

*Your Values
Workbook 2*

Values-Based Self-Assessment

by

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To act with integrity, you must first know who you are. You must know what you stand for, what you believe in, and what you care most about. Clarity of values will give you the confidence to make the rough decisions, to act with determination, and to take charge of your life.

Kouzes & Posner 2006

Welcome

Welcome back. I say 'back' as I am assuming that you have finished Values Workbook 1 where you will have completed your values wheel, i.e. your visual representation of what matters to you most in life. If you have not done this, go back and get that done and I will see you here again soon¹.

In this Workbook, you will assess your current life and behaviours for how they either support or undermine what you most value. Next, you will find any gaps and work to close them. There is also a section on how to use your core values to support you when you're facing a major decision. Finally, we will talk a little about mindfulness. Don't panic, it doesn't hurt and I'm not going to over-promise on its abilities.

Let's get into it! But first I want to share a story about my experience with values and what they mean in my life.

When things don't feel right

I take my advice (sometimes) and get my own values wheel out and do the kind of assessment this book describes. Sometimes I forget. I am human and as such, I own many of the imperfections you might expect. I forget to reconnect for a few weeks, or even a few months. If I come back to my wheel at a time when something is feeling not quite right, the explanation is always there in front of me.

I'll explain, but do feel free to skip ahead to the next session if you are convinced and/or my stories are not that interesting to you.

My approach to having my own small business is also to have a part-time contract. This gives me reliable and consistent income and a platform to then take more risks in what else I do. This reliable base is important. I am a single parent with two mortgages, three pets, and a range of chronic health issues.

The contracts I have run over the years have been varied and interesting and I have not regretted any of them. I understand now I could have perhaps left one of them sooner.

In this particular contract, I was a year or so in and feeling uncomfortable. One morning I woke up and thought about the telephone calls I needed to make.

¹ Look to the end of this eBook for details.

I hate calls at the best of times, and the conflicts that can blow up. I like conflict even less than phone calls. I reached for my phone and went direct to local job vacancies listings. It was hard to miss that strong sign that things were not quite right.

I started an argument in my head, one that at this time was becoming quite common...

"You know this role suits for now. Sure, you are being underpaid, yes, the gender pay gap stuff makes your blood boil, yes, you think it might be gendered. But you like the projects you are on, and most of the people you are working with. You are learning and you love learning."

"But..." says the voice on the other shoulder...

"I don't like some of the ethics I'm seeing and the level of micro-management is insane. I can't stand being micro-managed. I can't even send a client an email until it has been picked over more than vultures pick over bones".

Back and forward, and back and forward, and eventually I dragged my sad arse to my desk to try to face the day, with a heavy heart and mind. Instead of getting to those calls, after staring forlornly into my lukewarm cup of tea, I finally dug out my wheel.



And there it was, clear as day, literally right under my nose. Someone who values Freedom as strongly as I do, and describes it to include 'independence' and 'choice' is not going to cope well with being micro-managed?.

It didn't end there. My Justice value has two parts. One is about fairness and the other is more about the rights of the underdog. Thus, when someone tells me to do something and then forgets and criticises me for doing the exact thing they ask, my Justice value riots. My Justice value was also having a rough time with the gender pay gap; for the principle almost more than the cash itself.

There was also some treatment of others I was observing that did not sit right with me. I understand that my expectations are almost (ok, totally) unrealistically high and that there are lots of shades of grey in this life. Still, understanding where my values clashed with what I was experiencing helped me understand why I reached for the internet and job ads that morning.

