



Australian Government
Department of the Environment and Energy

Learning Journal

Leading with Influence Program



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Introduction

This Learning Journal guides you through the reflection and note-taking before, during and after the program. This includes after each workshop day as well as your Manager and Learning Trio meetings. It includes a checklist of the recommended Program activities for each workshop day, guidelines for the meetings and starter or prompt questions for reflective journaling.



Reflective Journaling

We suggest you use the questions in this document to journal your progress through the program. We have provided a notebook for all your reflections, thinking and planning. Reflection is the intentional attempt to synthesize, abstract, and articulate the key lessons taught by experience, typically captured in a reflective journal. Journaling is a personal and private process and one way to access deeper levels of Self reflection and knowledge. Philosopher and psychologist John Dewey wrote:

*"We do not learn from experience ... we learn from **reflecting** on experience."*

Key Benefits

- Capturing and processing your thoughts, feelings and actions leads you to a deeper understanding of yourself and your work
- Dedicating time to systematically reflect on your life and work regularly (e.g. with a daily check-in) really does affect your learning and performance
- Reflecting on what has been learned makes experience more productive
- Helps to link understanding and workshop practice
- Enables development of practice and goals
- Builds confidence in the ability to achieve a goal (i.e., self-efficacy);
- which in turn translates into higher rates of learning

Guidelines

- Timely - Capture experiences/events as soon as possible
 - Go with the flow – entries are uncensored accounts of learning experiences. Style and grammar are *not* the main concerns – just start writing and see what happens
 - Explore – as well as describing, explore and explain what happened
 - Be honest –admit mistakes and acknowledge successes
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- Be selective –write about key events or ideas only
- Look to the future – reflect on what happened and how it will impact on future ideas or activities

Some guiding questions

- What did I observe during that event or experience?
- What were my thoughts during that experience? And why did I think that way?
- What were my feelings during that experience? And why did I feel that way?
- What were my wants during that experience? And why did I want that?
- What was my role in the event? And why did I adopt that particular role?
- What might this experience mean in the context of my work?
- What other perspectives, could be applied to interpret the situation?
- How can I learn from this experience?
- What did I do well?
- What could I have done differently/better?
- How could this experience contribute to me being the leader I aspire to be?

Ref: Harvard Business School Article: 'Learning By Thinking: How Reflection Improves Performance' by Giada Di Stefano, Francesca Gino, Gary Pisano, and Bradley Staats (April 2014)

Program Conversations

Between the Introductory Workshop and Workshop Day 1

With your manager...

Your manager plays a key role in supporting your learning in this program. Meetings with your manager are programmed before, during and after the Leading with Influence Program.

The main focus of your pre-program conversation will be to explore your Improvement Goal.

Note: you are **not** asking for your manager's approval here - it is vital that you work on an Improvement Goal that is *important to you*. It is also true that since a person's Improvement Goal is related to their hidden (unconscious) assumptions sometimes others can see things about ourselves that we cannot.

Questions you might ask are listed below.

With potential supporters - colleagues, direct reports, others ...

As mentioned above, an important component of this program is to recruit the support of others in developing your Improvement Goal. In addition to your manager these people could be colleagues, direct reports, your manager's manager or anyone else that satisfies the criteria listed in the following guidelines.

Guidelines for choosing your Improvement Goal Supporters

1. Ideally you should have at least 3 people supporting you. You will be able to enter up to 10 people.
2. One of your supporters should be your manager if at all possible (and optionally your Manager's Manager too if that is relevant).
3. Your supporters should be people who interact with you regularly in a context in which your Improvement Goal can "show up".
4. Your supporters need to be prepared to give you supportive feedback on an ad-hoc basis. This is facilitated by a secure online web page that can be used as often as required. The feedback or observations made will **not be anonymous** so you will have the opportunity for further discussion and exploration about anything anyone says.

