

Transition Success: *Aligning Change with Factors of Fulfillment*

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Purpose

The purpose of this tool is to help the clients gain clarity on the desired transition and develop a plan which is in alignment with three factors that can raise their levels of fulfillment.

Benefit

This tool serves two areas of need. First, clients struggle with transition or change due to a lack of clarity and vision of what they want as their proposed transition to be. They often know the desired outcomes in general terms, but are not clear enough to develop action plans and the laser focus to set up the proper trajectory toward the goal. Second, clients will sometimes see a proposed change as the answer to their desires only to find themselves not feeling fulfilled once they achieve it. This tool helps them gain clarity on their goal and how it aligns with three areas of fulfillment.

How to Use This Tool

This tool is best used at the beginning conversations about making a change and can also be used at any point that the coach feels necessary. This step-by-step resource walks clients through three activities that will help them move from concept to sustainable action. Here is a brief view of the process:

Step 1: The clients create a detailed vision for the desired transition or change.

Step 2: The clients explore the alignment of the proposed transition or change with the three Factors of Fulfillment:

- Factor 1: Core Values
- Factor 2: Areas of Wellness and Well-Being
- Factor 3: Life's Purpose and Desired Outcome

Step 3: Based on the vision and alignment information, clients will create an AIM goal and action plan for the desired transition or change.

Transition Success: Aligning Change with Factors of Fulfillment

The secret to a successful transition is a clear understanding of the actual desired outcome and how it is aligned with the factors which provide the client with high levels of satisfaction and fulfillment. This tool provides an opportunity to explore a proposed change and assess its alignment with three core Factors of Fulfillment.

Overview

Step 1 Get Clear

Before using this tool, work with your coach to get clear on what you want as your desired outcome. Having a clear vision of what you want allows you to make powerful connections which lead to the creation of actions that last! We will provide a space for you to write down what you envision.

Step 2 Get Connected

The key to sustainable change is the ability to connect the desired outcome to that which brings the highest levels of personal and professional fulfillment. When you are able to find the alignment sweet spot, taking actions toward the change becomes as exciting as accomplishing the goal.

- Factor 1: Core Values
- Factor 2: Areas of Wellness and Well-Being
- Factor 3: Life Purpose and Desired Outcome

Step 2: Get Connected

The key to sustainable change is the ability to connect the desired outcome with things that bring the highest levels of personal and professional fulfillment. When you are able to find the alignment sweet spot, taking actions toward the change are just as exciting as accomplishing it.

Fulfillment Factor 1: Core Values

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. Look at the list below and circle your top five values.

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

Core Values Reflection Activity: Write the five core values you circled below and think about what these really mean for you.

Core Value 1: _____

What does this core value mean to you? _____

How does the proposed change or transition align with or honor this value? _____

Core Value 2: _____

What does this core value mean to you? _____

How does the proposed change or transition align with or honor this value? _____

Core Value 3: _____

What does this core value mean to you? _____

How does the proposed change or transition align with or honor this value? _____

Core Value 4: _____

What does this core value mean to you? _____

How does the proposed change or transition align with or honor this value? _____

Core Value 5: _____

What does this core value mean to you? _____

How does the proposed change or transition align with or honor this value? _____

How would you describe what the proposed change or transition means to you? How does this impact your levels of satisfaction and fulfillment?

Fulfillment Factor 2: Areas of Influence/Well-Being

According to the Institute for Wellness Education (www.instituteforwellness.com), “Wellness is a state of well-being and process that applies to the “whole person.” Human beings aren’t one-dimensional—our lives comprise many facets.” As you consider a transition or change, it is important to understand how it supports or impacts any of the areas of wellness and wellbeing.

ACTIVITY: As you think about the proposed change or transition, how does it relate to each of the following areas of wellness and well-being?

