

Aligning Values and Transition Workbook

Everything we do and the decisions we make are often driven by what we value most in life. When the actions we take are aligned with our values, it is easier to find the sweet spot where our motivation, levels of satisfaction, and sustainability of success are high. The purpose of this exercise is to gain an understanding of your most important values as they align with the change or transition you are exploring.

PART A: Values Exploration

Before we begin to look at your specific transition goal, let's first identify your top values. Look at the list below and circle your top five non-negotiable values. These are the values you choose to guide everything you do and want to honor at all times.

Accountability	Conflict	Friendship	Love	Reputation
Achievement	Continuous Learning	Fun	Loyalty	Resolution
Adaptability	Contribution	Future Generations	Making a	Respect
Adventure	Courage	Growth	Difference	Responsibility
Ambition	Creativity	Happiness	Meaningful Work	Risk-Taking
Authenticity	Curiosity	Health	Openness	Safety
Authority	Determination	Honesty	Optimism	Security
Autonomy	Dialogue	Humility	Patience	Self-Discipline
Balance	Ease	Humor	Peace	Self-Respect
Beauty	Efficiency	Independence	Perseverance	Service
Boldness	Ethics	Influence	Personal Growth	Spirituality
Caring	Enthusiasm	Initiative	Pleasure	Stability
Compassion	Entrepreneurial	Inner Harmony	Poise	Success
Competence	Environment	Integrity	Popularity	Status
Challenge	Excellence	Job Security	Positivity	Teamwork
Citizenship	Fairness	Justice	Professional	Trustworthiness
Clarity	Faith	Kindness	Growth	Vision
Community	Fame	Knowledge	Recognition	Wealth
Compassion	Financial Stability	Leadership	Reliability	Wellness
Competency	Forgiveness	Learning	Religion	Wisdom

In order to understand the root of your core values, take a moment to define your values by writing out why they are important to you.

