

# SUCCESSFUL LIFE STORY TRANSFORMATIONS

Using the **ROADMAP® System** to Change  
Mind, Brain, and Behavior



**DAVID KRUEGER, MD**  
EDITOR



## **SUCCESSFUL LIFE STORY TRANSFORMATIONS**

**Using the ROADMAP System to Change  
Mind, Brain, and Behavior**

Edited by  
David Krueger MD

Contributions by  
Licensed, Specialty-Certified  
New Life Story® Coaches,  
New Life Story® Wellness Coaches,  
and  
New Money Story® Mentors

# ***SUCCESSFUL LIFE STORY TRANSFORMATIONS***

## ***Using the ROADMAP System to Change Mind, Brain, and Behavior***

A MentorPath Publication. All rights reserved.

Copyright 2015 David Krueger, M.D.

No part of this publication may be reproduced, stored, or transmitted in any form or by any means, including electronic, mechanical, photocopying, recording, or otherwise, without written permission from the publisher.

For information, contact:

MentorPath Publications

1707 Post Oak Boulevard, Suite 145

Houston, Texas 77056

Cover Design: Rachel Lopez, R2C Design

Editorial Services: The Editorial Department, Tucson, Arizona

ISBN: 9781483540238

Printed in the United States of America.

Visit:

[www.MentorPath.com](http://www.MentorPath.com)

[www.NewMoneyStoryMentor.com](http://www.NewMoneyStoryMentor.com)

[www.MentorPath.com/training](http://www.MentorPath.com/training)

## **Contributors**

### **Carl Arrington**

Carl Arrington is a Certified New Life Story® Wellness Coach, a graduate of Coach University, and a certified executive and retirement coach. His focus is on personal, leadership, and spiritual coaching.

[carlarrington3@gmail.com](mailto:carlarrington3@gmail.com)

---

### **Ahalya Baguio**

Ahalya Baguio has been a mentor, coach, and spiritual teacher for over thirty years, focused on assisting others to their own self-mastery. Over the last forty-five years she has been a focused student of consciousness. She has studied with many teachers and masters and has been the senior student of her spiritual mentor for over thirty-one years. For the last thirty years she has been teaching human potential, yoga philosophy, Eastern occult doctrine, metaphysics, and shamanism throughout the United States and the Philippines. Ahalya hold a master's degree in transpersonal studies and is a Certified Spiritual Mentor from Atlantic University and a Licensed, Specialty-Certified New Life Story® Mentor Coach. Her life is committed to her journey of personal evolution and to assisting others on their journey to self-mastery.

Self-Mastery Mentor Coaching™

[www.Ahalyarunningdeer.com](http://www.Ahalyarunningdeer.com)

[Ahalya@ahalyarunningdeer.com](mailto:Ahalya@ahalyarunningdeer.com)

(845) 417-6703

---

### **Janet Barr**

Janet Barr, M.S., ChFC, CLU, is an LPL registered principal and has

served as an independent wealth manager for over twenty years. President and CEO of Collaborative Financial Solutions in Santa Barbara, she specializes in investment management and behavioral finance, estate planning, and divorce settlement planning. Securities are offered through LPL Financial, member FINRA/SIPC; investment advice is offered through Independent Financial Partners (IFP), an SEC-registered investment advisor. (Collaborative Financial Solutions and IFP are separate entities from LPL Financial.) Janet has been published in *FinancialPlanning* magazine, *InvestmentNews*, and *InsuranceNewsNet* magazine.

(805) 965-0101

Janet@JanetBarrCFS.com

www.JanetBarrCFS.com

---

### **Diane Blasco**

I found the New Money Story® Mentor Training extremely interesting and useful in understanding and altering my own story and guiding others in Mentor Coaching.

My prior business experience has been as an Account Manager for companies such as Xerox, and ADP as well as a smaller family owned supply business. I have experience in Strategic Planning, Team Building, Financial Management, Project Management, and Human Resources. Additionally, I have built and renovated homes, commercial buildings, and spaces in the New York Metropolitan area. My educational background has been a combination of business (finance) and interior design. I enjoy challenges, problem solving, and facilitating change for others.

[diane.blasco@gmail.com](mailto:diane.blasco@gmail.com)

---

### **Lisa-Marie Cabrelli**

Lisa-Marie Cabrelli is a certified life and business coach specializing in location, independent business development, and lifestyle design. She lives

what she teaches and can be found running her three businesses from the road —either in Jacksonville, FL; Nassau, Bahamas; or Borgo Val Di Taro, Italy.  
<http://www.laptoplifelisa.com>

---

## **Carol Cueroni**

Carol Cueroni's specialty is transformation coaching as you create your new life story in life and wellness, mind, body, and soul. Her career spans extensive retail management experience in addition to twenty years as principal (until 2011) with PTE, Inc., doing business as Nick Cerio's Martial Arts Training Centers. A principal with CMC Consultant Group, in 2013 she became a Certified Life Coach, Coach Training Alliance, and a Certified New Life Story® Coach through MentorPath®.

[Carol@LivingYourLifeStory.com](mailto:Carol@LivingYourLifeStory.com)

[Carol@CarolCueroni.com](mailto:Carol@CarolCueroni.com)

[www.LivingYourLifeStory.com](http://www.LivingYourLifeStory.com)

[www.CarolCueroni.com](http://www.CarolCueroni.com)

---

## **Deb Dedrick**

A successful entrepreneur for thirty years, Deb Dedrick is experienced in all arenas of business management and ownership. She has simultaneously managed four corporations, while caring for her family. A Coach Training Alliance coach and New Money Story® Mentor, she believes a happy life requires creating balance in states of mind mental, physical, spiritual, financial, and social. She teaches people to create this balance so they can lead happy lives both personally and professionally.

[www.debdedrick.com](http://www.debdedrick.com)

---

## **Sue Gattenby**

Sue Gattenby is a business coach and CEO of The Gattenby Group, a company focused on advancing professional careers through the use of coaching and cutting-edge techniques. She is a certified coach and member of the International Coaching Federation.

[sue@gattenbygroup.com](mailto:sue@gattenbygroup.com)

[www.gattenbygroup.com](http://www.gattenbygroup.com)

(608) 798-4878

---

### **Rosalie D. Gibbons**

Rosalie Gibbons has been a licensed marriage and family therapist in California for more than thirty years. She is certified as a Hartman Color Code trainer and as a New Life Story Wellness® Coach. She is also a supervisor and trainer for Orange County Social Services Agency's training and career development. Ms. Gibbons is co-author of *The Wisdom in Re ... Rethinking Your Life!*, a GPS guide for reinventing oneself based on principles and practices offered in the leadership courses she facilitates through Leadership Education Action Programs (LEAP) and the nonprofit 501(c)(3) organization CARTE–Child Abuse Resolved through Education.

[Rosalie.Gibbons@ssa.ocgov.com](mailto:Rosalie.Gibbons@ssa.ocgov.com)

---

### **Karen Hamilton**

Karen Hamilton, RN, M.Ed., BC-HN, is an educator, writer, wellness coach, and parenting expert. She graduated from Boston Children's Hospital School of Nursing, Antioch Graduate School, and the Birchtree Center and holds expert-level board certification in holistic nursing. Her writing has been used to address modeling and role-modeling theory at the American Holistic Nurses National Conference, and she is recognized as a home education expert.

Karen and her former dog Lucy were a registered therapy animal team with Pet Partners. Ms. Hamilton has also been actively involved with the

R.E.A.D (Reading Education Assistance Dogs) Program. She is developing a coaching practice as the Hopesmith—one who forges hope. Her most meaningful accomplishment has been parenting her five children. She also loves seven grandchildren.

[kachamilton@gmail.com](mailto:kachamilton@gmail.com)

---

## **Cheryl Hiebert**

Cheryl Hiebert is a certified wellness coach and personal growth expert who cares deeply about the progress and healing of her clients and students. Her passion and enthusiasm for what she terms her bliss is exemplified in a wide array of personal sessions, workshops, and retreats.

With a mind-body-spirit approach, she feels strongly that those who come to her can build a repertoire of skills to heal, move forward, and feel truly on path in their lives. As a speaker and author she shares her wisdom and teachings with a broader audience through her books, writing for several publications, and as an expert for several wellness panels, blogs, and websites.

As a coaches' coach she guides, trains, and mentors coaches worldwide. As an Authentic Leadership™ facilitator she provides training to individuals, groups, and organizations. As an animal lover she devotes time and fundraising assistance to Sandy Pines Wildlife Centre and Gilda's Club Southeastern Ontario.

Cheryl lives her life with passion and purpose and, by example, leads others to do the same. A daily dose of her inspiring wellness tips is available on her Sacred Journeys Healing Arts Centre Facebook page or by signing up for her weekly e-zine through the website listed below.

[www.sacred-journeys.ca](http://www.sacred-journeys.ca)

[www.cherylhiebert.com](http://www.cherylhiebert.com)

---

## **Michael Huber**



Michael Huber is a robust, dynamic individual specializing in wellness who has acquired wellness coaching experience on many platforms: as personal trainer, international athlete, mental-health practitioner/clinician, and international business leader. Through tutelage and experience Michael has attained wealth, harmony, and an unrelenting desire to help others. Michael is tertiary (postgraduate) educated, Licensed and Specialty-Certified through the New Life Story® Coaching Program, and holds passports from Australia, Great Britain, Switzerland, and the United States.

Michael Huber, Inc.

(407) 360-1028

[mikehuber2@gmail.com](mailto:mikehuber2@gmail.com)

---

### **Sharon Jentzer**

Sharon Jentzer, CAPT USN (Ret.), M.B.A., DHED (ABD), RYT 200, is the founder of Jentzer Wellness Institute, LLC. She is certified as a Life Coach with Coach Training Alliance, a Specialty-Certified New Life Story® Coach, and a Yoga Alliance registered yoga teacher. She gardens, sails, dives, coaches, and teaches from her base in the Washington, DC, area.

[www.jentzer.com](http://www.jentzer.com)

[sharon@jentzer.com](mailto:sharon@jentzer.com)

---

### **Alicia Boyd Johnston**

Through Momentum Wellness, Alicia Boyd Johnston provides coaching towards wellness in all areas of life, helping those with serious or chronic illness or injuries to live their best lives possible and helping those going through major life transitions to navigate changes without losing identity or compromising self-care. Areas of interest include life purpose, wellness, relationships, and general self-care.

[aliciaboydjohnston@momentumwellness.ca](mailto:aliciaboydjohnston@momentumwellness.ca)

---

## **David Krueger MD**

David Krueger, M.D. is an Executive Mentor Coach, and CEO of MentorPath®, an executive coaching, training, publishing, and wellness firm. His approach integrates the insights of psychology, neuroscience, and quantum physics with strategic coaching to help professionals successfully write the next chapter of their business stories. Author of 17 trade and professional books on success, wellness, money, and self-development, and seventy-five scientific papers, his coaching and writing focus on the art and science of success strategies: mind over matters. His most recent book, *The Secret Language of Money* (McGraw Hill) is a Business Bestseller translated into 10 languages. He is Founder and Director of the Licensed, Specialty-Certified New Life Story® Coaches, and New Money Story® Mentor Training.

[www.MentorPath.com](http://www.MentorPath.com)

[www.MentorPath.com/Corporate](http://www.MentorPath.com/Corporate)

[www.NeuroMentor.com](http://www.NeuroMentor.com)

[dkrueger@mentorpath.com](mailto:dkrueger@mentorpath.com)

---

## **Marlene Lariviere**

Marlene Lariviere, M.B.A., is an executive mentor coach and CEO of Mentor Inspiration who works with leaders and other professionals to develop their strengths, identify self-limiting mindsets, and develop new behaviors and skills to achieve their goals. Over thirty years of experience and expertise honed in senior executive positions coupled with her rigorous coach training allows Marlene to deliver results-based coaching to her individual and organizational clients in the corporate, governmental, and not-for-profit sectors.

Marlene earned her M.B.A. from the University of Montreal-HEC and is

certified as a New Life Story® Coach by Dr. David Krueger, MentorPath®, and as an Immunity to Change Coach by Dr. Robert Kegan and Dr. Lisa Lahey, Minds at Work, Harvard University. She lives in Montreal, Quebec, Canada.

[marlene@mentorinspiration.com](mailto:marlene@mentorinspiration.com)

---

### **Gloria Manchester**

Gloria Manchester, CTACC, is president of Leadership Education Action Programs (LEAP). She coaches and facilitates its various personal growth programs. She is certified as a life coach, in nutrition/weight and emotional intelligence, and a trainer for Hartman Color Code. Gloria is also a Licensed, Specialty-Certified New Life Story® Coach. She is the co-author of an Amazon bestseller, *The Wisdom in RE ... Rethinking Your Life*, and co-founder of the nonprofit CARTE, a 501(c) (3) that provides STARR Project Teen-Esteem for at-risk teen girls.

[www.leaptoexcellence.com](http://www.leaptoexcellence.com)

(800) 606-4227

---

### **Lisa Manyoky**

Lisa Manyoky of You On You, an impression-management and brand-building practice, helps professionals understand what they put out there, fix their message if it needs fixing, make it louder if the world needs to hear it, and inspire good habits.

