Fail to Plan = Plan to Fail: Creating Your Blueprint

Participate
Perform
Produce

Leader Guide

This guide is a resource for small group leaders.
It accompanies Group Session 1 of the eLearning Series,
CultureEX™ Guided Transformation Process

LIFEWORK
SYSTEMS

Pre-Group Session Prep

Time: _____ minutes

ACTIONS

This leader guide is a GUIDE. You need not read it verbatim. Consider the intention for each section (written at the top of each section in this color) The times listed are simply *suggested* times and can be modified by the group leader.

☐ **COMPLETE** watching *your own* individual training module and filling out *your own* workbook answers.

☐ **NAVIGATE** entire group session at least once. Ensure the technology works.

☐ **STOP** when you reach a slide with a green continue button. These correlate with a section in the leader guide.

☐ **ANSWER** all questions yourself to use as an example. Also, write in your **goal** and **final word** for each section.

☐ **PREPARE** using the *notes* section for your answers, examples or clarifications so you can model/start the conversation.

☐ **FOLLOW** instructions in each section in order given.

☐ **OPEN** document "*Alternative ways to communicate about purpose and values.*" to create what you will do regarding *PURPOSE and VALUES* during the session.

☐ **SEND** a confirmation email a week prior to the group session if you wish. (see below)

♦ **TIPS** for you to remember as group facilitator:

1. Demonstrate full commitment. Your intention and modeling matter!
2. Start and end on time no matter who is or is not there. Ask for timeliness from your team.
3. Maintain pacing as best you can for time you've allotted for each section. You can skip answers and bullet points if needed to stay on track.
4. **Total Time** = Time *suggested* for each section.
5. **Pre-Vid** = Time video precedes before starting the facilitation of each section.
6. **Cumulative time =** Time elapsed in total for the session, at the end of each section.

EMAIL SAMPLE (Optional)

Hi everyone!

I'm looking forward to seeing you on (Day, Date, Time) for our group LifeWork Systems review session. Please be on time and ready because we have a lot of ground to cover and we will start and end on time. Don't forget to:

- Bring your completed workbook as *we will be reading our answers from them*.
- Make sure you have completed your post-training survey so I can see your input in advance of this session.
- Let me know if you need anything from me beforehand.

I look forward to seeing you soon!

(Your name)

NOTES

Section 1: We Always Begin With…Purpose

Time: 10 minutes

For the leader: The intention of this section is to help the group learn a. purpose is #1 and b. INVITE them to commit to it. c. values are behaviors that serve *to make sure purpose happens*. d. focus on one trust value and e. Review helpful tips.

Total Time is 10m (0m pre- vid) Cumulative Time: 10m

☐ **POST** or visually have open your organization's blueprint on a browser tab.

☐ **READ Goal:** "*My goal for this section is* _____ "
(e.g., "to *set the stage* for this session by beginning with our purpose and values.")

☐ **READ bullet points below** (Pull up your organization's blueprint)

- Our *purpose* is always THE highest priority; it shifts us from being **reactive** to **proactive**
- You are in charge of YOUR thoughts, feelings, and actions *no matter what.*
- *Purpose* is what we *cause* for ourselves and for others; purpose connects us to our internal motivation, our WHY.

☐ **READ** your organization's **PURPOSE** on the blueprint. Next, *share your unique way to highlight it.* (use "*Alternative ways to communicate purpose and values*") This could be a quote, story, video clip, meme, poem, question, etc.

☐ **READ** these *rhetorical* questions about **PURPOSE** (tell them **no out-loud answer is required**):

1. Will YOU intentionally focus on our purpose and commit to representing it?

2. Will YOU remain committed even if OTHERS drop their commitment to our purpose?

☐ **READ About CORE VALUES** (direct them to the core values in your blueprint) **Say:** "Our *core values* are behaviors we engage in to achieve our *purpose*." These are **NOT** the 8 values that build trust.

☐ **DELIVER** Next, *share your unique way to highlight* one or more CORE VALUE(S). ("*Alternative ways to communicate purpose and values*") This could be a quote, story, video clip, meme, poem, question, etc.