Suggested questions to ask potential supporters

Some questions you might like to explore with your potential supporters are:

1. "During the program I am thinking I will work on the Improvement Goal of *{your Improvement Goal goes here}* and I would like to get your reflections on that. What do you think when you hear me say that?"
2. "If you were to suggest an Improvement Goal to enhance my leadership capability, or even just one thing I could get better at, what would it be? Why do you suggest that?"
3. "If I were to achieve that change, what *specifically* would I be doing or saying that would indicate to you that I had made that change?"
4. "Part of the program is an online tool that will enable you to give me ad-hoc feedback or observations related to my Improvement Goal. Are you happy to be one of my nominated supporters?" (see: point 4 in the next section).

Refer also to the processes and ideas explored during the Introductory Workshop: Appreciative Interviews, Obstacles and how to overcome them, etc.

Improvement Goal Development Process with your Supporters

1. Before the Introductory Workshop please think about what you think would be a suitable Improvement Goal for yourself (using the guidelines in the Introduction to Overcoming Immunity to Change™ document). You should have completed that by the time you are reading this. :-)
2. At the Introductory Workshop you will be working on developing your Improvement Goal.
3. After the Introductory Workshop you will have time to have the conversations with potential supporters as per the guidelines above.
4. On Day 2 you will be working on Columns 1 to 4 of your Immunity Map as well as helping you develop some practices to challenge your old assumptions and to develop new, more effective habits. For this day there will be two accredited Overcoming Immunity To Change™ coaches present. Murray Hopkins (your facilitator) will be joined by Anne Sautelle.

For additional support you will be encouraged to join with 2 other participants to create Learning Trios. You will be doing some specific processes with your Learning Trio before, during and after Days 3 & 4 of the program.

5. A few days after Day 2 you will receive an email invitation to an online survey page where you can enter your Improvement Goal. There is also provision to enter the names and email addresses of between 3 and 10 nominated supporters.
6. Once you complete that initial survey you will receive an email containing a link where you can quickly log your own feedback or observations of your Improvement Goal development as they arise. There is no limit to the number of responses you make. The people you nominated as Supporters will also receive a similar link that will enable them to do likewise so your "support community" can alert you whenever they observe your new behaviours in action.
7. On Days 3 & 4 of the program there will be a little time "workshopping" your Improvement Goal with your Learning Trio as well as being involved in a short general whole group discussion about the process so far. NOTE: In the group discussion you will *not* be asked to share any of your personal development if you do not wish to do so. We will be stepping back to observe the process so far.
8. Three months after the Day 4 you will receive an email invitation inviting you to record your thoughts about your progress with your Improvement Goal. The people you nominated as Supporters will also be asked for their reflections on your progress.
9. We will send a similar email at 6 months and 12 months.
10. At any stage you will be able to get a report of all the responses and feedback made by and for you.
11. As part of the program evaluation, after the 3, 6 and 12 month survey we will create a summary report of the quantitative data which we will send to the Department. This will *not* contain your Improvement Goal nor any of the feedback comments nor any personally identifiable data. The purpose is simply to ascertain the extent to which the participants in your group identified improvement in their Improvement Goals over that period.

During and after the program

With your manager

In subsequent meetings the aim is to share and discuss:

- your Learning Journal (observations and insights)
- opportunities to develop and apply your learning at work
- successes and challenges applying or developing your learning

The format of these meetings is up to you and your manager, however it is important to cover the objectives outlined above.



With your Learning Trio

Learning Partners play a significant role supporting each other to process and embed learning. They are:

- A safe and confidential sounding-board
 - An equal and reciprocal relationship
 - Committed to helping each other maintain momentum towards their learning goals
 - Someone to share valuable learning with and provide advice from their own experience
 - Responsible for supporting each other to maintain a growth mindset during the learning journey and to assist with exploring any insights from the workshop sessions
 - Licensed to challenge their partners, in the spirit of helping them develop and succeed.
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In your Learning Trios you will spend time during the workshop days reflecting on your learning as well as sharing your experiences and learning journey. Following the program your Learning Trio is encouraged to meet to share:



- your Learning Journal
- the application of your learning back at work
- successes and challenges applying or developing your learning
- ah-ha moments and plans to deepen and apply your learning.

The format of these meetings is up to you and your Learning Trio, provided you cover the above objectives. In your first meeting, we suggest you spend a small amount of time discussing your expectations of each other.

