



## **Coaching Transitions: Successful Navigation of Life Changes**

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### **Seminar 1: The Dynamics of Change and Transition**

*All changes, even the most longed for, have their melancholy. For what we leave behind us is part of ourselves. We must die to one life before we enter another.*

Anatole France

#### **I. The Dynamics of Change**

- The Dynamic Flow
  - Change Will Create Excitement
  - Next, Trepidation and Anxiety
  - Expansion into a New Experience
  - Mastery
- Two Additional Aspects of Change That May Seem Paradoxical
  - Every step forward means relinquishing a past position
  - The more subtle aspect in learning something new and creating change is an injury to self-esteem.
- Six Components in the Dynamic of Change
  - The Myth: That there is a perfect choice

- The Illusion: That the perfect choice will solve all problems
- Disappointment: That nothing is perfect.
- Developmentally: No one is going to take care of you
- Growth: Next best action
- Consolidation: The happy/sad result
- Four of the Most Common Styles of Letting Go.
  - Abrupt
  - Slow/Gradual
  - External Focus
  - Active or Passive
- Some Principles of Letting Go.
  1. Accept the reality as well as the importance of the meaning of the loss.
  2. Acknowledge the loss openly.
  3. Accept and expect over reaction.
  4. Expect and accept the process of grief.
  5. Compensate for the losses.
  6. Define what's over and what isn't over.
  7. Mark the endings.
  8. Treat the past with respect.
  9. Take a piece of the old story with you.
  10. Endings ensure the continuity of what really matters.

## **II. The Dynamics of Transition: 3 Phases**

## **1. The Ending**

- 5 Components of the Ending Process
  - Disengagement
  - Dismantling
  - Dis-identification
  - Disenchantment
  - Disorientation

## **2. The Neutral Zone**

- People in transition will create new ways to return to the old story
- Foster attitudes that promote curiosity, openness, and new learning
- Two question to focus on the meaning of transition:
  - What it is time to let go of in my life right now?
  - What is waiting to make its entrance into my life?

### Creative Use of the Neutral Zone

1. Embrace setbacks, losses, and disadvantages as entry points into new solution.
2. Establish a time and place to be alone to reflect.
3. Provide opportunities for others to step back and review as well.
4. Accept your need for this time in the neutral zone.
5. Engage in training and techniques of discovery and innovation.
6. Engage in experimentation.
7. Keep a log of neutral zone experiences.

8. Take this pause in the action of your life to write an autobiography.
9. Think of what would be unlived in your life if it ended today.
10. Reflect consciously on the present transition experience in your own life.

### **3. Finish With a New Beginning**

- A new beginning follows the ending. And the new beginning involves changing how you see yourself—even aspects of your identity.
- Never underestimate the change back of pressure from the system.
- Every transition is *from* something *into* something.

Some considerations to reinforce the new beginning:

- Be consistent
- Shrink the change to ensure specific successes
- Evolve a new identity
- Celebrate small successes

## Seminar 2. How to Change Mind, Brain and Behavior

*Nothing so needs reforming as other people's habits.*

Mark Twain, *Puddn'-Head Wilson*

**Why do we resist change?** Even changing a story that doesn't work?

- Part of the answer is in our minds.
- Part of the answer is in our brains.

**States of Mind:** A mind-body state, like a specific hardware program that determines how we perceive and process information and how we respond. A psychophysiological set of emotions, memories, mental models, and behavioral patterns.

- Understand States of Mind
- Access to Mind States
- A Mentoring Application
- How to Regulate States of Mind
  - Mantras and Self-Regulation
  - Neuroassociative Conditioning
- There are two forces behind all behavior:
  - The need to avoid pain
  - The desire to gain pleasure

Ask better questions

- Refocus from avoiding pain to generating a greater good
- State always comes first, then strategy and story.

## **How do you condition yourself to make changes that last?**

- Identify what to change
- Interrupt a pattern
- Create a new association that empowers you

## **Mindset Mapping for Growth**

### **Fixed vs. Growth Mindsets**

### **The Impact of Belief and Mindset**

#### **To help clients change behavior, minds, and brains:**

- Begin where the client is
- Help them learn more about what they already know
- Highlight positive attributes--existing neuronal networks
- Don't focus on mistakes
- Correct mistaken couplings
- Let sleeping dogs and old, unuseful lay
- The brain has an intrinsic desire to create novel selections
- The client must recognize and take ownership of experiences
- When we write a new story--and change our minds--we change our brains.