☐ **REVIEW** this trust value **Recognition (#6 on the blueprint under 8 values that build trust)**. Say, "*Recognition is acknowledging with appreciation everyone's gifts, talents and the value and opportunities in our differences too.*" Ask EVERYONE, "*When is it hard to exercise recognition?*"

☐ **READ** the following 5 helpful tips with your group when you as you end this section:

1. Speak in first person (use **"I"**). It will feel and be more *responsible*. I'll say "first person" if you forget.
2. "Stay in your yard," share only *your* experiences, opinions, and feelings.
3. Take initiative in participating. This supports your leader. Don't wait to be called on.
4. Keep your answers somewhat brief.
5. Write down all aha's and questions you think of *along the way*.

☐ **FINAL WORD** "*The main point of this section is to remind you that*_____ " (e.g., **intention** *is the most important thing to do in every moment.*")

NOTES

Section 2: Benefits of a Blueprint

Time: 15 minutes

For the leader: The intention of this section is so that people see the value of the blueprint now and later.

Total Time: 15m (2m pre-vid+ 13m) Cumulative Time: 25m

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____* "
  (e.g., *help you to realize the importance and high value of a blueprint for each person and organization.*")

☐ **READ** **bullet points** (sharing bullet points below is optional but recommended when time allows)
  - Just as any blueprint, yours communicates ideas and reasons for what you create.
  - A blueprint reminds you what you *cause* at your best.
  - Blueprints help you with your responsibility-based culture because everyone uses it to share their progress plan.
  - Blueprints help you become proactive, thoughtful about choices, and internally, intentionally motivated.

☐ **ASK** group the following 6 questions. Explain to them, "**These are not in your workbook**." **(12m) Note:** You have pretty much time so just pace yourself.
  1. **Which *benefits* on the screen are most meaningful and inspire you?**
  2. **What is lost when you are on auto pilot? What priorities in your life get overlooked?**
  3. **Do you think there's truth to the quote, "*Our deepest fear is not that we are inadequate; it's that we're <u>powerful beyond measure</u>*"? If so, what can you do to embrace being powerful?**
  4. **Do you notice feeling any resistance to this process? If so, how can you overcome it? If not, describe what you feel.**
  5. **What benefits will a blueprint provide you personally?**
  6. **How will your blueprint be of value during your monthly mentoring?**

☐ **FINAL WORD** "*The main point of this section is _____* "
  (e.g., *for help you understand the value and need for your own blueprint, using it to align your life and work with your purpose and values, so you live consciously, intentionally, and powerfully.*")

NOTES

Section 3: Clarifying Purpose

Time: **20** minutes

For the leader: The intention of this section is to support an understanding of an effective purpose and why it is more important than anything else.

Total Time: 20m (1.5m pre-vid + 18.5m) **Cumulative Time: 45m**

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
(e.g., *re-introduce you to the 7 steps in a responsibility-based culture, and your part in it with your blueprint that starts with purpose.*")

☐ **READ about bullet points** (sharing bullet points below is optional but recommended when time allows)
- Purpose is your north star; the target to point to whether in your own blueprint or the organization's blueprint.
- The most important step in your blueprint is your <u>purpose</u>; everything else flows from it.
- Your blueprint is a tool that gets you the support YOU need within your personal progress plan.
- Every person in every role is synching their intention and actions to co-create your healthy culture.
- Creating and maintaining *your* blueprint helps you become self-directed and make long-term, positive change

☐ **BREAKOUT** the group into pairs. Explain these instructions. "Please share with your partner your answers to the 4 questions on <u>workbook page 7</u>. You have _____ minutes." **(8m suggested)**

☐ **ASK** each person in the group to share with the group their purpose statements on <u>workbook page 8, question 4</u>, **(10m)**

Note: Purposes should not be what they do, or how they do something. Purpose should be what is ***caused* in all.** If a purpose is not inclusive of all, and if it is dependent on any circumstance, or if it is not memorable or brief, it is not a viable purpose.

☐ **FINAL WORD** "*The main point of this section is _____*"
(e.g., *that a responsibility-based culture requires* **purpose**. *Guiding yourself and others to purpose, especially when off track and discouraged, is vital to the health of one's self and the team.*")

NOTES

Section 4: Clarifying Core Values

Time: 20 minutes

For the leader: The intention of this section is to explain what values are and how they impact purpose.