[lisa@youonyou.com](mailto:lisa@youonyou.com)

[www.youonyou.com](http://www.youonyou.com)

---

### **Francesca Marchegiano**

Expert in the definition and narration of personal and professional identities, Francesca Marchegiano provides training in storytelling skills. She is a consultant in autobiographical orientational paths, outplacement, and

personal brand definition. She is a writer for theatre and narrative and teaches autobiographical and therapeutic storytelling in agencies providing healthcare and social services.

[www.francescamarchegiano.com](http://www.francescamarchegiano.com)

---

### **Mirabai Marquardt**

Mirabai Marquardt's passion is to effect healing, transformation, and personal evolution in others, through integration of the mind- body-spirit connection. In service to humanity, Mirabai relentlessly pursues her own path of self-mastery. She holds certifications as a professional coach, hypnotherapist, yoga nidra facilitator, shamanic practitioner, and natural health professional.

[mirabaiwellness.com](http://mirabaiwellness.com)

[mirabaiwellness@gmail.com](mailto:mirabaiwellness@gmail.com)

---

### **Lynn Marysh**

Lynn Marysh, of Ontario, Canada, is CEO of Your Road Map, specializes in helping people through transitions. Both the New Life Story® Coaching Program and New Money Story® Mentor Training with David Krueger, M.D., of MentorPath® increased Lynn's effectiveness as a coach, bringing about lasting change in her own life as well as the lives of her clients.

[www.YourRoadMap.ca](http://www.YourRoadMap.ca)

---

### **Kay McConney**

Kay McConney is an executive coach, training specialist, and management and development consultant. She's also the chief executive mind of the training, coaching, and consulting firm The Executive Minds, Inc.

[www.theexecutiveminds.com](http://www.theexecutiveminds.com)

### **Sahaja McGuigan**

Sahaja McGuigan, RN, B.S.N., is a spiritual leader and teacher. Her life mission is that of a servant-leader facilitating awakening of our innate divinity. She believes that our life is one of abundance in the areas of health, prosperity, purpose (significance), and passion. As the great Patanjali wrote, “When you are inspired by some great purpose, some extraordinary project, all your thoughts break their bonds: Your mind transcends limitations, your consciousness expands in every direction, and you find yourself in a new, great, and wonderful world. Dormant forces, faculties and talents become alive, and you discover yourself to be a greater person by far than you ever dreamed yourself to be.”

(845) 282-1339

[SahajaWellness@gmail.com](mailto:SahajaWellness@gmail.com)

---

### **Jaymie Meyer**

Jaymie Meyer, CWP and New Life Story® Coach, is a wellness expert specializing in stress management, therapeutic yoga, Ayurveda, and HeartMath®. Enlisting ancient wisdom and modern science, Jaymie inspires people to create a lasting road map for wellbeing. She works onsite and virtually with private clients and groups.

[www.ResilienceForLife.com](http://www.ResilienceForLife.com)

---

### **Cathie Rodgers**

Cathie Rodgers is a professional businesswoman, life coach, Certified New Life Story® Wellness Coach, and Certified Grief Recovery Specialist®.

[cathie.rodgers1@gmail.com](mailto:cathie.rodgers1@gmail.com)

---

### **Jana Sedlakova**

Jana Sedlakova, founder of You Successful You coaching services, helps her clients unlock their true potential in life, change their beliefs, behavior, and performance, and set themselves up for a successful future. Some of Jana's areas of expertise are managing difficult personal and professional relationships, overcoming stress and adopting healthy lifestyles, business coaching, and starting successful businesses. She is designing a children's educational program to help set them on a solid path towards a successful future.

[jana@yousuccessfullyou.com](mailto:jana@yousuccessfullyou.com)

[www.yousuccessfullyou.com](http://www.yousuccessfullyou.com)

---

### **Katie Snapp**

Katie Snapp is an expert in leading women through professional development and self-management effectiveness. She is the author of two books, [\*Skirt Strategies: 249 Success Tips for Women in Leadership\*](#), and the upcoming *Brave Transition: A Woman's Composure through Shifts in Work and Life*.

Katie holds a bachelor's degree in electrical engineering, is a Six Sigma Green Belt, and Licensed and Specialty-Certified in New Life Story® Coaching Program in the psychology and neuroscience of leadership. She also teaches management courses at the Anderson School of Management at the University of New Mexico.

[www.SkirtStrategies.com](http://www.SkirtStrategies.com)

[katie@SkirtStrategies.com](mailto:katie@SkirtStrategies.com)

---

### **Mary Beth Stolte**

Through LLB Coaching International, Mary Beth Stolte instills in people the foundations of success reinforced with positive energy by teaching principles, strategies, and fundamentals that will empower them to adapt, improve, and thrive in today's ever-changing world, using tools and techniques to create the results they seek in life by taking ownership of their choices.

[marybeth@llbcoaching.com](mailto:marybeth@llbcoaching.com)

## **Jennifer Turner**

Jennifer Turner is a Certified New Life Story® Coach for leadership, business, and latescence, and CEO of Voice of Wisdom Transformational Firm, an organization tailored to the needs of executives, leaders, and businesspeople. She is the founder and pastor of Tabernacle of Peace ministries and Shepard-to-Shepard Ministries built for mentoring, training, and equipping spiritual leaders to succeed while leading for success. Jennifer has executive training in leadership and community development and is a graduate both of Beulah Heights University and Coaching Leadership Academy, trained by Ted McGrath. As a former educator and business owner for Shiloh Home Health Care, Inc., she has skills in administration as well as conflict resolution. She has also studied emotional intelligence, the neuroscience of change, mastering transitions, coaching groups, and relations coaching.

[shilohhc@yahoo.com](mailto:shilohhc@yahoo.com)

---

## **Aaron T. Walker**

A successful businessman and life coach, Aaron T. Walker is an inspirational, qualified leader with an entrepreneurial spirit. Ownership of eight lucrative businesses and participation in civic, philanthropic, and mentorship programs have greatly broadened Aaron's perspective on business and life, as he believes that continuing to learn and grow in every area is vital to achievement.

Aaron values his time spent with family and friends. Sharing the past thirty-four years with his lovely wife Robin has been nothing short of spectacular. His two fantastic daughters and champion sons-in-law have given Aaron and Robin four beautiful grandchildren. When time allows, Aaron enjoys hunting, fishing, and golf. The local church is where Aaron finds purpose and spiritual fulfillment, serving as a teacher, deacon, and leader.

View from the Top

[aaron@viewfromthetop.com](mailto:aaron@viewfromthetop.com)

[www.viewfromthetop.com](http://www.viewfromthetop.com)

---

## **Phillipa Wilson**

Phillipa Wilson has been a registered nurse for more than thirty-nine years. She has had adversities, yet bounced back stronger and wiser. She has worked in varied areas overseas, the Caribbean, and here in the United States. Phillipa is a Specialty-Certified New Life Story® Wellness Coach integrating neuroscience, positive psychology, and quantum physics with strategic coaching. She is also a certified social + emotional intelligence coach and holds a master's certificate in metaphysical studies. Her passion is helping people find their inner power and develop their potential to live their best life. She is the owner of Live–Well Now, LLC.

[phillipawilson@msn.com](mailto:phillipawilson@msn.com)

---

## **Heath Van Fleet**

Heath Van Fleet is the founder of Balanced Possibilities coaching. He specializes in life, leadership, and wellness coaching. After spending the last seventeen years in the manufacturing industry at Procter & Gamble in training and leadership development, he branched off into coaching using his experience to help leaders balance life, wellness, and success to deliver greatness.

[www.BalancedPossibilities.com](http://www.BalancedPossibilities.com)

[vanfleetnh@balancedpossibilities.com](mailto:vanfleetnh@balancedpossibilities.com)

---



## **Table of Contents**

Preface

Introduction

I. Money Story® ROADMAP

New Money Story® ROADMAP Case Studies

II. New Career Story®

New Career Story® ROADMAP Case Studies

III. New Wellness Story®

New Wellness Story® ROADMAP Case Studies

IV. New Relationship Story®

New Relationship Story® ROADMAP Case  
Studies

V. New Life Story®

New Life Story® ROADMAP Case Studies

# SUCCESSFUL LIFE STORY TRANSFORMATIONS

## Using the ROADMAP System to Change Mind, Brain, and Behavior

### Preface

I have been impressed with the required writing of a ROADMAP Case Study by the professionals who have trained with me as New Money Story® Mentors and New Life Story® Coaches. The subjects of their case write-ups have been either themselves or clients, and their presentations have been so illuminating that I believe others can benefit from a compilation of some of them. All the Mentor Coaches have indicated how useful and integrative the case studies were, either for themselves as the ROADMAP subjects, or for their clients, and how much they enjoyed putting it together. Each case study demonstrates and extends the benefit of applying the understanding and principles of the ROADMAP System.

During her training as a New Life Story® Wellness Coach, Tisha Ford had the epiphany described below, which serves as a fitting preface to the case studies you are about to read.

I had an interesting experience last evening that bubbled into an early morning insight I wanted to share with you. Yesterday I began yoga therapy training. As a form of introduction, attendees were paired up and instructed to interview one another using a specific series of questions about our personal and professional lives.

We then regrouped as a class for each of us to share the partner's answers to the questions. The array of emotions emerging for me during this process brought home with great clarity that they stemmed from my attachment to my story and from bearing witness to another speaking my story. Hearing my own story and my life interpreted and communicated through the lens of my partner's own story and predilections felt to me like a lack of control. That was when I realized *it truly is just a story*.

My partner's story of me is just as valid for her as my story of me is for me. And in that moment the Buddhist principle of non-attachment manifested its wisdom: in order for me to truly embody the power of story as story—a creative, living, breathing form of expression, constantly in flux and ready to be transformed and to evolve—I must truly let go of the

notion of my story as fixed, finite, and *only*.

Through this exercise, I recognized more than ever the power of story, of our attachment to our own stories. It became clear to me, by hearing another's version of my story, that persistent attachment to our own stories can limit us from embracing the beauty of story's creative, ever-changing energy. If we allow our stories to evolve, to suit our own needs and desires, that evolution will be the key to becoming fully realized persons.

The case summaries in this book are from professional Mentor Coaches whom I have trained as Licensed, Specialty-Certified New Life Story® Coaches and New Money Story® Mentors. This Mentor Coaching system integrates psychology, neuroscience, and behavioral economics with strategic coaching to transform mind, brain, and behavior. Unique in its scope and depth, it incorporates the art and neuroscience of creating changes that last.

Along with successful changes of behavior, the choice architecture also entails underlying revisions of mind software and brain hardware. We help our clients create essential changes of life, money, career, relationship, wellness, and business stories that can make a difference for a lifetime.

This compilation of ROADMAP Case Studies submitted by Licensed, Specialty-Certified New Life Story® Coaches and New Money Story® Mentors both illustrates the work that they do in Mentor Coaching and is a contribution in its own right.

David Krueger, M.D.

CEO, MentorPath®

Founder and Director, New Money Story® Mentor Training  
and New Life Story® Coaches Training

New Money Story® Mentor Training  
[www.NewMoneyStoryMentor.com](http://www.NewMoneyStoryMentor.com)

New Life Story® Wellness Coaches Training  
[www.MentorPath.com/training](http://www.MentorPath.com/training)

## Introduction

### The Power of Story

The power of story in our lives is ubiquitous. Our brains are wired to create stories; our brains need a story in order to understand, relate, and remember.

The desire for meaningful patterns translates into a search for a story. We are a storytelling animal. Our brains have a natural affinity for seeking narratives, learning from them, and creating them. Writer James Wallis put it simply: “In the same way that your mind sees an abstract pattern and resolves it into a face, your imagination sees a pattern of events and resolves it into a story.”

Our storytelling mind automatically begins to weave various facts, observations, and experiences into a story. This synthesis both makes things make sense and counters the discomfort of not knowing.

*Plot is the structure, purpose, and pattern of a story.*

A life story is the outline of life narratives. The core assumptions of life stories inform what we look for and how we attribute meaning to what we experience. Behavioral patterns and belief systems downloaded from parents and significant others in the first years of life become automatic models, operating thereafter without observation or awareness. Neuroscientists estimate that 90-95% of our behaviors and core beliefs is preprogrammed in the unconscious mind, operating on autopilot. We observe beliefs and models only indirectly, often through resulting behaviors and attachment patterns.

We may then create two stories simultaneously: *the surface story* and *the shadow story*.

According to the surface story, we run our lives with conscious intentions and aspirations: “This is what I want from life.” “These are my positive aspirations.” “I want to make more money and generate wealth.”

Yet at times the shadow story ghostwrites behaviors that oppose conscious intention: “I can’t get what I want.” “I don’t have what it takes.” “I was not meant to be wealthy.”

*We learn through stories.*

Stories are how we understand and how we remember. James Watson, the researcher who with Crick discovered DNA, said, “You know, I can remember

something when I fit it into a story.” A story is a system for holding facts together. A story makes things make sense. As Muriel Rukeyser has observed, “The world is made up of stories, not atoms.”

We personify the economy, or the stock market, as if each were its own story. We make a story out of events in order to infer relationship and assign causality.

*Each of us has a personal story with a plot and storylines.*

Our beliefs and assumptions ghostwrite that story. From an infinite sea of possibilities, our software determines what we perceive and process. Since the brain needs a story and will infer one, it’s helpful to know the lexicon.