Physical Wellness: *Physical wellness encompasses a variety of healthy behaviors including adequate exercise, proper nutrition, and abstaining from harmful habits.*

Examples: Physical vitality, active lifestyle practices, structured exercise

Emotional Wellness: *Emotional wellness is typically defined as possessing the ability to feel and express human emotions such as happiness, sadness and anger. It means having the ability to love and be loved and achieving a sense of fulfillment in life. Emotional wellness encompasses optimism, self esteem, self-acceptance, and the ability to share feelings.*

Examples: Coping skills, stress management, emotional regulation, emotional awareness

Social Wellness: *Social wellness refers to our ability to interact successfully in our global community and to live up to the expectations and demands of our personal roles. This means learning good communication skills, developing intimacy with others, and creating a support network of friends and family members.*

Social wellness includes showing respect for others and yourself. Contributing to your community and to the world builds a sense of belonging.

Examples: Family and social support and cohesion

Spiritual Wellness: *Spiritual wellness involves possessing a set of guiding beliefs, principles, or values that help give direction to one's life. It encompasses a high level of faith, hope, and commitment to your individual beliefs that provide a sense of meaning and purpose. It is the willingness to seek meaning and purpose in human existence, to question everything, and to appreciate the things which cannot be readily explained or understood.*

A person who is well spiritually seeks harmony between what lies within as well as the forces outside . . .

Examples: Core values, identity, and purpose

Environmental Wellness: *Environmental wellness is an awareness of the unstable state of the earth and the effects of your daily habits on the physical environment. It consists of maintaining a way of life that maximizes harmony with the earth and minimizes harm to the environment. It includes being involved in socially responsible activities to protect the environment.*

Examples: Core values, identity, and purpose

Occupational Wellness: *Occupational/Vocational wellness involves preparing and making use of your gifts, skills, and talents in order to gain purpose, happiness, and enrichment in your life. The development of occupational satisfaction and wellness is related to your attitude about your work. Achieving optimal occupational wellness allows you to maintain a positive attitude and experience satisfaction/pleasure in your employment. Occupational wellness means successfully integrating a commitment to your occupation into a total lifestyle that is satisfying and rewarding.*

Examples: Activities in which we engage, interests, skills, performance, satisfaction

Fulfillment Factor 3: Life Purpose and Desired Outcome

The final key factor to fulfillment is the connection of the desired change to transition to one's sense of purpose. When the things we do are in alignment with who we are, what we believe in, and our divine purpose, there is a higher level of passion and engaged energy. Take a few minutes to reflect on the following questions:

1. What are your greatest gifts, talents, and strengths?

2. What purpose do you believe is behind these gifts, talents, and strengths? In other words, what is your life's mission and purpose?

3. In what ways does the proposed change and/or transition align with your life's purpose?

4. In what ways, if at all, might there be a disconnect between the proposed change and/or transition and your life's purpose?

5. When you achieve this change and/or transition, how will your life and the lives of others be richer?

Step 3: Get Going

Now that you have a desired outcome that is aligned with the three core Factors of Success, it's time to put the rubber to the road. In this segment, you will have an opportunity to work with your coach to create an AIM plan that will outline your goal with measurable actions. Let's set you up for success!

Desired Outcome/Transition: _____

Current Status (Baseline):		
A cceptable Minimum Goal	I deal Goal	M iddle Goal (Reasonable Stretch)

Based on where you are TODAY, choose one of the AIM goals that you would like to work on. Don't worry... we will keep working toward the Ideal. Start where you are and work from there!

Now that you are clear on the actual goal, let's break it into smaller parts.

1. Look at the goal you selected in AIM.
2. Choose up to three areas of focus for your action plan.
3. In the first row, write out the areas of focus. You may either describe what each one means or create a SMART Goal.
4. In the second row, write the actions you will take to achieve each sub-goal.
5. In the last row, list any resources you might need to achieve each sub-goal.

AIM Component 1 (Sub-Goal)	AIM Component 2 (Sub-Goal)	AIM Component 3 (Sub-Goal)
Description or SMART Sub-Goal 1	Description or SMART Sub-Goal 2	Description or SMART Sub-Goal 3
Action Steps/Dates Due	Action Steps/Dates Due	Action Steps/Dates Due
Resources Needed	Resources Needed	Resources Needed

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