Total Time: 20m (1m pre-vid + 19m) **Cumulative Time: 1 hour 5 minutes**

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
  (e.g., "*help you learn core values are always <u>servants</u> to **causing** the purpose. They are not random or separate from it.*")

☐ **READ about bullet points** (sharing bullet points below is optional but recommended when time allows)
  - Many select values as behaviors that sound good but are not always intended to *cause one's purpose*.
  - Core values are servants TO the purpose.
  - In your blueprint, values are unique activities, behaviors, and ways of being that ensure you cause your purpose.
  - Values as <u>activities</u> could be getting out in nature, listening to music, exercising, keeping a gratitude journal, or prayer.
  - Values as <u>behaviors</u> might be smiling in a mirror or saying a mantra, giving compliments, or eating well.
  - Values as ways of <u>being</u> could be *being a friend*; treating everyone as you would a best friend or *optimistic*, or *kind*.

☐ **ASK** the following questions of <u>EVERYONE</u> in this group. Explain to them, "*These are not in your workbook.*" **(10m)**

  1. **What does it mean that values are always *servants* to your purpose?**
  2. **What is one value you have identified? Is it an <u>activity</u>, a <u>behavior</u>, or a state of <u>being</u>? How does this value serve you in causing your purpose?**
  3. **How does or will having, considering, adding, refining, and referencing core values help you?**
  4. **Share 1-2 examples that demonstrate when you have lived <u>your</u> purpose, what it *caused*, and how it *felt*?**

☐ **ASK** the group turn to <u>workbook page 9</u> on *How Do I Clarify My Values?* Have each one share at least 1 core value from the list of what they do that helps them live their purpose and one value from the list they created to overcome a barrier. **(8m)**
  Note: if group is large, split them into partners.

☐ **FINAL WORD** "*The main point of this section is _____*"
  (e.g., *to recognize that <u>core values</u> are <u>related to</u> your <u>purpose</u> and also when you proceed forward in creating <u>visions</u> which are expressions of your purpose.*")

NOTES

Section 5: Clarifying Visions

Time: **20** minutes

For the leader: The intention of this section is to help people adopt a child-mind perspective so they open up the possibilities they would not otherwise open to. Vision is the third step in building a foundation for aligned action.

Total Time: 20m (36 seconds pre-vid + 19m) **Cumulative Time: 1 hour, 25m**

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
(e.g., *"help you understand the role of vision in relation to purpose and values and why to complete these before you jump into goals, procedures and roles."*)

> **Blueprint Step 3: Clarify Visions**
>
> In a blueprint, a vision has 4 parts. They are:
>
> 1. The vision statement (provocative proposition)
> 2. Why vision statement aligns with your purpose
> 3. Results - these do not explain *how* or *who*, just what outcomes desired at their best
> 4. Feelings (emotions not ideas)
>
> LIFEWORK   Continue

☐ **READ about bullet points** (sharing bullet points below is optional but recommended when time allows)
- *Vision* in our model is multiple *visions*. You may have visions for the organization, your work and personal life
- Most people resist defining visions because they think THEY alone must fulfill them or know how to do so
- When you write a vision and share it, *hold it lightly*. You have taken a big step just defining and describing it
- Let defining each vision be its own transaction and align with it, feel the joy of it before any next steps
- When you write visions that align with your purpose and values, it is a responsible and effective thing to do

☐ **ASK** the following questions of this group. Explain to them, "*These are not in your workbook*." **(5m)**

1. **Give examples of how aligning your visions with your purpose and values supports them in manifesting?**
2. **What is accomplished by leaving out *how* and having a child's mind*?***
3. **What is accomplished by writing down what you would be feeling as if your vision has manifested?**

☐ **BREAKOUT** the group into pairs and discuss the vision and all details (to the bottom of the page) that each person has written under #3 on <u>workbook page 10</u>. **(10m)** These can also be shared by EVERYONE as a group if time allows.

☐ **DISCUSS** briefly how you feel and what you learned about vision from your partner discussion. **(3m)**

☐ **FINAL WORD** *"The main point of this section is _____*"
(e.g., *"to see that your purpose, values and visions provide a powerful foundation to your progress plan to share with your mentor regularly. Your blueprint is a communication, planning, and self-accountability tool."*)

NOTES

Section 6: Clarifying Goals, Procedures & Roles Time: [15] minutes

For the leader: The intention of this section is to demonstrate how goals, procedures and roles are meaningful and helpful when aligned with purpose, values and visions. They also help people function with thoroughness, clarity and excellence.