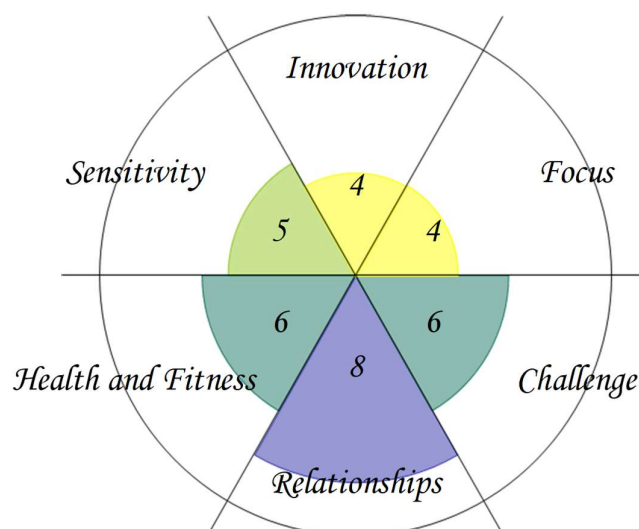
This understanding was important for many reasons and did not mean I had to necessarily quit the role then and there. I will tell you more about this in future books. But for now, I will say it was some time before I resigned. There were complex reasons why this was so. However, it did stop the arguments in my head and helped to put a clear plan in action. This clarity also meant that rather than randomly scrolling through job ads, I crafted a clear description of what would be a values-aligned contract for me, and went to the market with that information. I stipulated I wanted a role that would make a difference, that reported to a high-trust, hands-off manager (i.e. one who allowed me to express my Freedom value), and finally that I would be paid fairly. I realised these things mattered more than the actual work I would do.

How are you doing?

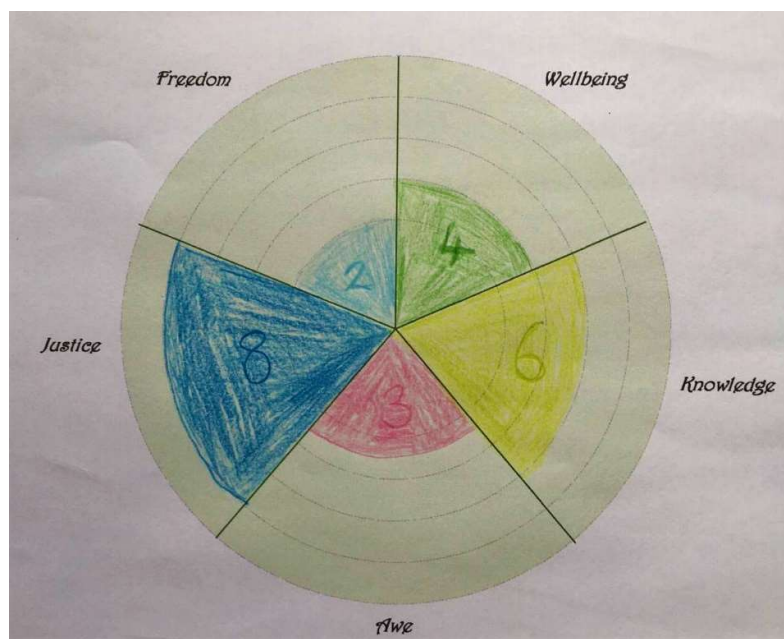
It is time now to articulate how your core values are currently being fulfilled, or not, in your life. Please be kind to yourself. This is not an assessment of how hard you are working or how good you are at life. This is just what is happening for you right now.

Many of the things influencing your values are not even in your control. For example, if one of your values is to be healthy you could be scoring low because you are eating cake and sitting on the couch. Alternatively, your low score may be due to having just been diagnosed with a major illness that has nothing to do with how 'hard' you worked on your health. Likewise, relationship values can score low because of a loss, or the actions of someone else; again things that are outside your control.

Get the wheel you created in Workbook 1. It should look something like this image below, but with your values on it and without the shaded bits.



Imagine there are ten ever-decreasing concentric circles. Now, go around each slice of your values pizza and score (and shade) how you are feeling from 0 to 10. I have shown a hand shaded example in case this is not clear. You will be able to tell that I am not a mindful colouring convert.