Value 1: _____

Definition: _____

Importance: _____

Value 2: _____

Definition: _____

Importance: _____

Value 3: _____

Definition: _____

Importance: _____

Value 4: _____

Definition: _____

Importance: _____

Value 5: _____

Definition: _____

Importance: _____

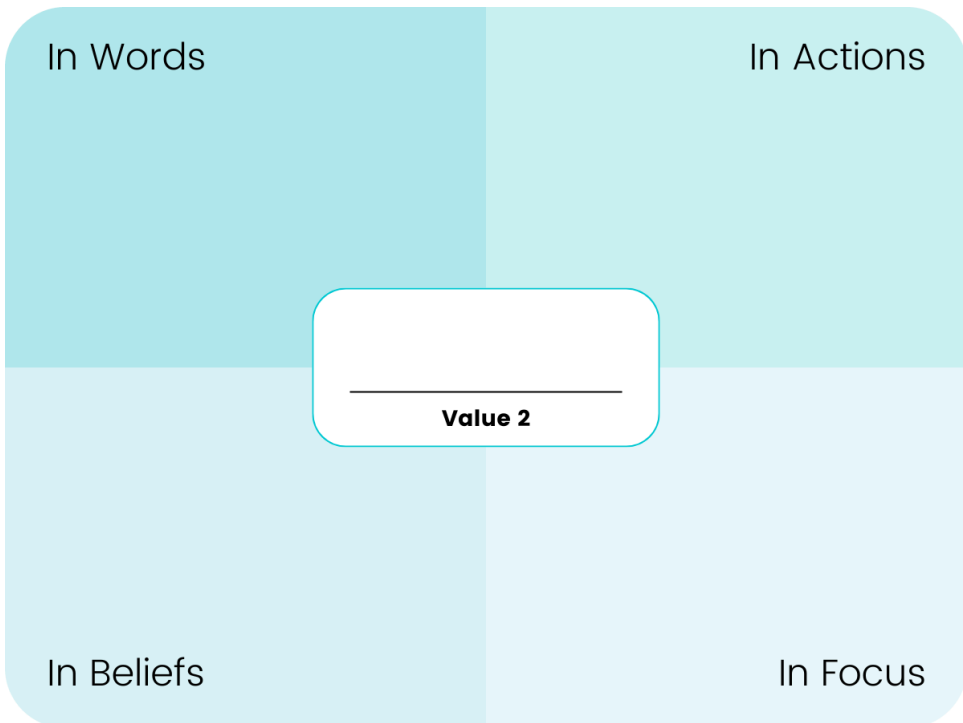
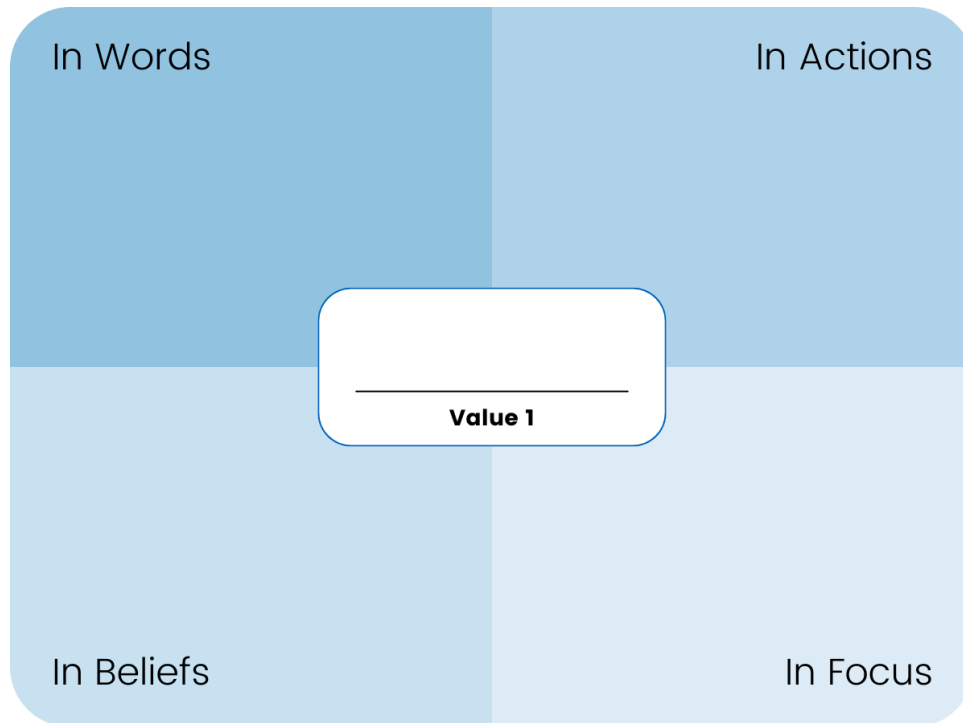
Let's explore your values at a deeper level and get a picture of what it means to walk the talk. Use the charts below to list or describe what it would look and sound like when you are fully honoring these values. This will be especially important as we begin talking about your transition. For now, think about them in your day-to-day activities and interactions.