Total Time: 15m (2m pre-vid + 13m) **Cumulative Time: 1 hour, 40m**

Clarifying Goals, Procedures, Roles

1. Review your **purpose** and **values**.
2. Consider one **vision** statement you expanded.
3. Define one SMART **goal**. Make it quantifiable and time-bound. Describe the overall *strategy*.
4. Identify and describe two or more **procedures** that are also quantifiable, measurable and time-bound.
5. Identify and describe who will play various **roles** in fulfilling the procedures. (look outside of yourself whenever possible)

LIFEWORK   Continue

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
(e.g., *"emphasize that goals, procedures, and roles do not come first. They are only done in alignment with the overall purpose, values, and visions."*)

☐ **READ about bullet points** (sharing bullet points below is optional but recommended when time allows)

- Most people set goals, without purpose, values, vision, and then often assign ALL goals and procedures to themselves.
- Sharing your blueprint is what helps a person hold him or herself accountable.
- Writing down everything from purpose to roles inspires internal motivation.
- Selecting goals, procedures and roles exercises your sense of choice so you are most likely to succeed.

☐ **ASK** the following questions of this group. Explain to them, "These are not in your workbook." **(5m)**

1. **How does aligning your <u>goals</u> with your purpose, values, and visions help you?**
2. **How is identifying your <u>procedures</u> important to excellence and managing your time?**
3. **What's one area you could delegate <u>roles</u> to another person or persons in the vision you have developed?**

☐ **BREAKOUT** the group into pairs (or discuss as a group) the example each has written under #3 on <u>workbook page 11</u>: **(7m)**

☐ **FINAL WORD** "*The main point of this section is _____*"
(e.g., *there is power and magic in aligning every step within a blueprint back to purpose, values and visions. The ends only justify the means when the means are aligned with these 3 first as the priority focus."*)

NOTES

Section 7: Jim Carrey: Purpose. Values. Vision.

Time: [10] minutes

For the leader: The intention of this section to demonstrate the strong emotional power when people tap into the best of who they are and connect this to the sense of meaningfulness in purpose, values, and visions.

Total Time: 10m (3.5m pre-vid + 6.5m) **Cumulative Time: 1 hour, 50m**

ACTIONS

☐ **SHOW** up to this slide with a green continue button →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
   (e.g., "*My goal for this section is to show you a real-life version of purpose, values, and vision.*")

☐ **READ about bullet points** (sharing bullet points below is optional but recommended when time allows)

   • Jim Carrey not only demonstrated purpose, values, and vision; he gave us things to reflect on about them.
   • His purpose to help people "relax and show the best version of themselves" is not tied to circumstances.

☐ **ASK** the group to turn to <u>workbook page 16</u> and have <u>EVERYONE</u> share at least 1 of the 3-4 answers they wrote. **(6m)**

☐ **FINAL WORD** *"The main point of this section is _____ "*
(e.g., "*to remember that when we tap into who we are at our best, we engage our heart, and we naturally align and manifest the best outcomes.*")

NOTES

Section 8: It Just Got Real

Time: 10 minutes

For the leader: The intention of this section is to magnify *awareness* and *management of behavior* change.

Total Time: 10m (0m pre-vid) **Cumulative Time: 2 hours**

ACTIONS

☐ **SHOW** up to this slide →

☐ **READ** section **GOAL**: "*My goal for this section is to _____*"
(e.g., "*help you to leave this session retain the information you've been learning. By reflecting on it, clarifying it, practicing it, and sharing it over and over, you're likely to remember, own, and apply what you've learned.*")

☐ **READ** **about bullet points** (sharing bullet points below is optional but recommended when time allows)

- People don't sustain real or lasting change without discussing what is newly learned
- Committing to sharing at least some of your *ah-ha's, barriers* and *next steps* is crucial to long-term retentions.

☐ **ASK** the following questions. Have <u>EVERYONE</u> share <u>briefly</u>*:

1. **One new idea or ah-ha gained from this session that was not fully known or understood before it started.**
2. **One next step to apply something learned.** (This need not be related to their aha's)

☐ **FINAL WORD** (*Thank them sincerely in your own words!*)

NOTES

*If you run out of time by this section, assign the 2 questions to them to do sometime throughout the day and **email their answers to you**. This helps them retain what they learn.*