Pre-Introductory Workshop

Checklist

<input type="checkbox"/>	Download	the Program Overview and Introduction to Immunity to Change™ PDF documents. Please read them both carefully.
<input type="checkbox"/>	Watch	the Lisa Lahey video. The link is in the Introduction to Immunity to Change™ document.
<input type="checkbox"/>	Reflect	on what your Improvement Goal might be for this program. Write a draft Improvement Goal to bring to the Introductory Workshop.

Introductory Workshop

During the Introductory Workshop you will be working with your draft Improvement Goal.

You will also be working on approaches to get the support and feedback you might want in order to help refine your Improvement Goal.

Before Workshop Day 1

Checklist

<input type="checkbox"/>	Discuss	<p>your draft Improvement Goal with your manager and your supporters. See the Program Conversations section above for guidelines and suggestions.</p> <p>See also the Column 1 guidelines in the Immunity to Change™ Process Steps section on page 13. This will help you refine your Improvement Goal in the light of the feedback you have been getting from your supporters.</p>
<input type="checkbox"/>	Watch	<p>Please watch and/or listen to the appropriate items in the Before workshop 1 section on the online resources web page here:</p> <p>http://www.curiosityskilledthecat.com/index.php/docelwiresources</p> <p>You will need to allow about 90 minutes in total for the videos and audio</p>
<input type="checkbox"/>	Reflect	<p>Complete the Learning Journal Questions on the next page.</p> <p>Take time to reflect on and record why you are attending the Program and what you hope to achieve.</p>

Your Learning Journal Reflection

In preparation for the program, please reflect on the following questions and write your responses in your notebook.

1. What is your purpose in attending the Program?
2. How are you going to make the most of the experience?
3. What do you hope to achieve from the Program?
4. What if any concerns do you have about attending the Program?
Explore your thoughts and feelings.

Think of a leader whose attributes you admire and would like to emulate:

1. What do you think is / was his / her purpose?
2. What does / did he / she do well?
3. What behaviours do / did you value most in that person?
4. How would you like to be remembered as a manager or leader?

After Workshop Day 1

Please take some time to reflect and record your thoughts on the following questions.

Add your responses to your notebook.

1. What did I learn on Day 1? (Observations)
2. Why is that important to me, my manager and my team? (Thoughts)
3. How do I feel when I reflect on that importance? (Feelings)
4. How could I apply that learning? (Thoughts)
5. What specifically do I want to focus on to consolidate my learning? (Wants)
6. What obstacles could prevent me from applying my learning? (Thoughts)
7. How do I feel when I reflect on those obstacles? (Feelings)
8. What is my plan to overcome these obstacles? (Observations, Thoughts & Wants)

Before Workshop Day 2

Checklist

<input type="checkbox"/>	Review	the notes you have made in your notebook regarding your Improvement Goal and the outcome of your discussions with your supporters about that goal. You will be working with your "final" Improvement Goal during Day 2. Please read the Immunity to Change™ Process Steps section starting on page 13 in preparation for Day 2.
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Workshop Day 2 - your Immunity Map

Please refer to the notes following the tables for details and guidelines.

1. My Improvement Goal	2. What I am doing and/or not doing instead	3. My Worries & Competing Commitments	4. My Big Assumption/s

1. My Improvement Goal	2. What I am doing and/or not doing instead	3. My Worries & Competing Commitments	4. My Big Assumption/s

Immunity To Change Process Steps¹

Column 1 – Identify Improvement Goal (“One big thing”)

Goal selection criteria:

- It is not an outcome or result - it is a change to your way of being or thinking
- It is true for **you** (rather than something that someone else thinks you should work on)
- It must be **about you** – something you want to change that is not dependent on others changing, or you changing them!
- It feels really important to you - 4 or 5 (on a 5 point scale)
- There is plenty of room for improvement and future growth
- It is stated as a positive, not as a negative (for example: if you "want to stop getting reactive to negative feedback", express your goal as what you want instead: "I want to seek feedback and learn from it")

Column 2 – Doing/not doing instead

What are you doing, or not doing, that gets in the way of achieving your goal?