- Give attention to a new experience or a new way of doing things consistently and repetitively
- Encourage clients to develop their own metaphors and connections

### **Principles of Mentoring Successful Change: A Summary**

- Concentrate on new behaviors rather than problems to create new brain pathways
- Co-create new ways of thinking to stimulate brain circuits, with an “eye on the prize” to lay new mental maps
- Regulate your state of mind and manage emotions to promote brainpower. New insights and adaptations occur through balanced learning: left brain and right brain, intellectual and emotional.
- Facilitate insight rather than give advice. People can usually discriminate between inquiries that prompt insight and attempts at persuasion.
- Focus on successes rather than obstacles or nonperformance. The power is in the focus.
- Emphasize positive adaptive behavior and progress; discourage attention to negative behavior.
- Facilitate new behaviors and guide the development and actualization of new mental maps.
- Collaboratively conceptualize the mental map—the internal model—of the client in order to facilitate a new level of mastery.

- In the event of diversion to old feeling or behavior, redirect ideas and energy flow to the new ideas.
- Remember that the power is in the focus, and that permanent change arises from the consistency of that focus.
- Knowledge conveyed passively is inert; knowledge generated through insight changes the brain and mind.
- Conceptualize the meta-map with the client in order to master and internalize the process. This helps create the outline to incorporate the new experiences as a storyline and part of an evolving identity.



### **Seminar 3: ROADMAP ® A New Story**

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

Niccolo Machiavelli, *The Prince*

#### **ROADMAP ® For a New Story**

- **Recognize** authorship of your life and transition story
- **Own** your present story
- **Assess** the story lines and plot
- **Decide** what to keep, enhance, let go, and avoid
- **Map** changes.
- **Author** new experiences.
- **Program** new identity to incorporate and sustain the changes.

#### **Illustration of ROADMAP ® of a career story.**

- **Recognize** your career story.
- **Own** your career story, especially needs and ideals.
- **Assess** your career story.
- **Decide** on a plan, and how to make it.
- **Map** a new story. Where, when, how to begin. SMART goals, initiatives, next best action.
- **Author** changes. Implement the plan.
- **Program** new experiences and incorporate them into your identity.

## Successful and Productive Work

- Time is not an adequate measure of hard work.
- Hard work is not an adequate measure of performance or success.
- A work ethic is not the same as a productivity/success ethic.
- If possible, delegate everything other than what you do uniquely well.
- Time management is energy management.
- Stress regulation is energy management.
- Follow your passion.
- Know your optimum state of mind to accomplish a specific task.
- Know how to enter your optimum state of mind—how to get to your zone.
- When your passion and your expertise combine, deciding possibilities occur.
- Structure gives you freedom.
- If you're thinking of retiring, consider retirement as a new career. What is its mission and purpose? The business plan? The difference your wisdom will make in this career? Finally, consider this possibility: Success is when you reach a point in your life that you can celebrate the freedom *to* work rather than freedom *from* work.

## Operating Systems

- Surface story
- Shadow Story
- Ongoing assessment
  - Monitor your choices

- Question your ideas
- Probe your reasoning
- Ask clearly and honestly: Does it work?

### Mentor Coaching Applications

- Challenge your mindset
- Approach work with new perspectives
- Think long term
- Get feedback from other sources
- Do these approaches consistently

### **Destination Postcard**

- Script the critical moves pointed to the destination
- Make the changes consistent with identity
- Focus on the next step
- Build habits to optimize efficiency
- Visualize the entire experience of successful arrival

### **Most Frequent Mistakes in Writing a New Story**

1. Not knowing that you don't know.
2. Stopping at the first right answer.
3. Procrastination.
4. Inefficient energy management.

5. Ambiguity.
6. Too many choices.
7. Lack of persistence.
8. Not following success trails.

### **Engineering Effectiveness**

1. Focus specifically on the next step.
2. Specify the next step.
3. Make changes tangible and concrete.
4. Make progress measurable.

### **The AAA Principles of Change to Author a New Transition Story: Awareness.**

#### **Acceptance. Action.**

1. Is it working?
2. It takes just as much energy to create any belief in your story.
3. Decide what you want.
4. Do you have specific, measurable goals?
5. Small changes lead to big changes.
6. Be consistent in the pursuit of your goals.
7. The benefit of doing more of what is working and less of what isn't working will become evident and self-perpetuating.
8. Ask for feedback.
9. Get success insurance.