Our plot comprises our core beliefs and assumptions, which transform all the information available to us into a system that makes sense. We then create life narratives according to that plot, since mind and brain are both programmed to process by the default mode and to ignore facts that contradict our built-in assumptions.

*A life story contains silent assumptions and emotional scripts.*

Our assumptions tell us what to look for, how to perceive and process experiences. Some of our beliefs and patterns may be invisible to even to ourselves. Gregory Maguire, a bestselling novelist and playwright (most recently of the Broadway hit *Wicked*), commented in an interview, “I didn’t even realize this at first, but there’s almost no central character in any of my 24 books who doesn’t have a dead mother or a lost parent.” Maguire’s mother died from complications of giving birth to him. After his twenty-third book he finally became conscious of that fact’s import in his work: “I can’t seem to start a novel unless the character doesn’t have a mother. If the mother is still alive—if the mother was still there—what’s the problem? There’s nothing to write about.”

*We believe and remember only that which fits our plot.*

What we expect to happen in the present instantly reveals our past experience. Psychoanalysts call this transference. Someone abandoned early in life will expect more of the same in future relationships, even though circumstances change. All subsequent information is absorbed, filtered, and organized by that narrative plot.

Our expectations help us to see. Moreover, they *determine what* we see.

They may also blind us to what we aren't looking for.

A professor fond of telling stories will ask his class near the end of the period if they have time to hear a story before they leave. They look at their watches and inevitably say yes. When he immediately asks them what time it is, they have to look at their watches again. This is completely understandable, because their frame of reference for the initial check of their watches was how much time remained, not what time it was. The first time they looked, they wanted to know if there was enough time left before the class ended. If we look for one thing, we may miss another.

*We don't see things as they are—we see things as we are.*

We see what we believe. And we're always right—because we write the story. Two anthropologists were chosen to enter separate, essentially identical ape colonies where they would live and observe for a year. They had remarkable similarities of personality, philosophy, and education.

When the two anthropologists emerged to compare notes, they expected essential similarities but instead found remarkable discrepancies. One anthropologist, after an initial period of transition, was accepted by the apes, integrated into the colony, and achieved unity and comfort with them. The other anthropologist never got beyond the social periphery of his colony, remained careful and vigilant, always seemed on the cusp of a conflict, and never reached harmony with the apes.

The anthropologists could not understand the discrepant results, or find any reasons. They puzzled for months until they finally found the one difference. The anthropologist who was the uncomfortable, careful outsider carried a gun. His gun never showed, he never used it, and the apes never knew he had it. But he knew he had it. He knew that if things got tough, he had an out. On the other hand, the anthropologist who had no gun had a commitment. He knew from the beginning that he would either make it—or not—on his own.

In retrospect and reconstruction, it was clear that both men's assumptions created the reality they experienced.

We tell our story, then our story tells us.

*A story can define possibility.*

Over centuries of recorded time no one had run the mile in under four minutes. Received wisdom had it that a four-minute mile was impossible. Yet

after Dr. Roger Bannister broke the four-minute mile in 1954, in the next eighteen months a dozen other runners also broke the four-minute mile. The obstacle of the impossible no longer existed. Today it is commonplace for runners to match that feat. Once the mindset of what is possible changes, reality changes as well.

*A story can define reality.*

A placebo generates the effect of the accompanying story. A patient is prescribed an inert pill + some expectations (a story). In the majority of cases, the story becomes the reality. By anticipating an experience, one can create it.

The story generates a truth so powerful that it can even *reverse* the pharmacological effect of a real medicine. The placebo is a white lie, a fiction that becomes a truth. A recent MIT study showed that a more expensive placebo worked significantly better than a much cheaper one (same placebo, different stories).

And this isn't about being gullible or suggestible. For example, when a patient believes something will reduce pain, the body releases endorphins. Medical research suggests that the success of up to 70% of nonsurgical treatments is the result of the patient's and physician's belief that the treatment will work.

*A story can take over the author.*

"My anger took over." "My fear stopped me." A feeling that someone creates is perceived to *act on* its creator.

We may even see ourselves as the *victim* of the stories we create rather than as their *author*: "My doubt paralyzed me." "My work eroded my free time."

We ascribe a story with a mind of its own to our *own* creations.

Here's another example of the power of story. A woman I know recalled an incident from her adolescence, when she was attending a Catholic all-girl boarding school. "At one party," she said, "I started a rumor that the punch was spiked, and everyone got drunk."

*Our lives are self-statements, the manifestations of what exists inside us.*

The things people say and do are inevitable, unavoidable self-statements of their beliefs and personal realities. All that you say and do is about yourself. What you say about me tells me about you. Everyone is always making self-

statements, so don't take it personally!

You define yourself. Other people's definitions of you are more about themselves: to make themselves feel better, what they want or don't want to own, what they disavow or project. You can never hit your own stride if you're running someone else's race.

A client is always showing you exactly what it's like to be him or her. If you think about it in that way, rather than, for example, viewing some behavior or comment as resistance, it can help you understand how to engage.

*When we change the way we look at things, the things we look at change.*

Neuroscience shows that pure facts are a myth, and quantum physics seconds the motion. This observation came originally from quantum physics and the process of observing quarks.

*An authentic belief in someone activates that person's brain to create a state of mind that transcends usual thinking and performance.*

Neuroscience recently demonstrated this principle, even though good parents have known it for centuries.

## **The Art and Science of Change, Reinvention, and Success**

When people construct their personal narratives, important elements often remain invisible, along with beliefs that ghostwrite behaviors. Unlike other narratives, a personal narrative is not announced directly. The narrator may not recognize the real the story he or she is living and can even believe it's different from the story others perceive.

The case studies included here illustrate a method for identifying personal stories and bringing about systematic change. Basic to this method is the personal requirement to have a new story to be in before the old story can be given up. The vignettes illustrate both change from compromising past storylines and reinvention of present successful stories. The principles and strategies of actively authoring change bring new dimensions of personal, career, relationship, and financial success.

Many prescriptions for change ignite discomfort with the old story or even resolve an old story as a way of coming to the end of the past, yet they fail to offer ways to develop a successful new story. Insights, understanding, even coming to the end of the past and ending an old story are not enough to create a new story. The process of change itself must be addressed in an



informed and systematic way.

The approach illustrated here integrates the dynamic insights of psychology and neuroscience with the principles of strategic coaching to generate a new story. The new story calls for generating new experiences coupled with awakening hope, envisioning the future, and mobilizing talents and strengths to attain certain goals of personal and business growth.

Beliefs drive behavior. Behavior drives performance. Changing your mind changes your brain and your life.

The ROADMAP process systematically informs active listening and understanding of the participant's own story. Beyond that, it provides structure and strategies to guide the evolution of a participant's unique voice as he or she writes and revises a new story.

The ROADMAP (acronym for the seven steps in the creation of a new story) is a structured process by which participants deconstruct an old story and systematically construct a new or revised one. No matter whether the story has to do with life, money, relationships, career, wellness, or business, this structured process serves as a guide to transformation.

We employ the following seven steps of the ROADMAP program as an effective means to clients' significant life change:

**Recognize** the authorship of your life story

**Own** your present story

**Assess** the storylines 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

These vignettes and case studies illuminate the hidden agendas, beliefs, habits, and assumptions that ghostwrite limiting stories, along with the insight and mutual work that generated a new story of hard work miracles.

*It is never too late to become what you might have been, or too soon to become who you want to be.*

## **12 Basic Principles of Change and Transformation**

### **1. Awareness of your plot and storylines.**

The beginning of change is to recognize being the author of your story. If there is a personally created problem, barrier, or obstacle, the challenge is not

to get over it, push through it, or adapt to it. It is not there until you create it. Consider the possibility of not creating it and creating something else instead.

2. Assess the storylines that work and those that do not work.

In order to change, you first have to know what you want to change, and what you want to create instead in each aspect of your life: career, ideals, personal life, functioning at full capacity, happiness, relationships, finances. The bottom line, no matter how entrenched the process or how strong the hope, is “Does it work?”

3. Recognize passive vs. active positions.

Active: You are the author, the casting agent, and the director of your story.

Passive: The cause is fate, luck, or destiny; assuming you’re the victim of the feeling (which you create), as “I got butterflies in my stomach,” or “My fear took over.”

4. Listen to your language—it speaks your assumptions.

Words reveal an internal model.

Pressure words (should, have to, ought to) reveal your perception that there’s some external point of reference and authority rather than an internal one.

Passive language (“The thought occurred to me,” “My anger got the best of me,” “It just happened”) indicates your perception of yourself as the subject rather than the initiator of action.

Limitation words (impossible, can’t, shouldn’t) reveal your perception of constraint and limitation.

5. Address resistance to change and repetition of the old story.

Repetition ensures predictability. We repeat behavior that doesn’t work because it offers familiarity. Doing the same thing produces a known outcome. We sometimes mistake predictability for effectiveness.

Yet there is no future in repetition. Any departure from the familiar, even a positive one, creates anxiety and uncertainty. You have to have a new story to be in before you can give up the old story.

6. Take ownership of your story to become your own authority.

Reinvention begins with taking ownership of what you do, and what you do about what happens next, rather than living out what just seems to happen, or feeling victimized by forces beyond your control.

7. Decide what you want to change.

Your life is the manifestation of your beliefs. Old beliefs do not generate

new ideas. Changing your mind changes your life, as beliefs, goals, and visions drive action. Choose carefully what you engage.

8. Excitement and fear are the same feeling, just viewed and experienced differently. Excitement counters anxiety when your mission is stronger than your fear.

9. Construct a map to determine where you are.

Without a map to determine where you are, it's difficult to proceed with an organized and successful story (life, career, relationship, investment, etc.). With a map, you can see where you are, how far you've come, and how far you need to go to reach your goals.

10. Decide where you want to go.

Having a map allows you to filter distractions, determine the route, and discern what is tangent or detour. Distinguishing between what you want to achieve, preserve, and avoid is an ongoing process.

11. Figure out how to get there.

Create a game plan of realistic, attainable goals with measurable results.

12. Stick to the plan.

It is never too late to become what you might have been, or too soon to become who you want to be.

## **I. MONEY STORY ROADMAPS**

Each of us has a money story, but we may not know how to tell it to ourselves to fully grasp it. The story seems to write itself, even to just happen. How do you “get” the money story you are creating each day? How do you understand the storylines of internal conversations about money, your personal history about money, hidden assumptions and emotional meanings, projections, money as mirror of self, how money is clothed in secrecy and taboo? Someone’s external goal may be financial freedom, yet an internal voice says, “I will never get out of credit-card debt.” Thoughts, actions, and words all have to go in the same direction to produce success.

We interpret money. It has no meaning until we give it one, no power until we bestow it. We interact with money, have a relationship with it, speak with it, and have it speak for us. You can listen to your money conversations, even talk to yourself. Every statement you make about money has its own voice and is part of your personal money story. You make several statements about money, some of which may be opposing and contradictory. By listening to your language you can discover your money story. By uncovering the assumptions and conflicts, you can consciously write and live the story you want.

Every person has a money story. No one can fully see it because of being in it. The story seems to write itself, to “just happen” or be “just the way it is.” Common storylines in each money story include internal conversations about money, hidden assumptions, emotional meanings, money as both mirror and projection screen, with some secrecy and taboo.

Our money stories are a large part of our life stories. Some money issues are really about money, but many are about other matters, private or even secret, hitchhiking on money. Money is simple, yet complicated where we’re concerned by its important emotional, unspoken, and unconscious aspects. We take money—the tool—way too seriously. If we took our money stories seriously enough, we’d recognize that we write them, live them, and can revise them. Getting it just right with money is hard. It may occupy too much of our lives, or too little. Its importance may inhabit too large a space, or too small.

Money is a Rorschach blot onto which we project various self-statements of personal meanings. The hope that more money will bring happiness raises the question of what “enough” is. Only with an endpoint of “good enough” can you know when you reach a goal. The process presupposes having a goal and a game plan about how to reach that goal.

Money is an idea as well as a fact. As a medium of exchange of goods and services, money's value can theoretically be distinguished from emotional and symbolic assignments. Money is also one of the most emotionally charged objects in contemporary life—an emblem of feelings, significance, and striving. Probably the other two vehicles on which so much hitchhikes emotionally are food and sex. Money's symbolic and realistic meanings are always important and probably inseparable, signally so in emotionally charged situations such as a marriage or certain professional or personal arenas.

Money was always intended to be a symbol, so it is a ready stand-in for personal meanings of what we idealize, want, fear we have too little of, feel we don't deserve, or can never have. Particular emotions such as fear and greed predominate in the money arena. Where money is concerned, strategies and game plans may be abandoned at times of excess stimulation—when things are going particularly poorly or especially well—so that bad investment decisions prevail. Money carries particular personal meanings for each of us from past experiences, social ideas, and our unique emotional development. Even in coming to know our personal myths and ourselves well, we may have omitted consideration of the personal complex meanings of money, the ways in which it affects our beliefs, behaviors, feelings, and relationships.

## **The Psychology of Money**

If we take the simple view of money as money, we soon see how much emotional complexity we attach to it. Each of us can imbue money with conscious and unconscious significance to represent power, security, self-worth, love, happiness, control, dirtiness, freedom, status, sexiness, worldliness, acceptance, and a host of other personal meanings. We may make it an icon of achievement, of immortality concretized and passed to succeeding generations. Our various symbolic representations and perception of money are influenced by cultural background, family values, developmental experiences, and emotional needs.