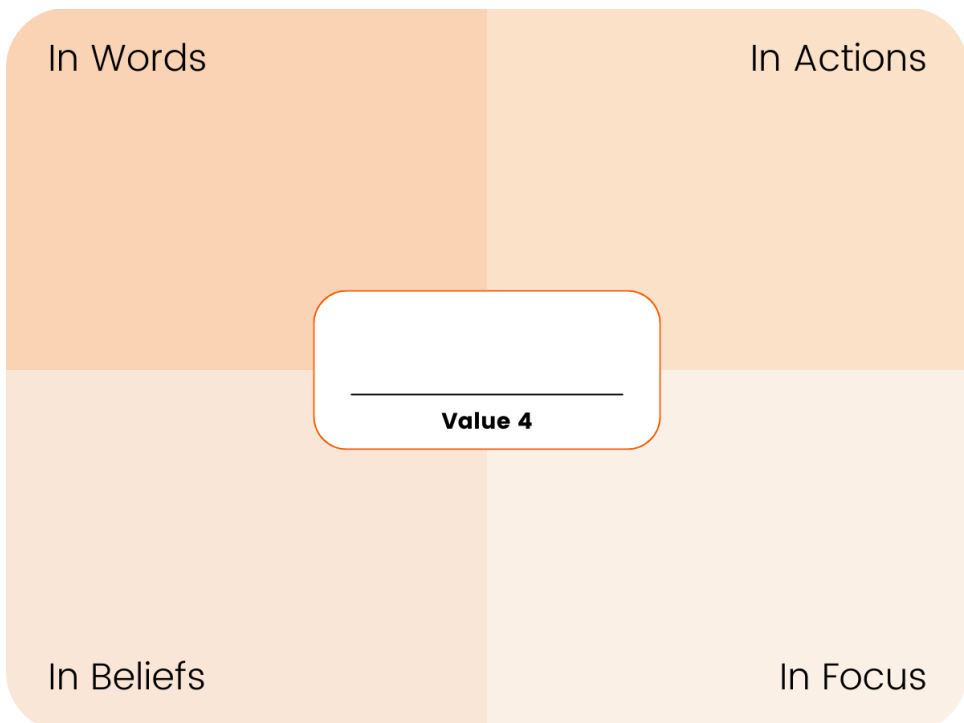
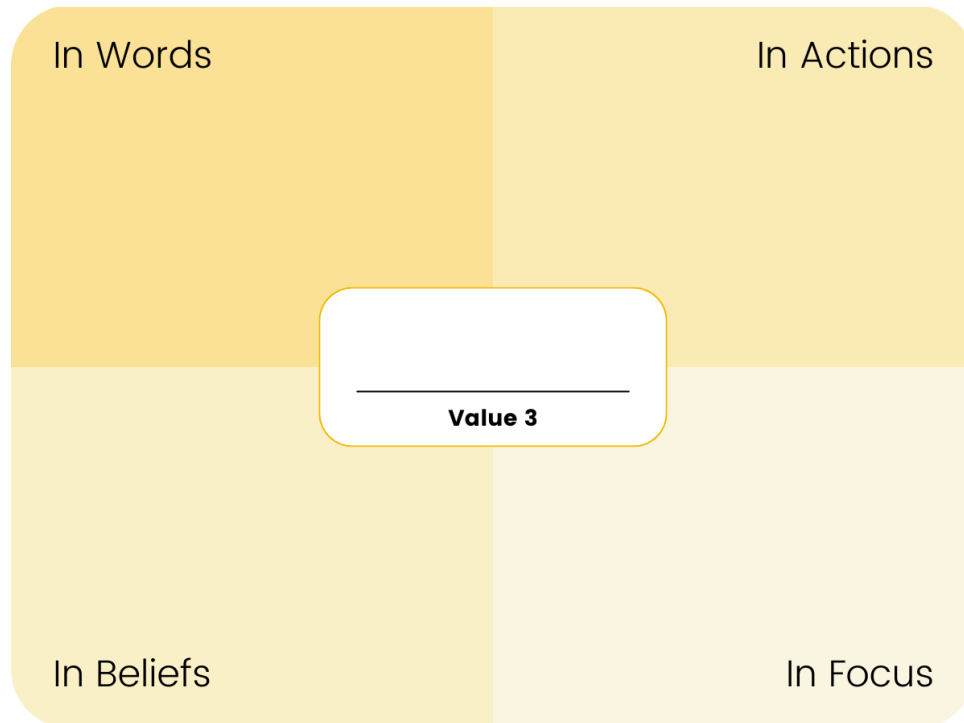
In Words: When you are fully honoring this value, what would your conversations and interactions sound like?