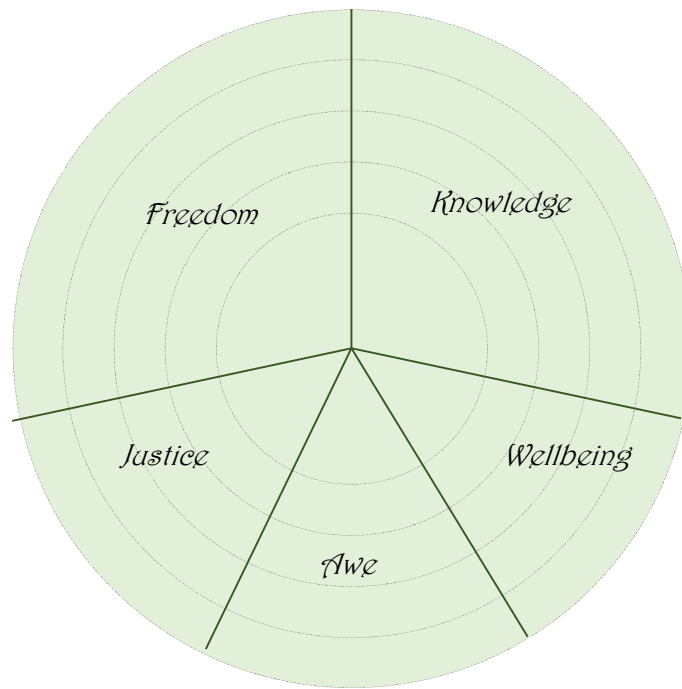


Zero means things could not be worse, i.e. you are not getting this value fulfilled in your life. Ten means things are perfect. Perfect is when nothing you or anyone else could do to make things better in that value (slice of pizza).

If you wish, you can give yourself an overall percentage score. To do this: add up your score for each slice, divide by the highest number possible (so for five slices the highest number would be 50), now multiply your answer by 100. This will give you a percentage.

This is a rough and ready overall representation of the detail of the info in the wheel. However, my experience is usually the total score resonates with how happy or fulfilled a person feels. That is, someone scoring 70% usually says, "yeah, I feel about 70% happy just now".

If your percentage score and sense of life now are very mismatched, there are a few things that could be going on. Perhaps there is a value missing, or two values are very similar and should be merged. Go back and work through Workbook 1 again or get in touch regarding some one-on-one sessions. Alternatively, it might be that one or two of your values are MUCH more important to you than the others. If this is the case, don't fret about the overall score and consider adjusting the sizes of your pizza slices to suit. However, before you leap to this conclusion, I do not see this very often. Below is an example of a wheel with different value priorities. This is a wheel which values Freedom and Knowledge above all else.



What now?

You should now be clear on your values from Workbook 1 and understand how your current life is working, or not, in regards to what you value most from the tasks above. Well done.

A wide and varied range of emotions is to be expected here. This is OK. What you are feeling is unlikely to be something we have not seen before. Just as values are not right or wrong, nor are your feelings at this point.

Do remember, whether your wheel scores are high or low, it is likely to be the result of some things within your control as well as some things NOT within your control. For example, for someone with a low Fitness value, it may be because they are not taking enough positive actions or because of a recent injury meaning their activities are limited.

Of course, there is the thought, and multiple books written on the subject, suggesting that you can always control your responses/feelings. That you can simply change your attitude or feelings to your life and all will be tickety-boo. Sure, there is some truth in such advice and at times it can be just what the doctor ordered. But also it can feel a little like rubbing salt in open wounds. *So, your marriage is in tatters and you just lost your house and got diagnosed with a chronic illness...well, change your attitude towards it, 'think positive' and you will instantly be #LivingYourBestLife.* These sorts of sentiments are likely to make you feel that not only is your life in tatters but somehow it is your fault. That you didn't try hard enough.

This is not the approach we take at this point. Sure, there is a place to work on your attitude and optimism (this is very different to simply thinking positive). However, now is the time to start looking at what you can change.

With that said, let's start considering where you are now. How did your scores in each area of your wheel go? Choose the option below that best describes where you are after your scoring process.

Scoring very low in most/all areas?

You are not alone here either. Although there may be areas where you could make some gains. If you are feeling very low in all areas, you may also be feeling depressed, or anxious overall. It is very hard to proactively do the kind of work I am talking about if you currently feel like you are walking through mud in gumboots (to use our local mental health awareness metaphor). If this is the case, it is time for support, for a step up. To talk to experts and survivors.

Do please take my strong recommendation to get support here. I have seen many people in this place in my coaching career and so often there is resistance to getting the right help. I assume this is due to the stigma that unfortunately still exists around mental health. If you had a broken leg and your friend said you need a doctor not a run, you know you'd take their advice. The same is not always true for mental health.