Although society adds some metaphors of its own, money symbolism is uniquely subjective. Money and meanings are woven into our personality from our life history, sensitivities, experiences, internal conflicts, emotional needs, and basic sense of self. Some of these symbolic meanings are outside the realm of intellect, reason, and logic. The symbolism of money may reside entirely in

our right forebrain, the emotional part, at times disconnected from the left forebrain, home of reason and logic.

Money issues can quickly spark ambition, insecurity, envy, fear, jealousy, competition, guilt, or any number of other emotional reactions. If someone is competitive, insecure, or prone to fantasize and worry, money is always a reliable and tangible focus, a yardstick of many measures.

Many emotional and relationship issues manifest vividly in the financial arena, focusing on money as the answer, the problem, the cause, or the result. Money may be the common language of success phobia, impulsivity, and even fear of autonomy, exemplified when someone repeatedly creates financial crises that require rescue. Symptoms of issues around money include compulsions to gamble, shop, or hoard. Money may become the currency of addictions in work, financial risk-taking, wealth acquisition, or impulsive spending.

We often make decisions based on emotion, and the particular personal meanings and significance we attach to money can be a built-in emotional tripwire for repetitive and limiting decisions.

The greater the degree by which money represents unfulfilled needs or wants, the greater will be its promise of happiness, however illusory that promise. The perpetual hope that more money will provide happiness requires a focus on what is “enough.” If we acquire more money, having assumed it would bring more security or freedom, we may find just the opposite. Or, we speculate, if we could have just the right amount of money, *then* we could do exactly what we *really* want to do and have exactly what we want. The “right amount” may be a specific figure, but if it’s a floating figure defined by “more,” it will perpetually elude us. As long as the amount of “enough” extends beyond what we can realize—say about double that amount—we may never have to confront our illusion.

Hope can be rolled into a “someday” fantasy, sometimes even given a numeric value. The person who believes he or she will finally be happy when that final ten pounds is lost may never lose them, to avoid confronting the illusion that happiness is only ten pounds away. For someone who is always one promotion short of happiness, how many promotions will it take to prompt

self-reflection?

In the end, a symbol is only a symbol. Once someone recognizes that what he or she thought would bring happiness does not, facing the illusion of the symbol can precipitate a serious, even crushing review of what money is and is not.

## **I. NEW MONEY STORY® ROADMAP CASE STUDIES**

### **My New Money Story®**

Deb Dedrick

My story starts in 1986, the year I got married. So happy to be married, I felt secure and fortunate to have married Steve. He was kind and adored me. I never had to worry about his love for me, or about other women—something that had caused me a lot of pain in past relationships. Loyal and kind, he was also generous.

He owned a transmission business, and money wasn't a problem for him. From the beginning, what was his became ours. Quickly I took over the finances, personal and professional. As I had no formal training, Steve's bookkeeper graciously trained me. Back then I didn't know a debit from a credit. A quick study, I found I enjoyed managing money, building and growing businesses. I was good at it. I loved the challenge. Over the next twenty-seven years we worked together building companies and creating new ones.

We started our family and soon had four kids—two boys and two girls. I was very busy, working between two offices—one at home and one at work. Having no need to leave my kids with a babysitter, I took them with me everywhere, including my office. This was a blessing. I was able to enjoy the best of two worlds: working, a successful entrepreneur, and enjoying being a stay-at-home mom. Steve was very busy at work himself, both during the day and at night. After a normal seven-to-five work day, he also spent most evenings working, building our commercial leasing company. He loved doing the prep dirt work and parts of the construction work himself. His long hours and hard work saved us a lot of money. But he was gone a lot, and I began to feel frustrated, lonely, and overworked.

As hard as Steve worked to save money, I worked just as hard spending it. Sadly, I don't remember a time in my life when I didn't love to shop. Still do. Most Sundays, Steve's only day off, I took my daughters shopping after church. In fact, I was very spoiled. Steve didn't like my shopping, considering it a waste of money. I ignored his complaints, justifying my bad habit, subconsciously telling myself I deserved it. This pattern of behavior was



disrespectful to Steve, and over time his resentment grew. We couldn't go out for our weekly date night without having an argument over money. I ignored the danger signs and the erosion of our relationship. Money became a silent wedge between us. Worse yet, in 1999 I discovered online stock trading. I am ashamed today to admit how much money I lost trading online. Eventually I quit, but not before my addiction further damaged my relationship with my husband.

In 2011 we filed for divorce.

The pain of our failed relationship, both personally and professionally, having to separate our business concerns and personal property, was devastating. Divorce has been a painful process, both for our children and the two of us.

My sadness led me to seek comfort. I read every book I could get my hands on, took courses seeking solutions. I wanted to learn from my mistakes. My road to enlightenment led me to Coaches Training Alliance. In 2011 I trained and became a Certified Life Coach. After I finished CTA certification, I went on to train further under my Mentor CTA Coach, Dave Krueger. I am now a Licensed New Life Story® Mentor and a Licensed New Money Story® Mentor.

Outlined below is my application of New Money Story® ROADMAP®. This step-by-step process teaches clients to identify problem behaviors, own them, choose differently, develop new habits and behaviors, and create lasting change.

### *Recognize authorship.*

I am starting over, without my ex-husband's income. I can no longer be nonchalant about money. Starting fresh, I am creating a new story, building new habits of earning, spending, saving, and investing. I have wasted money gambling in the stock market. I have spent money frivolously on clothes and shoes. I have not stuck to a budget (except in my businesses). I haven't set aside enough money daily, weekly, monthly, or yearly for my retirement. To keep things in perspective, financially I am secure. I have a small amount of credit-card debt, have put three kids through college, and in spite of my

divorce have a high net worth. I am committed to changing my easy-come, easy-go attitude about money.

*Own my story/habits.*

My accountability is a prerequisite for change. I acknowledge my high tolerance for risk taking and that I've been careless in the past, trading stocks. I didn't track my wins or my losses. I was greedy and thought I could beat the market. I refused to follow trading rules, though I knew them well. I have a weakness here. I'm aware that if I don't analyze and set clear goals for managing, monitoring, and measuring my progress, I will not accomplish my goal, which is to create a new money story.

*Assess the plot and storylines.*

I have recognized the behaviors, hidden messages, and elusive language of my mind and my emotions. I cannot trade stocks again without a plan. If I do allow myself to trade again, I will limit trading money to \$5,000 or less. I am not confident that I have the self-control needed to stay within the \$5,000 limit. My shopping and gardening purchases must be budgeted into my yearly and monthly budget with a specific dollar amount.

*Decide what to do.*

I will make mindful choices about the story components I plan to keep, let go, change, and enhance. I will set up a yearly budget, broken down by month. Included will be the maximum auto-pay I can contribute to my retirement fund. I will transfer my self-directed IRA to a certified financial planner. Specific amounts of my savings will be put in secure, interest-bearing accounts. I will pay down my mortgage to keep the payment manageable and secure a lower interest rate. My amortized house payment includes property taxes and insurance. I will use just two credit cards, one for personal expenses, one for business. My accountant will determine the amount of money to set aside monthly to pay income-tax estimates. I will set a net worth goal and build my budget and savings plan around the goal of increasing my net worth.

*Map changes.*

I have set concrete goals and success strategies, with milestones, actions steps, and timelines. I track all progress using an Excel spreadsheet. I use IBANK to link financial accounts. I use online bill pay to track spending. I monitor and measure all progress weekly.

*Author new experiences.*

I am creating the New Money Story® I desire. I have assessed my position and acknowledged my careless attitude about money management. I am sticking to a conservative budget that allows for some shopping. I do not trade stocks. I have an accountability partner who helps me remain focused on my end goal of financial stability.

*Programming new experiences and identity.*

Takes time, effort, and repetition. Refinancing my house, securing a lower interest rate, adding insurance and property taxes into the payment. Paying off credit-card debt, contributing to a retirement fund using auto-pay. Rather than trading myself, employing a fund manager to invest and grow money. Setting up a yearly budget allowing for some shopping. These measures have proven to be solid ways to recreate my money story. My story will have a happy ending, i.e., a secure retirement.

## **Addendum**

I've worked through my fear of being alone, taking responsibility for myself. Having ROADMAP to a New Money Story® etched in my memory allows rerouting the information highway of my brain. Taking new paths, I am erasing false limitations buried in my belief system, subconscious thoughts that held me hostage to my shadow story. Divorced, independent, and confident and positive, I am creating a new identity. Aware that sustaining the changes I've mapped out takes planning and persistence, I am accomplishing the goals I've set for myself and skipping happily down my new path.

## **Old and New Money Stories**

Gloria Manchester

### *Old story.*

When I was 12 years old, I saw the pain of my parents' almost losing their home and their business. The bank was prepared to come onto their property to auction off everything they owned. In the final hour, my brother-in-law put up the cash to save them. My parents were very hard workers; however, they spent more time and energy pinching pennies than they did making money. Perhaps that was the plight of the 1920s generation.

At some point, through all of this, I decided I never wanted to live that way, so I did the complete opposite. What I resisted, persisted. I made a lot of money and continuously spent more than I made. In the last few years I recognized this image of loss around money buried in my unconscious mind that had surfaced many times in my life. I certainly knew how to make money; I lost more than many people make in their lifetimes. It was painful and draining. This was my old story and I know, now, that I authored it, refined it, and repeated it.

### *Recognition.*

Once I got honest with myself and began to see my patterns of sabotage, I started to heal. It didn't happen instantly, though. I made a few bad choices, even after I realized I was re-enacting my parents' pain and losses. Coming out of the shadows of my spending addiction, I was over-confident in my ability to thrive. I still struggle, from time to time, with my shopping addiction. And, I'm sad to say, I'm watching my 43-year old daughter repeat some of my struggles. This holiday, with her coming from Switzerland, I have recognized her shopping addiction. She makes a lot of money in her career, as I did, and she spends a lot of money shopping. Before arriving with her husband and my grandchildren, she bought online and had all the packages sent to my house so my niece and I could wrap her gifts. Then I watched on Christmas morning as my grandchildren and everyone in the family became the recipients of her generosity. It was a rude awakening.

That's how Christmas had been for her and her brothers growing up. One year, we had dirt bikes and horse equipment under the tree that extended into the large entryway of our beautiful home. I spent it all and saved nothing. I had sabotaged myself over and over, and now I could see that I had passed on this unconscious negative value system to my precious daughter. Although it is her choice to change, I shared this story with her while she still has many assets and earning power. I am thankful she has a much more practical side than I did (which she gets from her father).

### *Assessment.*

Even with all my destructive habits, and at the age of 69, I still know how to make money. I have a great lifestyle, health/energy, travel, a nice home, and growing businesses. But I am 69 years old, and other than my home and a few thousand dollars in the bank, I have no hard assets. I have rheumatoid arthritis and a pacemaker, and I work sixty hours a week doing what I love. I think my life is rich. What will happen when my health deteriorates as I age? I have made no provisions other than my abilities to earn and Social Security because of my risky behavior. It's a hard pill to swallow.

### *What do I change?*

I need to value my time—get paid what I'm worth—and have more balance in my life. I am an excellent coach, but I often coach without charging. It's not because I'm afraid of asking for the money, I do it daily. I often get distracted taking care of my clients and continue coaching without clarifying the fees. I don't even have to market myself any more, as all my coaching is now by referral. To make changes, I have started keeping a log of coaching times for each client. I love the “now and next” phrase, learned from Dr. Krueger, for everything including my fees. I have a goal: to be debt-free by February 20, 2015. I will be 70, although you would never know it. I have \$280,000 in business debt outside of my mortgage.

I have been downsizing everything. Once I sell my house, I will move into my daughter's smaller rental house, which is in a fabulous neighborhood in Sacramento and close to their home when they return from Switzerland. It will be remodeled to suit my needs. Or, I will buy a loft in Sacramento Midtown, which is a trendy and exciting place to live for older adults.

When my own children were young, I was so busy making money I spent far too little time with them. I will be living close enough to take my grandchildren to school, tae kwon do, soccer, and dance classes. This is extremely meaningful to me. I will also be coaching groups and have at least two protégées coaching with me. I am already mentoring one who has completed the Coach Training Alliance program.

### *Map changes.*

Since Rose and I co-authored our book *The Wisdom in RE ... Rethinking Your Life*, it has opened up many doors. It's like a big calling card. I will start promoting the book more energetically, now that we have so much positive feedback it creates interest in all our work with women and teens. I'm also writing a children's book around my granddaughter Raegan, called *A Rae of Sunshine*. It's about building self-esteem, specifically in little girls ages five to nine. And Rose and I are writing an e-book for teens called *The Wisdom in Teens*. I'm increasing my coaching with teenage girls, and we're developing teen leaders through our STARR Project Teen-Esteem Courses in Pittsburgh and California.

I'm also launching a health and weight coaching audio program called H.E.A.L.S.—Health—Energy—Accountability—Lifestyle—Shifts, specifically designed for a woman between the ages of forty-five and seventy-five who is somewhat overweight and wants to improve her overall health, mind/body/spirit, by shifting her mindset and following a strategic plan for a healthier lifestyle. This is exciting for me, because after I was certified in weight coaching, I lost 15 pounds I had been carrying for years.