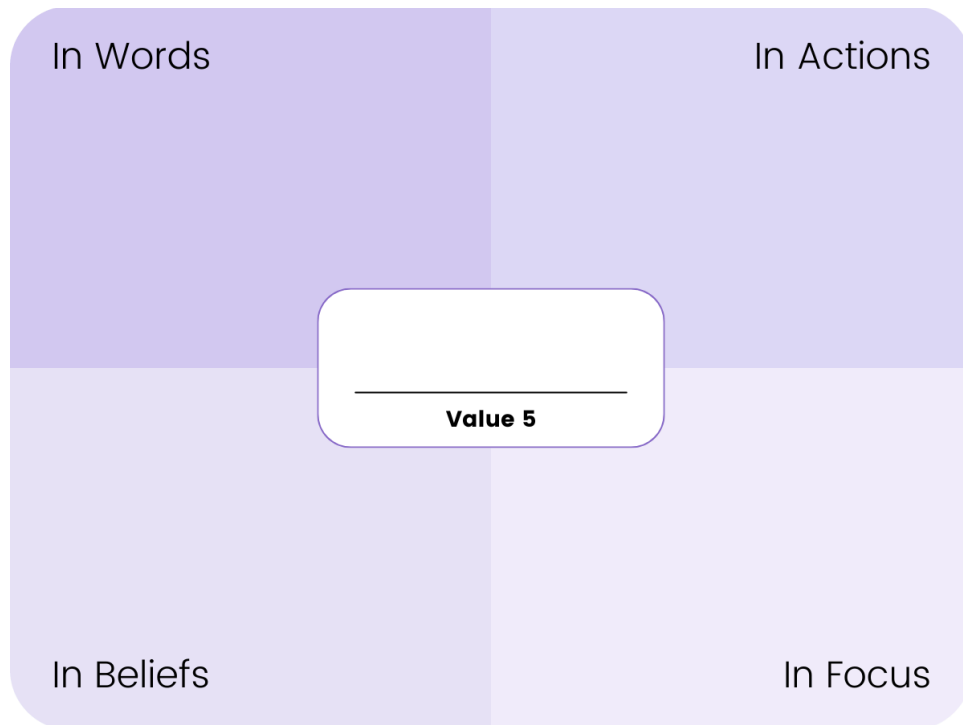
In Actions: When you are fully honoring this value, what would others see that demonstrates this is what you value?

In Beliefs: When you are fully connected to this value what beliefs about yourself, the world, or the people in it would keep it at the forefront of everything you do?

In Focus: When this value is being honored in every situation, what perspective would you see?







PART B: Aligning Your Values with the Transition

In this segment you will have an opportunity to look at your transition in a way that aligns with what you value. Use the tool below to align the process toward making the change and desired outcome with your core values.

My Transition/Goal is:

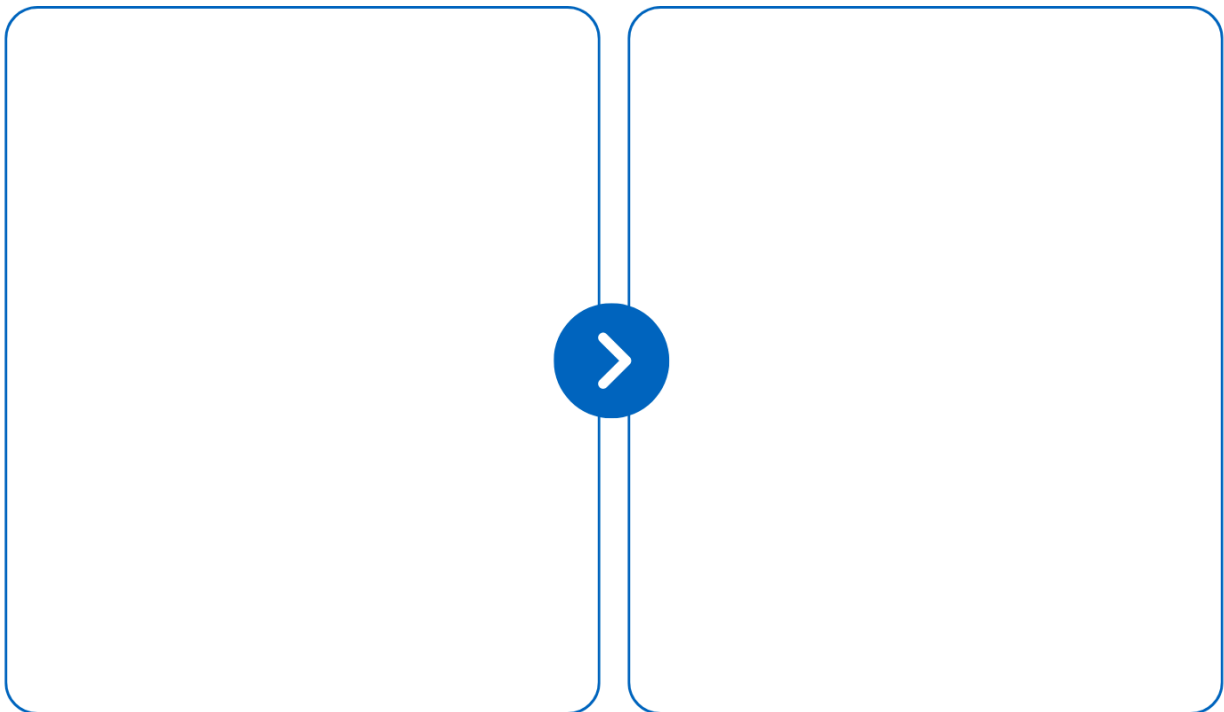
Section 1: While you are working toward this transition, change, or goal, how would you be approaching it in a way that honors each of your core values?