This is something I have experience of living with. It took me many years of battling chronic anxiety in several flavours (generalised, health, phobias) before approaching professional help, and also medication, with confidence. It is not that I was not taking action; I did a Diploma in Hypnotherapy and a PhD in wellbeing including mindfulness. I was so very fixed on going a natural route and DIYing the thing. Turns out getting medicated for anxiety changed my life almost completely. I am not saying you should get medicated. I am saying seek help from the right professionals and be open to the suggestions they offer. Also, do please shop around for your professionals with the same enthusiasm you might shop around for a car or even a new pair of shoes. Consider their experience, what memberships to which professional bodies they hold, and how the relationship feels to you. There is no shame in professional help just as there is no shame in medication. I am now actually proud of my ability to ask for help when I need it. After you have reached out to get the immediate, first aid sort of support you need, I am sure you will be back and I look forward to partnering with you then.

It's a mixed bag?

Of your five to seven core values, are some scoring very well and you are feeling pretty good, and others are middling to low? I am starting to sound like a broken record; you are not alone. This is the most usual place to be.

For complex reasons, some values are usually more consistently looked after or supported. My values around Learning and Knowledge often score a full 10, with little effort on my part. Or at least, with little battling or conscious effort. It so happens that my personality, life choices, and natural interests drive me easily and joyfully in this direction. I did a PhD for fun and that pretty much sums me up in this way. It is not that I am so fabulous, it is simply a matter of chance and luck that in this area my skills and interests align with what I value. That the 'work' needed to achieve these values is what I choose to do for fun. Also, my work supports these values and often I have tasks or deadlines for others. People are much better at honouring promises or commitments to others than themselves, so this too keeps me on track. This is good to know and something we will be 'hacking' in later eBooks.

Now let's talk about my Health and Wellbeing value. As mentioned, I am the proud owner of multiple mental and physical illnesses. I also really value my health and wellbeing. It would be natural then, would it not, that I would find it easy to do activities that I both value and are very important to how I experience my day-to-day life. Um, no. This is the value I consistently struggle with the most. I see the irony – now. I am hoping that by being transparent and more than a little human here, I will help you on your journey. When I was very sick, in bed many days of each week, underweight, anxious and

nauseated most of the time – I was an absolute angel with my health behaviours. I was on a strict diet for my gut issues, I stuck to one glass of wine a week (and I love wine), I meditated for hours every day. If you had asked that person if I would be very careful with my health in the future, I would have thought you were insane; of course I would!

Fast forward several years and I feel pretty good most of the time. I have the odd manageable flare. But mostly my life is very normal. I am 16kg heavier. My health behaviours are patchy, to say the least. I beat myself up about this and then they get worse. Then I remind myself what I know about values, about habits, about psychology, and I realise that sheer willpower is not going to work and I understand that my Health value is likely always to be my Achilles Heel. While my Knowledge and Learning values need almost zero conscious effort on my part, my Health one needs massive time and attention.

Not everyone has this kind of relationship with their values. But many do. Just because you don't make consistent values-aligned behaviour choices does not mean you don't value it. Some smokers and alcoholics value their health and some cancer survivors don't. It is tempting to look at someone's behaviour and make assumptions about what they value. Just **Don't**.

So, you have a mixed bag in your first scoring. Often, I do too. The more I score and the more I consciously work at it, the more the gaps close. For now, give yourself a wee hug and say – good on me for doing this work.

Next, choose one of your lower scored values and simply write one or two small actions you can take to support them in the next few days.

Do please keep it manageable. At this point I often see people setting over-ambitious tasks, in the manner of new year's resolutions. We know how they often end? Perhaps your Relationship value is low; a simple task like phone an old friend will do. Your Health value is low; take a gentle walk in nature.

This is all you need to do for the next few days. The next Workbook will take you from here.

Feeling good about all your scores?

This is great news! I would suggest you set some goals and actions around maintaining these levels. Values are like cars and relationships; they need regular care and attention to stay in good running order. The next book will show you how. But for now, take a few days to pat yourself on the back and get on and enjoy your fabulous life.