And last but certainly not least, I'm developing an application to take my financial services business to another level. It will be automated for use by small lenders and private investors to monitor funds for construction projects. I will take everything I know about successfully managing projects and make it all accessible in a computer application. Once my debt is paid off, this application will create passive income to last me the rest of my life. All these changes will transform my finances.

### *Author new experiences.*

I'm excited about the opportunities and possibilities for my future. Using the same tenacious determination that brought me to this stage in my life, I will overcome all barriers to success in making the rest of my life the best of my life. My legacy will be that I made a significant difference in many people's lives by my willingness to create my own New Money Story® and experience the abundance that followed. By example, that's teachable.

Doctor Krueger's programs *The Secret Language of Money* and *Live a New Life Story* have been a catalyst for change in my life, in these past few months, by playing out my own experiences using the ROADMAP®.

## **An Entrepreneur's Money Story**

Lisa Manyoky, CTACC

*Recognize authorship. You are writing your story: from assumptions to every choice.*

As far back as I can remember, members of my family—with an eye roll as they shook their heads—have always declared that “I march to the beat of my own drum.” They are quick to judge and criticize because my lifestyle as an entrepreneur is different from their more traditional choices. I now understand that my beat is as valid a rhythm as theirs. I regard their comment as a compliment, whether they intend it as one or not.

*Own your story. Accountability is a prerequisite to change.*

As I described one of my business ventures, I got defensive when my family's eyes first glazed over, then they chastised me for taking risks. I felt rejected when they showed only cursory interest in my endeavors. I got angry when they openly criticized me—and they were generous with commentary, most of it negative. I let them get the best of me, which gave them license to continue.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

My family found more traditional work settings comforting, while I found them suffocating. The structure and routine of a nine-to-five job in a big corporation never worked for me. I tired quickly of bureaucracy and became frustrated when superiors made decisions that did not align with my beliefs. Also, I was a very bright student, and my family thought I should use my intellect to become a doctor. The truth is, medicine appealed to me, but motherhood appealed more. I wanted the flexibility to work when I could so I would be home to raise my children instead of visiting them in daycare. So I pursued art instead of medicine—polar opposites for sure. This is the first time I remember being keenly aware of my defiant streak. I wanted to prove I could do what my family thought I shouldn't, or couldn't.



*Decide what to change. Make informed choices about what story components to keep, let go, change, and enhance.*

Make sure that defiance—and my choices—are truly serving me. They cannot only be the product of an “I’ll show them” attitude. Be true to my personal style, and be proud of it. Seek out individuals who think and do more as I think and do. Get acceptance elsewhere. Draw conversational boundaries if my family decides to “counsel” me about a better way of working and parenting. My choices work well for me, and I am proud of their results.

*Map changes. Goals and success strategies.*

Join organizations and network with likeminded individuals to bring about a sense of community. Rehearse a few short quips that are readily accessible when I need to steer away from topics that might trigger the response of feeling like an alien in my own family. Redirect family conversations that create opportunities for judgment toward things we have in common. Thank my family any time they start talking about my drum beat. Take control without becoming defensive.

*Author new experiences. Create the new money story you desire.*

I am a dynamic entrepreneur who has a history of success without the confines of corporate America. I understand how much money it takes to maintain my lifestyle, and I diligently work to meet, and often exceed, what I need. When I have excess, I save for retirement, have fun with my kids, and share with others less fortunate. I keep my family outside my career circle and get a sense of belonging from others whose lifestyle philosophy is more like mine.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

I will wear my identity as an independent entrepreneur proudly, even when I am with family. Or, if it seems like a better idea, I will deliberately keep my career stories to myself and save them for a family I choose—not as a replacement for the one I was born into, but as an addition. I will make all the strides I plan to make in a less traditional manner because it suits me and

because it has been effective. I will teach through example that it is important to understand what makes us tick and to be who we really are. I will be known as someone who marches to the beat of her own drum, and I—and others who seek me out—will enjoy the music.

## A Client's Work Pages

Mirabai Marquardt

*Recognize authorship. You are writing your money story: from assumptions to every choice about earning, spending, and saving.*

I am now aware that I am the author of my money story. How funny that one of my goals is to write a book, and I am just realizing that I have already written an epic of monumental proportions. This story is titled *The Woodstock Money Story: A Day Late and More Than a Dollar Short*.

*Own your story. Accountability is a prerequisite to change.*

I have been owning my story since beginning my ROADMAP and have uncovered several layers to the story. It is in the ownership of each layer that I have been able to move deeper and deeper into my money story. Even now I am finding that I continue to identify and own additional chapters of my money story.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

While I was assessing my plot and storylines, it seemed logical to start with my family's money messages. In reviewing these messages, I unearthed a storyline that far surpassed anything I absorbed from my family. This huge recognition was the influence that cultural/generational events had on my money story. I became very emotional as I contemplated and wrote about this new awareness, as I am letting go of this story and mourning the passing of this huge piece of my identity—a piece that no longer serves me and has not served me for many years. Although painful to admit, I am part of the Post-Woodstock Generation. The painful part is the Post.

I was fourteen when Woodstock occurred. Although I didn't hear about it until afterward, I immediately attached myself to the sentiments of the day: money and materialism were not cool, being poor was. Communes, free love, and living off the land were ideals that I bought hook, line, and sinker. Yet I was never quite able to live that life. I was too young—or perhaps too scared

—to declare my independence. So I hung onto the fringe—no pun intended—of that lifestyle. I vividly remember getting a new pair of jeans when I was about fifteen and spending hours washing and scrubbing them so they would look old, to avoid the appearance of being materialistic. Even now I find myself dressing in old raggedy jeans when I go to the food coop I belong to, so as not to appear too well off.

During the past month or so as I wrote my ROADMAP I lamented the fact that I was too afraid to totally embrace the hippie lifestyle that I was so enamored of. I blamed my inaction on my age at the time. Only in writing this story do I now realize that what appeared to me as fear is actually a very deep-rooted sense of responsibility, stability, and moral obligation. I now say those words with pride.

Part of that responsibility and stability fueled my decision to contribute to a 401(k) program in my previous job. I reaped the benefit of doing that when I took an early retirement at the age of 50. It is partly because of those decisions that I have been able to step so firmly onto my spiritual path.

Until just recently I had a small internal voice telling me that money is not good, that only greedy people have money. I have reinforced that by judging people with expensive cars, loads of jewelry, and McMansions as being shallow and not spiritual. I am a spiritual teacher and leader and host many classes and events at my home. I have recently recognized that I had a certain pride—even smugness—in owning a home that is very old and in need of repair. I also recall the first time I went to the home of one of my spiritual advisors and was actually relieved to see her modest surroundings.

I have practiced avoidance in regard to my finances, which spills over into my relationship. My partner and I have a very dysfunctional don't-ask, don't-tell relationship regarding money. Partly because of my I-can-do-it-all-myself mentality, I manage all of the finances and have avoided sharing the details of our current financial situation. My partner wouldn't know where to start finding our bank accounts (and debt) should I die and has stated so on numerous occasions. However, my partner has never asked to learn about our financial situation or take on any of the money management responsibilities.

*Decide what to change. Make informed choices about what story*

*components to keep, let go, change, and enhance.*

Enhance my new realization that I am a gifted spiritual leader, spiritual teacher, and healer. Begin marketing myself as such, and adjusting my fees to reflect this realization.

Let go of my scarcity mentality and the belief that having money is bad.

Let go of my belief that I'm incapable of earning a six-figure income or more.

Change my old pattern of looking for ways to avoid losing the money I have, and begin learning ways to grow my money.

Change my habits by setting SMART goals regarding earning, spending, and managing my money.

Keep and enhance my ongoing habit of making all of my bill payments on time. Although I initially thought I did this out of fear of harming my credit report, I have since recognized that it involves something deeper—a sense of responsibility and a sense of obligation to meet my commitments.

*Map changes. Goals and success strategies.*

- 1) Set up a meeting with my financial advisor regarding upcoming access to 401(k) funds.
- 2) Create and execute a plan to market my spiritual teaching practice to support my goal of five new students by June 15, 2014. This will include fliers, emails, and introductory classes.
- 3) Spend thirty minutes a day managing my finances.
- 4) Review upcoming changes to my monthly financial obligations in the form of bill payoffs. Instead of just absorbing these freed-up funds into my monthly cash flow, I will apply these funds to specific credit-card balances.

*Author new experiences. Create the new money story you desire.*

I am a spiritual leader, teacher, and healer who is capable and worthy of being well compensated financially to assist others in their personal evolution. I attract students and clients who understand that spending money on their self-mastery is right and good. I am proud to model abundance and prosperity in my life and aware that it exemplifies good stewardship, leadership, and my own self-mastery.

*Program new experiences and identity.*

I admire rich and successful people. My identity will be one of modeling prosperity consciousness. I will manage my money and tend it like a beautiful and productive garden. My new experiences include the joy and gratitude of generating passive income to continue my path of self-mastery and contribute to the evolution of the planet and humanity. Although I still believe in Flower Power, those flowers are now unfolding petal after petal and blossoming into responsible fiscal management, abundance, and prosperity.

**Addendum**

As a result of doing my ROADMAP I have already experienced some amazing shifts in my life.

1) It is said that “There are no accidents.” I recently “accidentally” learned about and ultimately attended a free three-day money seminar. As a result of the seminar and what I have learned in doing my ROADMAP I have completely flipped my approach to money from stemming the bleeding to looking at ways that my assets can work for me in the form of generating passive income. I am even venturing into the stock market and taking an online course on stocks, something I had never before considered.

2) I met with my financial advisor regarding my 401(k) funds and was sobered by what I learned. I literally got a huge lump in my throat and couldn’t speak for a few minutes. But I did it, and I feel empowered by taking the initiative. Two weeks later I received my quarterly statement. In the past I would have ignored it and left it unopened. This time I opened the statement and was happy to see that my fund had gained \$2,000 in that two-week period.

The Law of Attraction at work perhaps?

3) I spent an afternoon reviewing my monthly charges and identified approximately \$265 that will soon be available in the form of bill pay-offs and downgrades to current services. I have earmarked these funds for payment to outstanding credit-card debt.

## **John's Story**

Aaron T. Walker

The account that follows comes from my client "John."

For most of my life, I've been casting blame on others for my financial decisions, yet others have little influence in that arena. Being unwilling to take responsibility for all my bad choices is a character flaw of monumental proportions. I actually see now that I am the author of my own story. I'm 60 years old, and I have been letting my money tell me what to do for at least five decades.

It has been brought to my attention by Coach Aaron that my being accountable for a period of time is a necessary step in achieving greatness in my stewardship with money. I want to execute well in elevating myself to the next plateau financially, and I want to give each dollar specific instructions. Intellectually I understand that being a responsible adult requires discipline in financial matters, and I recognize that this behavior is paramount in daily activities. Good intentions have not served me well, so I must develop a carefully crafted plan and execute well in order to be successful.

For the past thirty years I just made a false assumption that steady raises, a secure position, and a healthy retirement would be my destiny. I'm an accomplished airline captain for one of the leading companies in America.

From the airline's vantage point my personal tenure was a liability instead of an asset, in regard to compensation and facing a looming and inevitable corporate restructure. Negotiating contracts between employees and management has become the focal point and chief topic of conversation in this industry.

On a personal note, spending freely beyond my means and speculating on tomorrow's resources became my mantra. I was raised in a home with little emphasis on achieving financial freedom. My mom and dad had little hope of abundance; just trying to survive was a daily task. Credit cards became second nature to me, and one by one the debts added up until they became insurmountable. I awoke to a grand realization that I would soon drown.



As a veteran pilot with three decades of experience, because I felt it would be impossible for me to venture into another profession, I feel a sense of urgency to exhaust each and every opportunity to increase my income and reduce my debt. My coach suggested we sell a rental house and apply the proceeds to the outstanding debt. Selling in a high-demand area, we were amazed at the size of the final offer. Rather than reducing our financial burden, the abundant revenue the sale provided eliminated it.

After much internal evaluation we also saw that my sky-diving hobby, the source of adrenaline highs, had been replaced with out-of-control spending. We quickly came to realize that we had a lot to learn about spending money responsibly. Having a coach will serve multiple purposes, but one for sure is accountability.

I have never been a goal-oriented person. However, I'm excited now that I feel I have strategies in place and a new sense of purpose. Budgeting my finances online has helped me identify the final destination for all monies. I don't mind spending my money on purpose; it's the surprises that were devastating my family. Now we have plans and goals, and I feel that I'm once again I'm back in charge of my financial future. With a three-month reserve and minimal debt I feel once again excited, purposeful, and invigorated.

Viewed as a trusted individual professionally, I want to have the same trust and respect from my peers, family, and colleagues when we discuss financial topics and my ability to be an excellent steward of the resources entrusted to me.

I want to live my life to the fullest and learn to balance needs with wants. I'm convinced that what I get out of life is not nearly as important as what I give to others. My new heart's desire is to live on purpose and free of guilt.