Section 2: Once you have completed your transition, change, or goal, how will you continue forward in a way that honors each of your core values and keeps your energy and momentum high?

Value 1: _____

1: This is how I will honor my value during the transition:

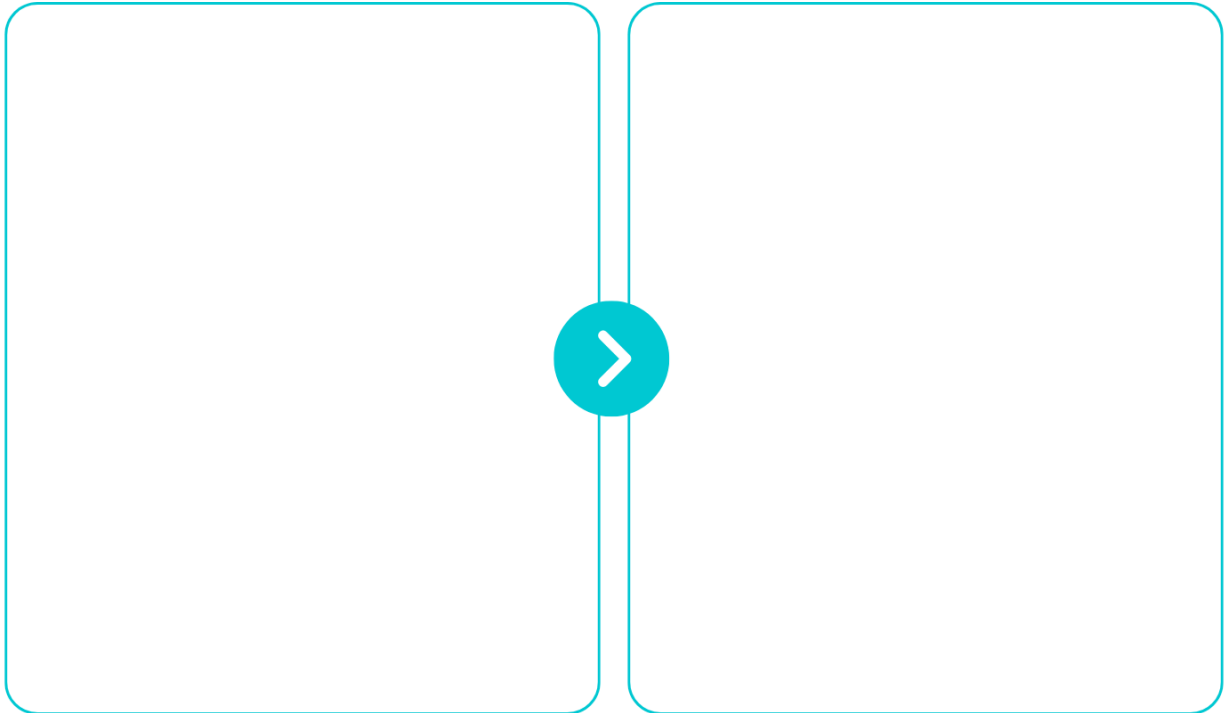
2: This is how I will honor my value after the transition:

The form consists of two large, empty rectangular boxes with rounded corners, outlined in blue. A blue circle with a white arrow pointing to the right is positioned between the two boxes, centered vertically. The boxes are intended for the user to write their responses to the prompts above them.