In Column 2 make a numbered list (1, 2, 3 ...) of the behaviours that you do, or don't do, that work **against** you achieving the goal in Column 1. Add as many of these as you can think of – the more the better! List them as a series of separate numbered points, not as a long “story”.

Please check each one against these criteria:

- Keep the list to **specific behaviours** (e.g. “I stop listening”) rather than generic explanatory behaviours (e.g. “I don't communicate well”)
- Refrain from listing reasons about why you engage in these behaviours – “reasons” belong in a later column
- List **only** those behaviours that undermine or work **against you** achieving the goal written in Column 1

¹Adapted from “Immunity to Change” Kegan & Lahey; (Harvard Business Press) 2009.

Column 3 – Hidden Competing Commitments

Step One: Identify fears / worries / concerns and record them in the “Worry Box”

For **each** of the Column 2 behaviours ask yourself: "If I imagine doing the **opposite** of this behaviour – what do I think will happen?"

"If that happened, what is at risk for me?"

"What are my worst fears about what would happen?"

Write your fears in the top part of Column 3 (the Worry Box). For each numbered item in Column 2 write your Column 3 responses with the corresponding number so you have a matching list.

Step Two: Identify Competing Commitments

What do you commit to doing / being in order to make sure the things you are afraid of don't happen? Start each with: “In order to prevent my fears coming true I am committed to”

- It should be clear how this commitment is self-protecting.
- It should show how your Column 2 behaviours (what you are doing or not doing instead) make perfect sense. i.e. as behaviours that would "obviously" appear as a consequence of your Competing Commitment.

Once you're finished, you can draw two arrows that connect the first and third columns. These arrows represent the countervailing commitments that cancel each other out and keep you stuck and “immune to change.”

Refer also to the sample Immunity Maps in the Introduction to Overcoming Immunity to Change™ document. Each map has a section below it called "Understanding the immunity". Those examples will help you make sense of your own map.

Column 4 – Big Assumptions

Identify any “Big Assumptions” you hold for each of the Column 3 commitments.

These assumptions will:

- Show why the 3rd Column Commitment feels absolutely necessary
- Involve “bad things” happening to you
- Be associated with negative feelings (e.g. makes your stomach tighten - that’s a good sign!)

For each of your Column 3 commitments, ask yourself a question in the following format:

“If { *the **inverse** of your commitment* } then { *some terrible outcome for you* }”

Examples and guidelines:

1. It is very important to keep the **exact** wording of your commitment then simply **negate** it.

So, if your commitment was “I am committed to always being in control” then the inverse is “If I am **not** always in control, then ...” rather than “If I am never in control then ...”

If your commitment was “I am committed to never being seen as incompetent” then the inverse is “If I **am** seen as **in**competent, then ...” rather than “If I am not competent, then ...”.

2. For the part after the “then...” you are looking for the bad thing could happen that has implications for you personally - a feeling with a flavour of “that would be the end of the world for me”.

3. What you are trying to uncover is “What big assumption/s are driving my Column 3 Commitment/s?”.

Note: What makes a Big Assumption “Big” rather than merely an “ordinary” assumption, is the belief, implicit or explicit, that what we assume to be true is **always** and **completely** right in **every** situation.

A “big assumption” automatically informs how we “see” reality. That is, it is “behind” the eyes, so to speak, rather than in front of the eyes. We are “subject to” that assumption – it “drives us” rather than the other way around because it is trying to keep us safe behind the scenes. It goes into action immediately it detects a situation that relates to the Big Assumption.

See the “understanding the immunity” tables in each of the sample maps in the Introduction to Overcoming Immunity to Change™ document.

Achieving Your Goal – Overcoming the Immunity to Change

As Kegan and Lahey state:

“Seeing how our self-protective motivations systematically prevent us from achieving exactly what we most desire is necessary. Insights can be powerful, even exciting, but they do not necessarily lead to transformation. Most people need a structure to help them channel their aspiration, test and gain distance from their big assumptions, and steadily build a new set of ways to bridge the gap between intentions and behaviour.”²

In essence, our immunity map takes us from being unconsciously immune to consciously immune. To achieve our goal we need to work on becoming consciously released from the big assumptions so that we can choose the behaviours we want, and eventually unconsciously released so that we do not even have to think about our behaviours.