My personal achievements, tangible possessions, and ability to earn an income should never be tied to my identity. I want to learn to handle money and treat it as a tool, a medium of exchange. I do not want to give it more value than it demands or deserves. I want to eliminate the power it has had over me. I want to exercise control over myself and make intelligent and rational decisions free of any strong emotional basis. I'm excited about my new life, and with the proper boundaries and advisers in place, there are no limitations

as to the heights that I may soar.

## Money Story ROADMAP

Janet Barr, M.S., ChFC, CLU

*“If you don’t like something, change it. If you can’t change it, change your attitude.”*

—Maya Angelou

Doctor Krueger’s ROADMAPsystem is applicable to most circumstances. I have found that it has allowed me to enter into new conversations with clients in a way that I have never done before. In working with a client who’s open and has a good attitude, I find that the ROADMAPworks. I worked with one particular client (for privacy, we’ll call her Suzie in discussing her personal ROADMAP®). I have included direct quotes from the client as evidence of the power of the process.

First, Suzie had to **recognize** authorship, where the assumptions of earning, spending, and saving were discussed in great detail. When the assumptions were compiled in the first meeting between us, we found many positive attributes to focus on. Suzie was making good money by Santa Barbara standards, and spending as much as or a little more than her income. She had created an Excel spreadsheet that tracked almost every dollar of her spending. Although her materials were well organized, I was able to point out a couple of items she had forgotten. Suzie was on her way to accountability.

To achieve full accountability, you must look at the story. Suzie needed to **own** her story to move further in analysis of her actions. Together Suzie and I reviewed her current level of savings and discussed the long-term impact of poor decisions. She was saving for retirement out of fear and contributing the maximum to her 401(k), which by the way had a loan to pay for her car (yikes!). More of a concern for me was that she had no reserves for emergencies or opportunities. Suzie clearly noted these three areas as opportunities to analyze and amend. She understood that by going it alone, she alone was responsible, and she took authorship of her financial life up until that point. I reminded her that she was not alone and that together we would set markers to track her success along the way.

Behind the scenes, I began **assessing the plot and storyline**. I was identifying the patterns and learning to recognize behaviors. One’s money personality identifies those behaviors or actions that are ultimately the product of one’s life experience and messages internalized early from family and

circumstances. Establishing a timeline and revealing hidden messages makes understanding the behavior of many clients easier.

A triggering event for Suzie was her brother's death in 2009. She inherited some money from him but spent it soon after and consequently stated "she felt bad about the whole situation, money and all." Suzie had spent the money with little to show for it. This event exemplifies how personal and financial aspects of one's life are interconnected, and how crucial it is to own your story in order to recognize behaviors of scarcity, coping, and manic episodes.

Together we established priorities to help her decide what she could realistically change and to make informed **decisions** with my help and coaching. Having worked with her since May 2011, I knew what needed to change, so I opened conversations with her to start moving things forward by small steps that would build on her victories. As an example, the client did not know her credit score, so she pulled her FICO report to find it was excellent. Congratulations, Suzie!

Stroking her financial ego, I then offered advice regarding her 401(k) allocations and overall investment strategy. We then continued to address her income and expenses. After I helped her establish some priorities and requested her permission to proceed, I advised her to temporarily lower her contribution to her 401(k) and withdraw some money from an annuity that a life-insurance salesperson had locked her into. We cleared this with her CPA, then collaborated to reset and establish a new timeline.

With regular meetings, phone calls, and guidance from me, the plans continued to fall into place as I became the primary go-to person in her financial life.

In reflecting and analyzing our two-and-a-half-year relationship I found evidence to **map** the changes. Suzie helped to set a clear path once she made the choice to work with me on her money story. Her goal for 2014 was to visit Paris. This was a great goal to set and strive for, and Suzie is on her way to doing just that.

Through my experience as Suzie's advisor, I realized that Dr. Krueger's work and his ROADMAP system really helped me provide good guidance to support Suzie in her goals and coach her through every step of this process.

Having such goals as travel and other exciting adventures is exactly what it means to **author new experiences**, both personally and financially. Before Paris, Suzie had already started to author her new experiences by joining a

local hiking group. This experience for Suzie added almost no financial burden and started to enhance her new identity. Although she still occasionally rewarded herself with Chanel eyeliner, pedicures, and other luxury items, she had a new awareness of and vigilance about larger future goals. Suzie authored new experiences and changed old habits as part of her commitment to craft a new vision moving forward, balancing today's priorities against an uncertain future. My advice was "Plan for tomorrow and live today."

Through guiding clients, I help them program these new experiences and identity. With Suzie and other clients, I've discovered that this new identity keeps evolving, so that we can come together and collaboratively write the new story of what the future holds. For Suzie, all these changes lead to "feeling pretty darn good" and even sleeping better. It's important for clients to recognize how much can be accomplished by working with someone who's committed to understanding their situation. My goal is to help guide clients down the path to financial confidence.

In my experience, the ROADMAP system guides both advisor and client on a more direct path from point A to point B and in the process can help to eliminate roadblocks and detours. I see my job as anticipating and articulating some of the unknown and uncertain elements. My doing that allows clients to work on their own internal process, creating a new environment where they can coach themselves in many respects. In turn, the process gives them a good feeling about all that they have been doing, not just financially, but personally. Because the ROADMAP is helpful in many areas of life besides the financial one, my advice is to open it up, use it, aim for that destination you've always wanted to see, and live it!

## **Addendum**

Case Study Details

Meeting Date – Information Disclosed

May 2011 – Suzie is clueless, trusting, ROL mentioned

June 2011 – Reduce 401(k) slightly down to match

May 2011 – "Feels bad" about \$50,000 inheritance

May 2011 – Liquidity –needs cash

June 2011 – FICO she did not know what it was, but it was great

June 2011 – Get money affirmations

June 2011 – "No negatives at this point"

June 2011 – No “magic” number, reverse mortgage  
June 2011 – Last meeting “felt good,” believes she’s “in good hands”  
June 2011 – Brother passed away of lung cancer in 2009  
June 2011 – Paris in 3 years  
July 2011 – Mint is “FUN”  
July 2011 – Hiking group  
July 2011 – Netflix changed to less expensive program  
July 2011 – The insurances request  
July 2011 – Cancelling, improving cash flow, consumer reports  
July 2011 – Brother is gone  
August 2011 – Rewarded herself with Chanel eyeliner, fancy soaps from NY, pedicure  
August 2011 – Fun money/stk club \$5,000  
November 2012 – 401(k) loan paid off: 2/2013  
November 2012 – No money worries, what bothers her is credit card debt: \$13,000  
October 2013 – CC will pay off entirely  
October 2013 – Stopped 401(k)  
October 2013 – “Feeling pretty darn good”  
October 2013 – Feeling better and sleeping better  
October 2013 – Analyzed P&C coverage

## **A Work in Progress**

Heath van Fleet

The following is a work page and introspection using the ROADMAP process, focused on a successful life story and an overall wellness venture. The writer is a successful professional man at a crossroads in his life. He is taking a close look at what he believes is a money story, and he ends up making several large bold forward strides in his life mission. Let's take a look.

So, how do I begin? I've always had a sneaking feeling I would one day need to address my simultaneous love affair with money and dislike of it, but I put it off as long as possible. While delaying this bout with the inevitable realization that money actually matters, I accrued a significant amount of debt telling this sad story. I have never had a head for money but have never really had any emotional connection with money either. However, I have always wanted the things that money buys, and I recognize that money is what makes the world go. While I've been drawn dichotomously to a lifestyle that views money and all its trappings as an anchor to spiritual growth, I've also always felt I had to buy my way in. I like all the things money can buy. I think I'm feeling resigned to the fact that I can't completely give myself to that way of life and still get all the goodies I want. This has driven me to take stock of my relationship with money and my spending habits.

This is my first step in that direction. It's a bold step, and my mission is to leave only enough gas in the tank to get where I'm going, not enough to come back to where I am now. A complete and all-in-early approach.

So, as I recognize authorship of my current story about money, I also recognize that I want and need to align my beliefs with my real life situation. Life takes money to make it run, just as a car needs gas to go. When I can understand and use this to make a plan, I'll be able to balance spending, giving, and saving for the future. As I look at the things I like to do and the life I like to provide for my family, I just can't seem to make enough to maintain that lifestyle and sustain a growing family according to that lifestyle.

As a subtheme I've also had an internal struggle about what and how to spend my dollars. A typical scenario is that I will analyze a purchase, and the

larger the purchase, in the current perspective, the more extensive the analysis. I do this almost to a state of paralysis, and then for some reason that I can't quite pinpoint, I make a flash decision: buy or don't buy. Sometimes it's a decision that leans on the analysis, while at other times I just make the decision based on something that flashes into my mind and pushes me in a particular direction I follow. Am I giving up control of my story? I think the answer to that is yes, with the qualifier that I'm not sure why I let old habits determine my outcome instead of following the facts and information.

So at this point I'm thinking that maybe I'm not valuing money because it's easier to just let old habits write my story—a nice story to tell myself. A story where my lack of planning and follow-through can be linked to a greater good or a more noble story. This is just a story I tell myself to make me feel good about making money mistakes.

To paraphrase someone else's words, accountability is a prerequisite to change, and I can now own my money story, even though it will be painful to acknowledge that financially I am in my current state due to my lack of awareness and not following through on good plans and intentions.

I have, at many times and in many ways, written myself a story to get myself out of some entanglement. I write elaborate plans and make equally elaborate spreadsheets to work my way back to financial wellness. I believe that I know what a functional and healthy relationship with money looks like; I just need to give myself permission to succeed. I need to break old habits and write a new story.

I also realize that in past attempts I have tried to do the “can't miss” pieces of my money plan (and also my life plan, for that matter) in my free time. I keep trying to make these plans work without giving adequate time and resources to make them successful. I'm very good at getting a lot of work done in a short amount of time, and because of that I procrastinate. I put off what needs to be done in small steps, over time. I put those plans off until it is too late to add any real value, but I have enough skill and expertise to fake it to get by. If I would just put an honest effort into the process from the beginning, I'd have a better and more sustainable product. I need to attack this dysfunctional procrastination head on and replace it with a new story of success. If I expect to succeed, I need to set aside time to make the plan successful.



So, what am I going to change? Where do I begin?

First I think I need to acknowledge my expertise. I have a security mechanism, which I let get the better of me. I let things go to the last minute because I have built a habit of success, albeit mediocre success, by executing in a last-minute rush.

I also need to acknowledge that anything important—a plan for money and savings, or a plan for success in life—takes time and a dedication to excellence.

Here are some things I will start to do immediately:

1. Commit to self to make a habit of being successful at following through. Start small, make yourself promises and keep them.
  - o I am committing to getting up at the same time every morning for a month.
2. Work up a reasonable and simple budget. Just a couple of go-do's.
  - o Auto-pay savings and investments.
  - o Start the 6-months emergency fund.
3. Grow capabilities. Make yourself a calendar appointment and set aside dedicated time every day to study and perfect your coaching practice and the New Life Story® seminar material.
4. Grow your business. Make a 90-day plan that is actionable and has task-based items that are stretching but reasonable.
  - o Do one thing each week to move your business ahead with the end point of having a full practice.
5. Last thing. Find your joy every day, and commit to expanding that joy and sharing it with the people you love. Meditation and tai chi every day.

6. Very last thing. Stop pretending that success doesn't matter. It is important to living an abundant life.

If at this point I were to author my new experience, it would go something like this: I am a man who knows what his core values are and aligns his plan for success and abundance to those core values. I make a commitment to my present success. My future successes will now be dependent on how well I measure out my work and resist the urge to procrastinate or put off or delay work that needs to be done today. I am a man who is content with my skills and talents and celebrates the gifts that God has generously given me. I deserve success, and I will set myself in motion to achieve that success. I create abundance in my life so that I can spend more time, money, and effort on the things that matter most to me. Those things are my spirituality, my family, and my desire to help and inspire joy in those around me.

## **Addendum**

### Reflections on the ROADMAP process

When this client first started the ROADMAP process he was in a bit of a cautious position. He wasn't owning or understanding his money story, but as we worked through the process and talked through the steps, he began to have small breakthrough moments. We started with a discussion about his money plan in general. We began to tease out that he really had an outward appearance of not caring about money, but on the inside wanted all the things that went along with an abundant life. In order for him to give generously and provide for his family, he began to recognize that he needed to be successful and create abundance. He also started to recognize that he was self-sabotaging his efforts by spending beyond his budget, creating debt, and over-committing his time. He began to break through to the reality that because he was over-committing his time, he wasn't able to dedicate himself fully to any one venture and therefore creating scarcity instead of abundance.

The ROADMAP process walked him through the stages of change one step at a time. If I had called him on his stuff early in the process before he recognized and owned his story, we would have made less progress. As he

began to author his new story on his own terms, he felt confident that he could stick to it with me as his accountability partner.

## Money Mantras

Lisa-Marie Cabrelli

*Recognize authorship. You are writing your money story: from assumptions to every choice about earning, spending, and saving.*

In the middle of a session my client Evelyn (not her real name) made the connection between her resistance to completing a piece of business coaching homework and her fear of success and money. She realized that she was the one preventing her forward movement, whereas previously she had blamed circumstance.