Value 2: _____

1: This is how I will honor my value
during the transition:

2: This is how I will honor my value
after the transition:



The form consists of two large, empty rounded rectangular boxes with teal borders, intended for writing. They are positioned side-by-side. Between the two boxes, centered vertically, is a teal circle containing a white right-pointing arrow (>).

Value 3: _____

1: This is how I will honor my value
during the transition:

2: This is how I will honor my value
after the transition:

The form consists of two large, empty rectangular boxes with rounded corners and a thin yellow border. These boxes are positioned side-by-side. Between the two boxes, centered vertically, is a yellow circle containing a white right-pointing arrow (>).

Value 4: _____

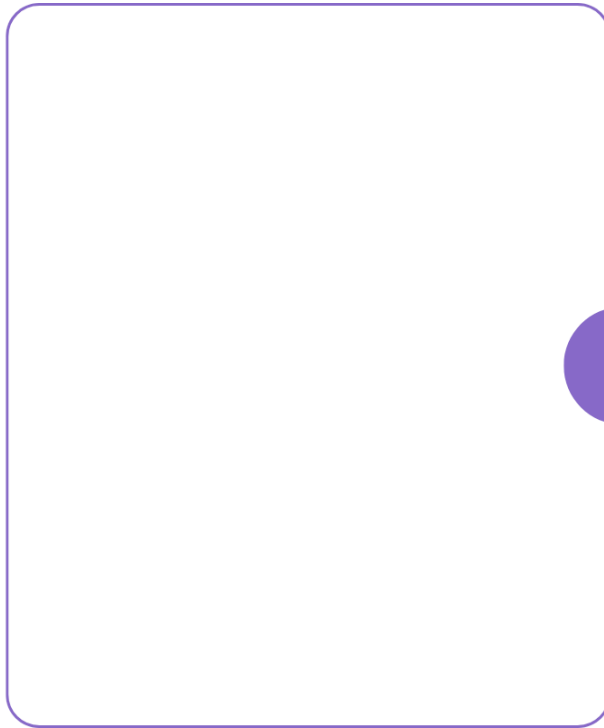
1: This is how I will honor my value
during the transition:

2: This is how I will honor my value
after the transition:

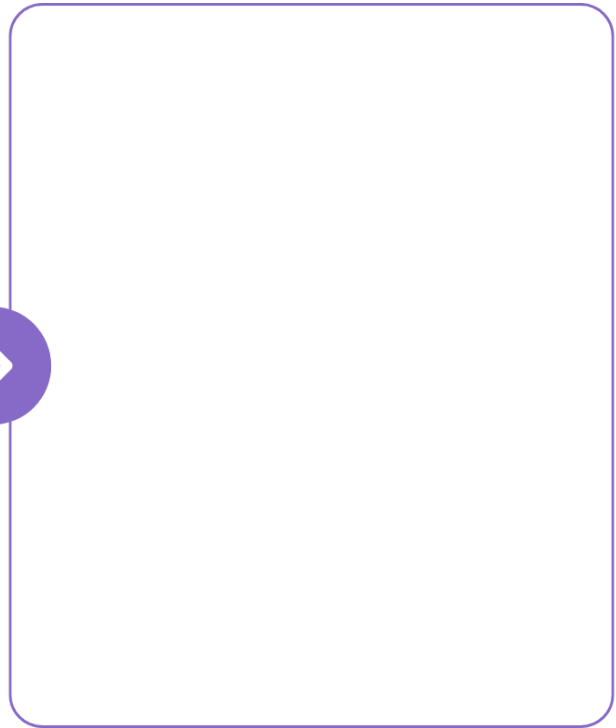
The diagram consists of two large, empty rectangular boxes with rounded corners, outlined in orange. They are positioned side-by-side. A vertical orange line runs between the two boxes. In the center of this line is a solid orange circle containing a white right-pointing chevron (>), symbolizing a transition or flow from the first box to the second.

Value 5: _____

1: This is how I will honor my value
during the transition:



2: This is how I will honor my value
after the transition:



Credit: The concepts inherent in this article are the author's interpretation of materials issued by iPEC®.