10. Take a chance.

11. It's never too late to start.

12. Everything is okay in the end. If it's not okay, it's not the end.

## **Seminar 4: Specific Challenges and Opportunities in Transitions**

*Arrange whatever pieces come your way.*

Virginia Wolfe

### **Special challenges in dealing with situations and emotions of transition**

- Significant, abrupt loss
  - Job
  - Significant Relationship
  - Disability
  - Divorce
  - Professional athletes
- Practicing Professionals (Healthcare, Financial, Legal) who have done one career all their lives
- Extraordinary demands, stimulating success, and retirement
  - Professional athletes
  - Professional actors
  - CEO's
  - Business owners

### **What do clients want from us?**

- Unselfconscious participation
- Attunement to clients' needs.

- Full immersion
- Vision of the clients' evolution
- Illuminate the unseen
- To see hope however it is camouflaged

### **How to facilitate change in coaching: 12 caveats**

1. Each person's life story is created.
2. Understanding begins with examinations of which story lines work and which do not.
3. Knowing what not to do is at least as important as knowing what to do.
4. Distinguish what to change, accept, let go, and enhance.
5. When people create their own answers, they have signed on to invest in the outcome.
6. Someone has to change an internal model of assumptions to sustain the new story.
7. We don't see things as they are; we see things as we are.
8. Change is constant and inevitable; it is the resistance to change that generates most problems.
9. Small changes lead to big changes.
10. Solutions, causes, and problems are not always related or even inter-connected.
11. A collaboration keeps both individuals on the same side, looking at the same scene together.
12. The benefit of doing more of what is working and less of what is not will become evident and self-perpetuating.

## **Your Wellness Story**

- Wellness is a mindset
- Wellness integrates mind, body, and spirit with a balanced flow of energy
- Wellness is an ongoing process of choices
- Decay vs. growth
- An enriched environment of intellectual and emotional stimulation creates more complex brain structure
- Chronic stress impairs neurogenesis
- Future self identification

## **The Life Stages of Success**



## WORK PAGES AND EXERCISES

### THE TRANSITION STORY

A good story is essential for making a successful transition.

We need to use the power of storytelling to pursue our purpose. A story can clarify and solidify a purpose. The antithesis of a story is “just the facts.”

Any good story that involves the elements of transformation and discontinuity requires inevitable questions about who you are and whether you are going to be effective.

A good story must be coherent.

You have to engage the discontinuity, to get inside it and dance with the questions, the uncertainty, the unknown. The story must deal explicitly with magnitude of change.

#### Emphasize Continuity

- Keep your reasons for change grounded in your character, in who you are. Who you are includes your professional and personal identity, your sweet spot, what you are good at, what you are not. Your unique abilities.
- Be clear about what you want personally and professionally. This includes the reasons compelling you to change.
- Point out any explanations that extend back in time, such as a goal that you could not pursue originally, but can now.
- Reframe your past in light of the change you’re seeking to make. We continually rethink and retell our life and professional stories. Find the key elements that will carry forward and what you relate to your current goals and what you will do or even think about doing going forward.
- Choose a story form that lends itself to your tale of reinvention. My good friend Art’s story was that as a senior executive at a multinational company he found himself exceptionally good at facilitating managers and executives to find a common purpose and to unite to achieve more than they had ever imagined. This is exactly what he based his new consulting business on.

The transition story provides the coherence that will reassure in the present and foreshadow the future. The person you were yesterday is the person you are today and the person you will be tomorrow, only moreso.

As you embark on a career transition, you may find yourself torn among different paths, interests, and priorities. The story is yours to write. Whatever you think, feel, and experience is what you create each moment.

## YOUR RESUME STORY

Does your resume tell a story? The process of putting together a resume is as valuable as the end product, because it involves drafting your own story. Everything in the resume must point to one goal, the climax of the story you're telling.

Build it in three parts:

- Describe the position you want.
- Create a bulleted list of experience highlights that clearly demonstrate your ability to do that job. Consider all the experiences you have had—including volunteer work and anything else that might apply—and identify which parts support the story you're telling.
- Summarize your professional work. Include all of the relevant positions you've held, including the responsibilities as well as accomplishments.

Your resume will tell a coherent, cohesive story of purpose and passion. The work you have done, the skills and interests you have developed, will point toward a resolution toward your stated goal.