Case Study

When Rachel took me through the values exercise nine years ago there were a lot of surprises in it for me. Firstly, about who I am.

I was startled to discover that one of my core values is Status. Before the values session, I would have said that status was not important to me at all. The process allowed me to acknowledge that it is indeed important to me. I care what people think of me and I like to be in charge. I did not immediately see this as a good thing. Fortunately, there were some other values such as human rights, equality and fairness which I interpret as meaning that even if status does matter to me, I will not impinge on other people's rights or happiness to achieve it.

I know now that values are not the same as morals or ethics and it is no use applying judgements to them, they are just the 'things and stuff we would rather have in our lives than not'. I also know that we are judging machines and often judge ourselves and others for the values that we hold.

The next surprise was bigger still.

I had spent 30 years living in the same town, married to the same man, working for the same employer, socialising in the same group, reading the same type of books, playing the same sports. My values are predominantly around change and variety with descriptors like 'just do it', 'take charge', and 'travel'.

When I assessed my values on the wheel, my overall score was low and showed I was very unhappy. I was able to acknowledge this was accurate, despite generally seeing myself as a happy person. In addition to the lack of variety in my life, I had also just been made redundant which was outside my control and was affecting my mindset, not to mention my Status value. I now understand that knowing my values let me see the change as an opportunity, not a setback.

I changed everything, except the husband; I rather like him. My new life involves lots of change and variety, a new job, lots of travel, lots of new experiences. I repeated the values exercise six months later and, not surprisingly, my overall scores and the corresponding sense of happiness and fulfilment had gone from low to high and remains so to this day.

Something not sitting right with you?

You may have come into this process because there was something you were struggling with. Perhaps a relationship, your current job, your overall career direction, or uncertainty about changing where you live.

The process so far has probably helped you hone in on what your discomfort with a current situation was. However, some of you may still be left facing a decision and you are not certain which way to go.

Usually, in any decision, there are at least two options. For example, stay in this house or move to the country. There may be more, e.g. move to a new house but remain in this area. Your values wheel is very useful for making those tough decisions.

Let's work through a scenario to explain the process. Let's take Suzie whose values are Innovation, Focus, Challenge, Relationships, Health/fitness, and Sensitivity. Suzie has been offered a promotion at her current job as well as a new (bigger and more exciting) job that involves more travel and some nights away from home. Suzie has two primary school-aged children and a husband who also has a demanding job.

The image below shows the two wheels that Suzie has drawn for each role. Suzie then estimated how she thought her values might be tracking six to 12 months into each role. It was important to consider a little in the future - after the honeymoon phase has passed. I have provided a little more information in the headings and notes below. Notice the overall totals are similar; however, the 'local promotion' wheel is much more balanced.

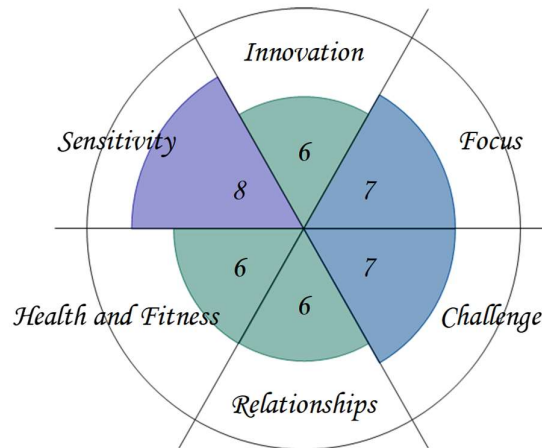
Balance is important. One of the very reasons this tool uses a wheel is that balance does matter for values, as it does for actual wheels, to move smoothly forward. Out-of-balance wheels are difficult to

maintain. Often, very low scoring slices are a risk for drawing overall scores down. Misery loves company.

Suzie would be strongly advised to seriously consider the less exciting job, for the sake of a more fulfilled life. Or even better, continue looking for a more exciting role closer to home.