*Own your story. Accountability is a prerequisite to change.*

Evelyn recognized that her lack of action was her own responsibility and was sending her straight back into her old storyline of financial insecurity. She took ownership of being in control of this story.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

Evelyn came from a background of poverty and family struggles around finances. Her father had left the family when she was very young, later becoming semi-wealthy. He provided nothing to the abandoned family, and Evelyn's mother was extremely bitter, blaming his money and her own lack of it for most of their struggles. Every time Evelyn tried to better herself, her mother belittled her for "getting above her station." After her mother died, then her father died as well, he left money in a joint bank account to both Evelyn and her sister. But Evelyn's sister bribed the bank teller and withdrew all the funds, telling Evelyn she didn't deserve the money. Rather than try to claim her share, Evelyn did nothing, and as a consequence the sisters no longer speak.

Evelyn had also married into a culture in which her spouse's family feels that any time there is money in the family, it's to be shared with all—although no one else in the family ever has any money.

On the basis of these old stories, Evelyn told herself she was unworthy of success and money. She believed that money would make her a bad person, a belief that caused her to continually sabotage success. She had a successful career in a graphic-design firm but left, just prior to a promotion and larger salary, to take a small-salary teaching job. Later on, as Evelyn began to realize

wealth and the potential for more, she was even sabotaging her own company.

*Decide what to change: Make informed choices about what story components to keep, let go, change, and enhance.*

Story components to keep: Constant re-alignment toward a success path, as the universe wants her on it. Let go of her contradictory belief that only some people deserve money yet are somehow tainted if they have it. Change her sabotage behavior at the first sign of success. Enhance her understanding that money is her private story and not one that must be shared or approved by others.

*Map changes. Goals and success strategies.*

Together, Evelyn and I came up with three strong mantras focusing on her success and progress in the business, enhancing her self-worth and letting go of her belief that she doesn't deserve it. We worked together to align her financial achievements with her family goals (especially her children), so that every time she felt tainted, she could look at her goals instead of her bank account and understand that no one has the right to judge what she does in the service of her family.

We worked together to help her acquire the tools to share and discuss a clear, managed financial plan with her husband, so that he understands that his family is their shared family only, not his larger family of origin.

Changed her business homework load to "next thing only" to make it impossible for her to blame the lack of action on an assignment overload or time restrictions.

Because every task required Evelyn to ask, "Why am I doing this?" she quickly became able to recognize self-sabotage and fall back on her mantras to get her through the resistance.

*Author new experiences. Create the new money story you desire.*

Evelyn created a new story, documented it, and reads it daily. It says (not verbatim), I am a successful businesswoman. I work very hard to build a business that supports my family and our dreams. I deserve to be successful, and I have earned every penny. I have clear plans for how I will use my finances to help my family reach our goals and give our children opportunities that we never had.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

Evelyn continues coaching with me for business growth and development, is more confident, and has assumed the identity and story path of a business owner rather than a schoolteacher “above her station.” She has also started marriage counseling with her husband after recognizing that their different values, cultural background, and beliefs about money were causing a rift between them. Her identity as a wife has visibly changed; she used to talk about her husband more as an adversary or vague threat, and now they are a team. She continues to struggle with her resistance to larger successes in her company but feels stronger when she faces them from her new identity, as it takes over more with each passing day.

### **Addendum**

In the year since we worked together to implement the ROADMAP system, Evelyn has continued to use the methods laid out in the study and has gained enough confidence in herself and her business to step away from coaching and do it alone. For a client who previously required daily contact via phone and email, this change represents major progress. The biggest elements of change are her confidence in finding and executing her own solutions and her joy in watching her material wealth grow. At the beginning of our coaching relationship, her chief goal was to accrue enough material resources to enable a return to her home continent. Yet she viewed this goal as unreachable, and her old negative money story made this a self-fulfilling prophecy.

I’m thrilled to report that Evelyn just reported having met all of her financial goals, and she has scheduled a series of life coaching sessions in order to review her plans for moving her family to her home continent by the end of this year.

## **My Money Story**

Diane Blasco

*Recognize authorship.*

I am the sixth child in a family of nine, raised in Westchester, New York. We were brought up in a structured, Catholic environment filled with much love, warmth, and discipline. As early as age 10 I babysat and learned the value of money while doing the family meal planning and grocery shopping. I remember the stress at times of not enough money, for access to credit cards was not an option, and bills and expenses needed to be paid on time. Throughout high school and college I held many jobs in which I was exposed to various aspects of the hospitality industry, including restaurants, country clubs, and hotels—environments where many appeared wealthier than my family.

Returning to the New York area, I enjoyed a successful sales career with Xerox and ADP, among other companies. I always managed to save part of my earnings and began investing in the stock market. In my early 20s I was also able to purchase a small co-operative apartment close to where I was brought up. Soon afterward, I entered an interior-design program in New York, as I had a passionate interest in architecture, furnishings, and home design. I began working for a decorator to gain renovation and decoration experience.

About this time, I married the only son of a successful entrepreneur who managed the family business. We soon bought a house, which I renovated economically yet tastefully. Although our marriage seemed ideal from the outside, I quickly began to see that our money styles were completely different, often causing conflict regarding goals, objectives, and spending habits. I was more conservative and used to saving for a larger goal, while my spouse did not understand the need to save and had always had the means to buy things right away. As he was involved in a business relationship with his dad, at first I didn't understand how emotionally charged, complex, and controlling a family business could be.

*Own your story.*

After seven years of marriage with two very active young children, we decided to move to Connecticut to build a larger house on a property I had found. With two young children and a baby this was challenging, yet I was able to do it while staying within a planned budget approved by the bank. I already had enough savings to pay for the kitchen and millwork, and I hired and learned from tradesmen, with beautiful results. The building part was enjoyable, yet with three active youngsters and a fourth on the way, I found decorating, maintaining the property, and developing the grounds quite time-consuming.

My spouse, who had previously worked six days per week, now worked seven just as our fourth child was born. He did this in order to quickly start and grow a new location for the family business, in response to a lack of succession planning. His dad was in poor health, which meant that life insurance for estate taxes was not an option. After my own dad's death, I had worked with an estate attorney and company accountant to create legal accommodations as a means to help the business survive.

Yet as spending for the new location went forward, with no marketing plan or budget, my desire for cost containment was soon ignored. Beyond that, the timing was poor, only minor market research had been done, and the effects of 9/11 affected the New York metropolitan area quite seriously. Real-estate holdings by the city of New York were causing uncertainty, raising an immediate need for a plan moving forward. My involvement in the business became more significant as I saw little planning underway for the next step.

### *Decide what to change.*

Although very busy with an active family and a large household, I became increasingly concerned with how overwhelmed my spouse was with the problems of the business. He was rarely available, often depressed and stressed out. I decided to get involved and tackle one problem at a time, as the company had been losing serious money for several years. I spoke at length with the employees, accountants, and some key customers and began to understand the real-estate issues, need for relocation and planning, lack of marketing efforts, and a decrease in sales.

I initiated the purchase of a new computer inventory system and renovated



a location to allow moving of the back office. I focused on accountability with branch managers. As well as hiring a general manager and sales people, I formulated and began implementing strategic changes to position the business for an eventual break-even or, with luck, a potential buyer.

Unfortunately, several days before the inventory system was to go live, I and other family members were involved in a life-threatening car accident, leaving me seriously injured and all the children quite shaken with the trauma. Recovering from surgery, with more needed, I had to focus on myself, my children, my spouse, and our recovery. I was unable to return to overseeing the changes intended to reposition the company for break-even and regain profitability.

As a result, the plan was not implemented, and the company kept going with limited financial accountability. Money from the sale of real-estate assets and the founder's personal income was diverted to the company to keep the doors open. About six months later, after I met with legal and financial advisors, I recognized that the company had in fact been bankrupt and borrowing money to stay open. The father's private equity and the real-estate payments had been funding the losses for five years. Two investors expressed interest in buying the name as well as some of the assets and inventory. I decided this had to happen as soon as possible, and with the help of a small firm I called on to put the deal together, the sale took place along with a five-year job/transition contract.

Relieved to have an end to the frustration, anxiety, and exhaustion, I hoped to start over and enjoy a renewed relationship with my spouse, only to encounter increased anger, depression, stonewalling, and verbal abuse. For many years I had pursued consistent attempts for counseling and financial planning, only to admit there was no mutual commitment to changes that might keep our family intact. Instead, my problem-solving efforts and forward planning in the aftermath of losing the business met only with immense resistance.

### *Map changes.*

Although I had requested a physical separation several times in order to focus on a better way forward, it didn't happen. With my first child now ready

to attend college, I needed to work through a personal and religious belief system in order to file for divorce. With no new plan for the future, we were caught up in the past failure, restricting forward growth and healing. Certainly not the picture I ever anticipated, yet the past four years have led us to a more stable and calmer place. I believe I have taken excellent care and support of my greatest assets (my children) and my home, and I have made investments in the stock market to generate income.

### *Authoring new experiences.*

Educating myself became possible through learning online, reading, seminars, and talking with people willing to share with me. Additionally, becoming trained and educated in coaching as a way forward through transitions and change has given me additional confidence about how our minds and brains work. I completely understand that we resist change even when it's absolutely necessary, yet the importance of living honestly with our ideals and goals is paramount to me.

The changes I have implemented have been difficult in many ways. I began to understand that unless we challenge our personal belief systems, we often end up in a life story we wrote that is not where we want to be. Patterns and habits that create struggles need to be monitored and measured periodically to help us evaluate and modify as needed, if we're to end up where we wish to be.

Initially I received the assistance of my portfolio manager, yet I soon realized that because I would be paying monthly fees regardless of performance, I decided to evaluate what I was investing in for myself. I have since established three different portfolios: one for personal income, one for retirement, and one for my next real move in real estate. I continue to speak with various advisors and seek objectivity and clarity regarding tax questions and financial planning. I have worked and educated myself around my children's schedule to support their academic and extracurricular interests.

The ROADMAP system is integral to me, after being immersed in a financially messy place for years, and I know it can benefit anyone needing to make hard choices. I understand the importance of clear vision and accept the uncomfortable process of change as part of a move away from lack of planning

and the consequent crisis mode. I have reflected on my other interests and passions and am combining money coaching with a healthy lifestyle design for each season of our life. Our financial and transition decisions are accompanied by change, which requires guidance and a specific written plan. I have taken several opportunities to travel to areas of growth and opportunity, as the need for a new beginning requires research and looking for the next opportunity. Finding our next step, purpose, and place in life is faster and easier with a vision and a ROADMAP®, so we can write the story that we wish to live.

*Program new identity.*

The ROADMAP System clarifies the steps necessary for positive results after being limited by others' patterns of attachment. Our own belief system needs to be examined and understood before we partner with another who has grown up with a different belief system. Many people assume that these patterns can be modified or changed, yet this is where the ROADMAP System provides a proven template for success.

I assumed that the greater vision of one's own family would lead us to combine the best of each individual's belief system for a better way forward. Yet repeating what doesn't work is often done automatically and without trained awareness or steps to productive change from what generations before us did. These habits, created early, need not be a guide for the rest of life. When we have a vision of where we want to go and know how to establish action steps to take us there, we certainly increase the likelihood that we will arrive. The ROADMAP System can be used in any area of life in need of improvement and change, as long as we know where we want to go and how we want to get there.

## **The Jet Set Physician**

David Krueger, M.D.

The following is a work page according to ROADMAP for a New Money Story® by a successful professional man going through a career transition and money story revision in Executive Mentor Coaching with me.

*Recognize authorship. You are writing your money story: from assumptions to every choice about earning, spending, and saving.*

I am aware now that I am the author of my money story, although previously I would have seen it as just happening, as a matter of the way life is.

*Own your story. Accountability is a prerequisite to change.*

Now I can own my own money story, even though it is painful to acknowledge that financially I am in my current state through my lack of awareness and not following through on many good plans.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

I have made good money throughout my career, but spent it on desires and wants. I saved only under structured plans and withdrawal and that inadequately. I have been aware of this but took no action. I have not asserted myself towards others regarding spending vs. saving, including me. I never took the whole use of money seriously, mostly relying on making more as I needed it. I came from poverty, believing I would not be wealthy or financially independent. So I spent most of what I made. Most of the time I felt satisfied with my earnings, but I didn't manage it well. I used money to indulge myself and others, acquiring objects, not accumulating funds in reserve. My family never saved; we lived each day as it came. There was never enough money, and even what I earned in my early years went back to the family for survival. I have not used good financial advisors over the years.

*Decide what to change: Make informed choices about what story*

*components to keep, let go, change, and enhance.*

Keep my ability to earn money, although that seems limited by a decreasing desire to devote time to work. Let go of emotional spending, and begin asserting myself when others' spending comes up. Change to find new advisors for investment and management of current funds, monitor finances regularly again, take on no more additional debt through big-ticket items, pay off current debt, and continue on cash payments. Let go of script of scarcity.

*Map changes. Goals and success strategies.*

Meet with new advisors; have started this process. Monitor and be accountable for spending. Doing this with Quicken. To produce more income: start coaching more clients, market that I am starting a coaching practice, support my spouse in making more income, find better passive-income instruments.