## **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

ADVENTURE

BEAUTY

CATALYZE

CHARITY  
CONNECTEDNESS  
CONTRIBUTE  
CREATIVITY  
DIGNITY  
DISCOVERY  
FAMILY  
FEEL  
FREEDOM  
GENEROSITY  
GROWTH  
HAPPINESS  
HEALTH  
HONESTY  
INDEPENDENCE  
INDIVIDUALITY  
INFLUENCE  
INTIMACY  
JUSTICE  
KINDNESS  
KNOWLEDGE  
LEADERSHIP

LEARNING

MASTERY

PEACE

PLEASURE

POWER

SELF-ESTEEM

SENSITIVITY

SPIRITUALITY

SUCCESS

TEACHING

TRUTH

WINNING

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

Do anything and everything to protect them. If you feel you have not been entirely true to your ideals or protected them with 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**

A need is an essential requirement, a necessity for mind, body, or spirit. An unmet need is the gap between an internal realistic standard and reality. Earlier in life, needs comprised physical nurturing, empathic attunement, attachment, effectiveness, exploration, assertion, feeling and tension regulation, and sensory needs. In adulthood, needs are adult versions of those same basic needs, all providing for physical requirements, comfort, identity, affirmation, love, communication, safety, mastery, freedom, and sexual/sensual needs. When you consistently meet your own needs, a sense of effectiveness and optimum functioning results. Remember the satisfaction of having completed something knowing you have given it everything you have?

Unmet, frustrated needs create discomfort. For example, the basic need for connection (one that is a commitment at a heart level, not just a decision), when derailed or nonexistent, produces emotional disharmony. A need may be most obvious when it is not met.

Wants (wishes and desires) are replaceable with other wishes, and fantasies are interchangeable, but one need cannot substitute for another need. Old unmet needs manifest as present wants, as an unmet childhood need for affirmation manifests as a 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, each with its own particular history.

You can get sick if you don't have enough of a need met. You can get sick if you have too much of a want. Unsatisfied wants may result from not having a defined goal (not having an end point of "good enough"), or trying to satisfy a past want in present time. You can never get enough of what you don't need.

## **NEEDS CLARIFICATION LIST**

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

ACCEPTANCE

ACCOMPLISHMENT

ACKNOWLEDGEMENT

ACTUALIZATION

CARE

CERTAINTY

COMFORT

COMMUNICATION

CONTROL

DUTY

EFFECTIVENESS

EMPATHY

HARMONY

NURTURANCE

ORDER

PHYSICAL ACTIVITY

RECOGNITION

SAFETY

SECURITY

SIMPLICITY

STRENGTH

TIME ALONE

OTHER



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

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

### **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

If a specific goal aligns with ideals and needs, move to commitment.

Once committed, be loyal to yourself by fulfilling your commitment as validation of your worth.

Consider needs and ideals in decision-making.

Each decision you make can be sounded against the considerations of needs, ideals, and wants. If the choice meets all three, it is a “yes.” If it aligns with need and ideal integrity, this initial alignment must then consider external variables such as timing and priority. If it opposes or does not meet a need or ideal, then the decision can be “no” or “on hold.” A conflict of needs, ideals, and wants leads to compromise of diminished happiness and performance.

Obstacles manifest when beliefs and perceptions based on past experiences ghostwrite a narrative and eclipse a need or ideal. For example, someone who expects abandonment and sets up situations to test another’s loyalty ultimately perceives (or creates) rejection from the continued tests. Another kind of obstacle presents when goals do not align with ideals and needs.

Frustrated needs create symptoms, while disowned ideals create emotional problems. Meeting a need requires external change. Honoring an ideal begins with internal change.

Discern and focus on any disparity between stated ideals and expressed ideals. Do you buy a certain car to say, “I’m important,” a certain home to say, “I’m worthy,” or a designer suit or dress to say, “I have taste and style?” Are these behaviors driven by ideals or by desires?

A discrepancy can exist for organizational systems as well as for individuals. For example, corporate ideals 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 core ideals of a corporation parallel the core values of an individual, both grow.

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

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

Clarify essential ideals so that life and work both naturally evolve from these values. Ideals may shift or evolve as you progress in your life, but they will not stray too far from your home base and core values. For example, making major life changes when something isn't working in your life is a common attempt to remedy what seems to be missing, not working, or compromised. Change for the sake of change, in order to convert doubt or uncertainty into action may obfuscate basic values. Aligning life choices with fundamental values and needs also fulfills a spiritual essence.

Contentment and success begin with centering a life story on personal ideals. Having and living up to these ideals generates self esteem.

## 4 BASIC INQUIRIES FOR STORYLINE EVALUATION

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

If there is a problem, barrier, or obstacle, it is not a simple matter of getting over it, countering, or adapting to it: It is not there until you create it. Consider creating something else instead. For example, convert a fear of public speaking into an intention with a specific commitment.

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

The bottom line, no matter how entrenched the process or how strong the hope, is “Does it work?” Emotionally, it is not so easy to let go of a hope without it being fulfilled—such as trying to get someone to respond in just the right way?

### *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.

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

Your life is the manifestation of your beliefs.

Choose carefully what you engage.

## 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.

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.