Please review **The four stages to releasing your immunity** in the Introduction to Overcoming Immunity to Change™ document.

We recommend you explore two parallel processes to achieve your goal. These involve Testing Big Assumptions and Changing Behaviours. These are adapted from Chapter 10 of Immunity to Change. Details follow.

Observing your Big Assumption

Observe the assumption in action

Through mindfulness practice become an observer of yourself. Notice when and where your big assumption is activated. Keep a journal and write down every instance when you realised your Big Assumption was at play. What was the trigger, what did you do?

Find counter examples

Reflect on your past history and current behaviours to look for counter-examples to identify when it does not hold true. You are looking for **evidence** that perhaps your Big Assumption is **not always true**. Perhaps it is context based after all.

Testing your Big Assumption

Experiment design

Perhaps the most powerful lever for overcoming the immune system is to continually design and run tests of the big assumptions. The purpose of these tests is to gather information about what happens as a result of the test in order to revise the big assumption. The purpose is not to make progress on the goal itself, although this might be a welcome side benefit.

It is helpful to approach the testing with the stance of a research scientist. What you want to do is gather data which you can then interpret to see what aspect of your big assumption, if any, is confirmed and what aspect, if any, is disproved.

² *Immunity to Change, Chapter 10.*

Experiment guidelines

Step 1 - Choose assumption to test

If you have identified more than one big assumption, choose the one you think will make the biggest, most positive difference for you.

Step 2 - Design a test

Design your first test applying the following criteria:

Safe

Make sure it will be possible for you to carry out a safe test of the assumption and start with a small test that is easy to implement. If the assumption has catastrophic consequences, you may need to work back and identify a prior assumption in the sequence that leads up to the catastrophe to test.

For example, “If I disagree with my boss I will be fired” may be hard to test because the feared consequences are so extreme. Possible assumptions, earlier in the sequence, which could be tested, are: “If I disagree with my boss he will get upset”; or “If I disagree with my boss, even once, he will not listen to me in the future”.

Timely

Ensure that you can carry out the test in the next week or so. Ideally it will be easy to carry out and form part of your day to day work.

Write it down

It is very important that you write down your tests and their outcomes in your notebook.

Remember that your Big Assumption was previously "hidden" and you were "subject to it". The idea is to "make it object" so you can think about it (which was not possible when it was hidden). You are trying gain choice about when and where it might apply, or might not apply, now and in the future.

Since your Big Assumption had an "end of the world" implication for you it will take some practice and reflection to "make it object". Journaling about it is, by definition making it into "object" by converting your thoughts and feelings into words on paper that you can see and review. The more times you do that the faster your assumption will become thought patterns that you are *reflecting upon*; that is, an object in your mind.

Step 3 - Interpret the results

See what happens and then reflect on what those results tell you about the certainty of your assumption – to what extent, if at all, is it valid? To what extent is it invalid? Write all that down too. Return and re-read the results of previous experiments to further objectify your process.

Step 4 - Continue testing

Keep running tests of bigger scope each time until you think you have overcome the immunity the big assumption was driving.

After Workshop Day 2

Daily Journal

Each day, for the next couple of weeks, at a time that suits you, **take 3 minutes to reflect** on an experience you have had during the past 24 hours. This can be an experience you feel good about or one that is / was bothering you.

In your notebook draw an Experience Cube® and fill in the Observations, Thoughts, Feelings and Wants for yourself. Then, if another person was involved in the situation, put yourself in their shoes and do an Experience Cube® *as if you are them* (as per the Multiple Perspectives exercise you did during Day 1 of the workshop).

This daily reflecting and writing is an important process to help your brain make the neural connections necessary for these processes to become an habitual form of thinking. With this practice they will become increasingly available to you *in the moments you need* them rather than after the event.

Your Big Assumption

As part of your reflection, pay attention to when you noticed your Big Assumption at play. See the section **Observing your Assumption** above for details. Write your reflections in your notebook.

After a couple of weeks of this reflection you might want to move on to the **Testing your Big Assumption** as detailed above. The reason for the delay is that we have found that change is much more likely if you have made your Big Assumption sufficiently "object" rather than being "subject" to it. It is hard to design an experiment when you cannot see it running!