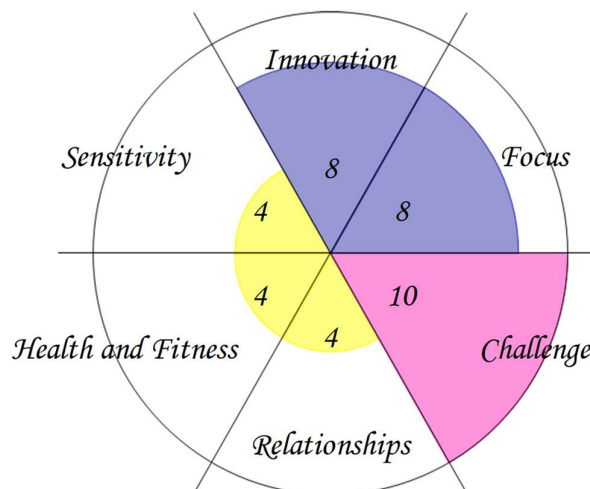
Local Promotion

The promotion carries less excitement, but still some. It is better for her key relations and health, as well as her Sensitivity value which is due in part to her ability to continue her role in the local Buddhist centre.



New Job (with Travel)

The new job is full of challenges and exciting things. However, it involves more time away from her family (meaning her Relationship value suffers). The travel also disrupts her routine and her role in the Buddhist centre, dropping her scoring in Sensitivity as well as Health and Fitness. Hence the overall wheel here is quite unbalanced.



Although I created this scenario for simplicity, it is very similar to the examples I take people through all the time. I used this example for another reason, which is that the option that feels like the best or most exciting - the one we are often drawn towards - is habitually one that works for some values and not all. Frequently, I see people again further down the track. By which I mean, for example, I meet Susie for coaching again a year after she took the more exciting job and her life and happiness is suffering.

Let's Take Baby Steps

In Workbook 3 we will address setting values-based goals. But firstly, let's go slow, let's take a few baby steps and give the process time to settle in. This is no 'five-minutes-to-a-better-you-in-three-easy-payments' process.

Over 20 years of coaching has taught me lots of things. One of them is that a gentle step in the right direction is often the best place to start. But not always. Sometimes major life events, health scares or total disruption in your normal life mean that 'going hard' works – if you think that is you, charge on as fast as you like.

But for most of us, most of the time...slow and steady wins the race. For most folks, my advice is don't download Workbook 3 today. Yes, I said that – don't buy stuff from me, at least not today.

Give yourself a few days to make some very small tweaks, to get some runs on the board, and to sit with where you are now.

Same with big decisions; sit on them for a bit...see how it feels. Especially if you are reading this in Covid19 Lockdown (as is the situation, as I write this). Perhaps you just decided to leave your marriage. But your marriage has never faced this type of pressure. So, assessing the health of your marriage based on the past month is unlikely to be an accurate view of it.

A useful skill in practising this 'sit with things for a bit' is...yes, mindfulness. So, let's talk about that for a bit.

Be Mindful

Mindfulness is paying attention to your immediate experiences with curiosity and acceptance.

There are many definitions of mindfulness. The good news is they have more in common than not. This is my version. Mindfulness is far from the new trend it may seem. It dates back more than 2000 years to the oldest preserved Buddhist text. Within the Buddhist tradition a '*clarity of attention*' was crucial to the '*acceptance of the nature of reality*'¹.

It's not just Buddhists on the bandwagon; most religious traditions have some form of meditative practice² and these ancient practices have made their way to the mainstream. Teacher and Vietnamese monk, Thich Nhat² brought loving-kindness meditation and contemplative walking to the mainstream.

Recently, mindfulness has hit popular culture. I'm sure you have noticed the new-release shelf in bookshops and the plethora of mindfulness titles. Titles for every area and walk of life from mindful parenting to mindful leading and eating and even colouring.

I don't see mindfulness as the magic cure-all it often gets sold as. There is good science showing mindfulness to be effective with helping anxiety, risk of depression relapse, depressive symptoms, stress, chronic pain, quality of life, and psychological symptoms in patients with cancer³. There are some exciting things too, e.g. one study showed very experienced meditators had improved grey matter density in regions of their brain⁴ through mindfulness. How cool is that?

I witnessed some of these benefits firsthand during my PhD⁶. I supported 110 doctors, nurses and office staff in the West Australian health department through six weeks of mindfulness meditation. Many reported a surprising improvement in stress levels from practising for as little as five minutes, three times per week.