Checklist

<input type="checkbox"/>	Complete	your Welcome Survey online: Log your Improvement Goal together with a list of your nominated supporters.
<input type="checkbox"/>	Meet	Meeting with your Manager Schedule a 30 minute meeting with your manager following Day 2 and share your learning, progress and application Meeting with your Learning Partner / Trio Swap notes about your learning, progress and application

Before Workshop Day 3

Checklist

<input type="checkbox"/>	Watch	You will need about 100 minutes in total to watch and/or listen to the items in the Before workshop 2 section of the online resources: http://www.curiosityskilledthecat.com/index.php/doeswiresources
<input type="checkbox"/>	Collect	a real conversation you need to have and have been putting off as discussed at the end of Day 2. You will be working on this in private during Day 4. Some challenging conversation scenarios to work with as a group.

After Workshop Day 3

Please take some time to reflect and record your thoughts on the following questions.

Add your responses to your notebook.

1. What did I learn on Day 3? (Observations)
2. Why is that important to me, my manager and my team? (Thoughts)
3. How do I feel when I reflect on that importance? (Feelings)
4. How could I apply that learning? (Thoughts)
5. What specifically do I want to focus on to consolidate my learning? (Wants)
6. What obstacles could prevent me from applying my learning? (Thoughts)
7. How do I feel when I reflect on those obstacles? (Feelings)
8. What is my plan to overcome these obstacles? (Observations, Thoughts & Wants)

Before Workshop Day 4

Checklist

<input type="checkbox"/>	Check	you have a real conversation you need to have and have been putting off as discussed at the end of Day 2. You will be working on this in private during Day 4. you have some challenging conversation scenarios to work with.
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After Workshop Day 4

Please take some time to reflect and record your thoughts on the following questions.

Add your responses to your notebook.

1. What did I learn on Day 4? (Observations)
2. Why is that important to me, my manager and my team? (Thoughts)
3. How do I feel when I reflect on that importance? (Feelings)
4. How could I apply that learning? (Thoughts)
5. What specifically do I want to focus on to consolidate my learning? (Wants)
6. What obstacles could prevent me from applying my learning? (Thoughts)
7. How do I feel when I reflect on those obstacles? (Feelings)
8. What is my plan to overcome these obstacles? (Observations, Thoughts & Wants)

Your Big Assumption

At this point you have probably moved on to **Testing your Big Assumption** as detailed above. Continue to run experiments and record your results in your notebook. Take the time to review the outcomes of previous experiments and observations so that the Big Assumption and the emerging Improvement Goal become even more "object" in your mind.

Checklist

<input type="checkbox"/>	Meet	Meeting with your Manager Schedule a 30 minute meeting with your manager following Day 4 and share your learning, progress and application. Meeting with your Learning Partner / Trio Swap notes about your learning, progress and application.
<input type="checkbox"/>	Practice & apply	Tools and processes learnt in program
<input type="checkbox"/>	Reflect	Continue reflecting and journaling in your notebook.

Your on-going development

As a whole this Leading with Influence Program is a repeatable process for which you now have a manual:

1. We began with your desired Improvement Goal.
2. We explored why that goal was important to you and the felt sense of the desired behaviour in the future. We explored the obstacles you might encounter and constructed some strategies to deal with those obstacles should you encounter them.
3. You got feedback from people who know you so you could refine your goal so that it felt very important to you.
4. You recruited your support team to give you on-going feedback about when your Improvement Goal and/or Big Assumption showed up.
5. You practiced the ***technical skills*** around experience, perception, systems, communication, multiple perspectives, emotional systems, etc.
6. You kept a journal thus helping your mind shift thoughts and feelings from Subject to Object.
7. You worked on your ***adaptive change*** (Improvement Goal / Big Assumption) by running experiments and collecting data to release yourself from the hold that Big Assumption had over you.

What is your next Improvement Goal?

We encourage you to continue your development. It is never a place we *arrive at*. There is always something new to learn about ourselves, others and the world in general.

We wish you well on your journey and look forward to meeting you on the path.