I am keeping this brief on purpose. I do encourage you to explore the books, videos, apps etc on the topic. For now, I will give you some quick and dirty tips to get started. Mindfulness can be practised via structured meditation sessions or by mindfully approaching day-to-day tasks or experiences; of course, ideally both!

If you haven't tried mindfulness before, don't be fooled by its apparent simplicity. It is simple, but for many (me included) it is far from easy, at least at first. When you first start it is like trying to write with your wrong hand, while not thinking about writing or your hand. The good news is trying is enough. By doing the practices, the benefits are there – regardless of how you might score yourself in terms of your mindfulness performance.

To get started you could try the exercise below or try one of the many smartphone apps or recorded sessions that you can find on most music platforms.

Mindful Body Scan

Find a quiet place: Sit or lie in a comfortable place where you will not be disturbed for five to 15 minutes. Focus on letting go of the pressures of the day.

Imagine Stillness: Now imagine something that gives *you* a sense of stillness. It may be a nature setting (real or imagined) or a wonderful experience from the past. Use all your senses to absorb yourself fully into this setting. How does it make you feel? What can you see? What sounds are around you? What are the sensations on your skin (perhaps you feel a cool or warm breeze)?

Scan your body: Gently let go of the image above and scan each part of your body, starting with your feet. Notice how your feet feel. Do not try and change anything, just notice your feet, what temperature are they? Can you feel them touching your shoes or the floor? What other sensations do you feel? Now move to your calves, knees, thighs and so on...until you reach the top of your head.

Open your eyes: Slowly return to your normal activities. Notice how you feel calmer and more relaxed after your session. See if you can take this calmness into your normal activities.

Until we meet again

In the next Workbook, we will be exploring setting values-based goals. In the fourth and final book, we will discuss creating values-based habits. In this way, keeping you on track to achieving the goals you set in the next book.

For now, credit yourself with getting this far in the journey. Enjoy the next few days of noticing and observing you. Noticing where your values are supported and/or breached. Noticing what difference small tweaks make.

Take care and feel free to get in touch or join the group below.

Go well in the direction of your values.

Love,

Dr Rachel

About Dr Rachel

Allow me to introduce myself and explain why we are meeting like this. My background is in business, in executive coaching and consulting (in New Zealand, Australia and the UK). Although my career started in IT, it wasn't long before it struck me that success in business was about people; people being happy and successful and living a life that works for them. Business is at its best when its people are at their best.

Organically, over a 10-year period, my hobbies (devouring anything on health and wellbeing that I could) merged with my career. I found myself introducing entire organisations to the idea of understanding their values and the role of them in life and work success.

Much of my interest in personal growth was driven by my challenges of juggling my corporate career with multiple chronic (and at that point, undiagnosed) illnesses, as well as a long and winding journey with several flavours of anxiety (generalised, health, phobias, panic attacks).

For the majority of the first half of my forties, I had the privilege of taking a break from paid work to do a PhD (on scholarship) at the University of Western Australia. My PhD explored the link between the vagus nerve, social and emotional wellbeing, and work performance (using exercise and mindfulness meditations).

Currently, I am returning to a focus on coaching and employee wellbeing, bringing all these skills and experience together to do good. I am also juggling this with single parenting (of a child who has taken after me in health and wellbeing challenges).

I guess I am saying I have been in the trenches, I still am some days. But I have also learned some stuff along the way. My learnings come from my own experiences, and those of hundreds of clients I have supported through these values processes, as well as academic literature on a wide range of related topics.

I look forward to partnering with you, wherever you are in your journey.

You can go to our website and get in touch if you want any one-on-one support.

www.mcinn.es.associates or email me directly rachel@mcinn.es.associates.com

Disclaimer

Even though, as the graduate of a PhD, I can put Dr before my name which sometimes I do for entertainment purposes, I am not a Medical Doctor. This book is not intended to take the place of any professional help or support that you require. Working with your values can help you lead a happier and more successful life, but like all things in life, it is no magic cure-all. It will not cure any major physical or mental illness. I cannot offer you the moon on a stick. I am sorry. But just maybe I can stand with you, while you enjoy it more where it is.

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