*Author new experiences. Create the new money story you desire.*

I am a man who can generate income adequately and deserve it at a level of payment geared to the service I provide. I can have enough money for needs, wants, and desires while saving to feel more secure. I am allowed to live in the world of abundance and discover people who want to support me in this money story. I will begin more discussions about money with friends, family, and people who grow money for a living.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

My identity will be that of one who is aware of finances in my daily life, through reading and discussion with people. I will become knowledgeable about money as well as a student of finances. I will start with new advisors, meeting regularly with them, assessing the value of their input and past performances. I will spend wisely, with awareness of the consequences of my choices. I will make assets become revenue-producing. My identity will include satisfaction with making, spending, and saving money to gain more freedom and security for me and my loved ones. I will do more service work in my community as a return for this support. I will experience the state of

abundance and enough.

## **Recognizing Beliefs of the Shadow Story**

Lynn Marysh

### ***Recognizing authorship of my money story.***

I was raised in a middle-class home where I often heard my mom say, “The months come quickly!” “Stop wasting!” And the all-time favorite, “Money doesn’t grow on trees!” When I wanted something, I usually got the comparable item at Zellers or Bi-Ways. There never seemed to be enough money to supply me with what I wanted. When I was 12, I started to trade time for money by babysitting and working at the church banquet hall, followed by fast-food places when I turned 14.

When I started earning money full-time, one of my jobs was working on a word processor for a large insurance company. It was a state-of-the-art word processor for its time, and I made just enough to cover my portion of the rent for an apartment shared with a friend. The rest of my earnings paid for my groceries, with very little left over for incidentals. When I left that job after two and a half years, I started work for the railway. Still trading time for money, but here I worked on an old electric typewriter and made almost twice as much as my former job on a word processor. It was hard for me to believe I was making so much and had so much more freedom. I actually thought they had made a mistake on my paycheck.

Reflecting back on this period of my life, I got a sense of feeling unworthy of the money I was making, as I had gone through many job interviews before landing the insurance-company job. I recognized that I had felt this same emotion in my early childhood. Being unworthy of my parents’ love, unworthy of being cared for in the way that was happening.

### ***Owning my present money story.***

Trading time for money has been part of me since my first babysitting job. It comes naturally to me, as it’s all I’ve known to do and been taught to do.

I’ve made attempts to earn money in different ways on a part-time basis but have never been convinced that it was the right path to take or done it full-time. I’m a fourth-generation railroader, and because railroading is in my

bloodline, I've embraced it as my career choice. It may not be one I need to uphold, but I do feel some loyalty to it, as it's been relatively good to me. I feel a sense of security working there, knowing that I have a regular paycheck coming in and a pension once I retire.

### *Assess my money story plot and storyline.*

Because I've been doing the same work at the railway for many years, I'm comfortable doing it. Though not my ideal job, it meets most of my needs. The job does not fully meet another need, though—psychological fulfillment—which is perhaps one of the reasons I'm always taking personal development courses on my own time. My hope is that one day I will find fulfillment in my day-to-day activity, along with my life purpose and work.

But for now I continue to work my nine-to-five job, trading time for money and continuing to live out the story that "There's not enough money." Some of the courses I take are expensive, and I inevitably benefit from them, yet I remain stuck. Seeing no way to pursue two careers simultaneously (one with the railway and the other pursuing my life work) I haven't found a way to move beyond working a nine-to-five job to achieve financial independence and feel fulfilled.

### *Deciding what to change in my money story.*

What I decided to change is my current attitude towards my salaried job, which I'm grateful for. It gives me security and the ability to channel some of my personal time to pursue my passion through personal development courses.

There is enough money. I just need to be a better steward of the money I earn. I need to apply and put into practice what I've learned over the years with regard to money. I have time during my commute to and from work to start focusing on my business, moving me in the direction of fulfillment in a career I will love.

### *Mapping changes.*

I continually regulate my states of mind to allow me to focus on the day-to-day activities of my nine-to-five job. Following this time, I focus on



reviewing, implementing, and executing my business plan.

I remain relaxed and centered during stressful situations to eliminate emotion-based decisions.

I check to see if I already have something similar in personal development material before I purchase something new.

I reach out to people who are already business owners locally and afar whom I can partner with.

I manage my money and seek consultation when uncertain of what I should do next.

### *Authoring new experiences.*

My mantra: calm, relaxed, and centered.

My money mission statement:

Money flows to me easily and frequently whereby I'm able to make a positive contribution in my life work.

My goals:

I changed the structure of my commute to and from work to better utilize my time.

I put together a list of contacts to partner and/or joint venture with.

I drafted what I plan to cover in my programs.

### *Programming new identity.*

I will identify with my new money conversation of "There is enough" and I will be responsible for managing my money and being a student of finance. I will keep calm, relaxed, and centered prior to making purchases. I will spend wisely and be aware of emotion-based purchases. I will delay such purchases to evaluate my thinking behind them. I will look for and create revenue-producing assets to gain more freedom around money for me and my family. I will find out what kind of advisors people use to manage their finances.

I'm creating more balance between work, family, and my personal time to maintain good mental, physical, and spiritual health.

### **Addendum**

In putting together my ROADMAP®, I recognized that my current thinking

was developed while growing up. At a young age I believed I was unworthy. Things that happened to me during this period of my life had me believing this. My undeveloped brain fabricated this thinking, and this thinking stayed with me and got repeated over and over again throughout my life. The mindset of being unworthy influenced my relationships as well as my finances.

As an adult with my adult thinking, I've been able to now recognize this unworthy- thinking conversation and change it to one of being worthy and capable of achieving a lot more than I've permitted myself to accomplish up to this point.

Life has allowed me to experience more than perhaps I would have if I had been born into wealth.

The place I find myself today is a place with more clarity. The ROADMAP system is easy to follow and apply, allowing me to have balance in my work, family, and personal life, all the while maintaining good mental, physical, and spiritual health as I continue to grow towards my personal and financial goals.

## **II. NEW CAREER STORY**

### **Core Value Investing in Your Career**

A wealthy individual once told me that although he didn't need to work for financial reasons, he still needed to work. "Working fulfills me, fulfills my desire to achieve. I say who I am through the work I do. When I'm not working, I feel like an artist without a palette." He described his value to produce, to contribute, and to achieve. Work was not a compulsion or addiction, but a form of self-expression of his core values. Most of the serial entrepreneurs I've worked with have these values.

Others rely on work to provide continuity and stability, for self-validation, as a central organizer, or to maintain an internal order. Work is an expression of our entire human being. While it is only one expression, it often means more to us than the money or the other rewards it brings.

Individuals who find no pleasure or fulfillment in their work or career—who only "do their job"—remind us how vitally important work is to our emotional life. Those who feel depressed or lost after a long-awaited retirement capture our attention as well. Work is the stage on which we enact a large portion of the drama of life. However complete our sense of self and autonomous our self-esteem, work still colors our perception of ourselves.

Work is often idealized as an identity. To some extent we define ourselves by the work we do. If self-esteem and self-respect sag, external markers such as work, prestige, and income level become even more meaningful. Why we work (besides money) holds different meanings for each person: self-esteem, gratification, personal ambition, creative expression, ethical values and beliefs, and internal needs. Work can also serve as a defense against unwelcome emotions and activities, offer relief from guilt, or offer escape from other life stresses. Work effectiveness may silence internal voices whispering "inferiority." Work and career are the domains of mastery of one's life and fate.

Those who are successful in their career almost always find it enjoyable and meaningful. William Osler, a 19<sup>th</sup>-century physician and teacher, stated, "The very first step towards success in any occupation is to become interested

in it. Experience and observation also help us see that success or failure in any endeavor is caused more by mental attitude than by mental capacities for almost all of us.”

Value-based goal setting highlights the distinction between satisfaction and mastery and the intrinsic rewards of work such as pay and prestige. Healing professionals, including professional coaches, often have difficulty with the business of their practice, particularly with charging a reasonable fee. Their difficulty stems from the core value of compassion and helping others, which seems to counter charging money for it. Often a simple reframing is useful, for example, to properly value the work by charging appropriately, and to see the fee as structure and boundary within which meaningful work can be done. When this structure is in place, neither provider nor client is preoccupied with it. The professional’s comfort in setting and maintaining a fee serves as model for the client.

An example of an externally oriented work ethic is that of someone who always does what he or she *should* do and is *supposed* to do, constantly focusing on others’ evaluation rather than on internal initiative and values.

To compare yourself to someone else in any respect is to compare your inside to their outside. This is not an apples-to-apples comparison. When you look at someone else, you see only what you can generalize, or even idealize, while experiencing directly your own doubt, uncertainty, or discomfort. This would be like the beginning writer who picks up a piece of classic literature and concludes that he or she could never write as well as that author.

A common assumption is that those who succeed remarkably are the most driven, work the most relentlessly, and give up the most of their personal life. Harvard psychiatrist and psychoanalyst George Valliant, having studied a group of individuals over several decades, found that, contrary to popular mythology, those who enjoy the best marriages and the most intimate friendships are also most likely to become extremely successful in their professions and corporate world. Many of the successful people in his study were so certain of themselves and their goals that they actually preferred to preside over their own smaller businesses than to become wealthy as an executive in someone else’s larger company.

## The Dynamics of Change

The *change* is the *event*—the situation. You move to a new city, divorce, retire, have a significant loss, take a new job, lose an old one, retire, or change careers. As we focus on change, we address the rituals of change, the work tools, the strategic goals.

- First, the idea of change will create anticipation.
- Then, as it is on the cusp of action, trepidation follows—even anxiety.
- Next, if you continue rather than return to your comfort zone, expansion into the new experience occurs.
- Then, finally, mastery is felt.

Two additional aspects of experiencing change may seem paradoxical.

- *Every step forward means relinquishing a past position.* Someone must mourn—say goodbye emotionally as well as practically—to a familiar, maybe long-held and practiced—old story, even one that doesn't work that well. This is a process—a developmental step. Not something you can just say and make it so, or recognize it and change it. Giving up a habit, a pattern of behavior, or a hope that by getting the old story just right (or doing it better) will make it work is like saying goodbye to an old friend.
- *The more subtle aspect in learning something new and creating change is an injury to self-esteem.* This carefully crafted old story—with even some aspects of identity attached—is replaced by something better.

Every transition begins with an ending, a change event, and we have to let go of the old before we can begin the new. Every beginning ends something. And as American writer Agnes Allen has observed, “Almost anything is easier to get into than out of.”

Changing to a better job or career may ironically cause a similar grief and confusion as the sad end of an important relationship in the past. The reason it's important to recognize this is that some of the feelings you experience

today may have nothing to do with the present ending, but come from the resonance with similar situations in the past.

Letting go is difficult. Herodotus, Greek historian (5<sup>th</sup> century B.C.), said this: “Diseases always attack men when they are exposed to change.” Even when we look forward to a change and anticipate it eagerly, some of us still hold on to what we used to be, and we wonder whether the change was a good or bad idea. We are defined—and define ourselves—by our roles and relationships, both those we like and those we don’t.

## **The Dynamics of Transition**

The *change event* is the snapshot; the *change process* is the wide-angle view; the *transition* is the time-lapse photograph.

The *transition* is the *process*, the internal story of change: a shift in orientation, even self-definition. Transition is awareness of the seasonal cycles while attending to the daily weather. As you respond to change and embrace transition, you let go of the old story, the outlived chapter, and evolve into your new story. You transform a new identity to internalize the changes—to sustain and enhance them.

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 more so.

Yet, seemingly paradoxically, old stories need to be mourned, and along with them, the self left behind.

You also have your own characteristic way of a new beginning, just as with endings. Change and renewal seem to involve new relationships, but they can also involve new places or projects. For some, it begins with a new state of mind, a new feeling, self-image, or goal. Sometimes the beginning happens through careful and conscious effort, but for many people important new beginnings have a mysterious and sometimes accidental quality. Although we believe we take charge of our lives and believe we plan carefully to start again after an ending, some of our most important beginnings take place in the unfocused darkness outside our awareness.

Without a transition, change simply rearranges the furniture. People imagine that they can prepare for retirement by making specific changes, such as adequate financial preparations, a place to live, and developing new interests.

Yet the challenge is the transition, and change only prepares you for the transition.

People have to let go of outlived chapter of their life story and find a new one to replace it. In the same way, they must let go of the outlived chapter of a business story to create a new one.

At times, rituals and celebrations further the process of transition, as well as serving as markers.

Every lifetime has its own unique rhythm, and the personal developmental steps for both change and transition deserve attention. Transition is a process and takes time. No matter how many people you put on the job, having a baby still takes nine months.

### **3 Components of Transition**

- First, there is an ending.
- Then comes a neutral zone—an important directionless time in between filled with mourning, with work, and with getting ready.
- You finish with a new beginning.

## NEW CAREER STORY ROADMAP CASE STUDIES

### ROADMAP for a New Career Story

Ahalya Baguio

#### *Recognize authorship.*

The depth of my understanding of having written my own career story grows clearer as I get closer to a hundred. While this is about my career story, all facets of my human experience are involved: relationships, money, and my evolution, since I am the common denominator of the cause and effect of each facet of my journey. My career path is an unfinished novel where the story of my growth and clarity continues to unfold. It is a nonfiction narrative of past, present, and future, revealing who I am. Now I am in the next edit as I refine this chapter of the heroic protagonist's journey. I realize the story has had a theme and rhythm all along.

While I have managed to acquire a couple of academic degrees, numerous certifications, and a few professional labels, the theme for my career adventure has been my desire for personal growth. Everything I have ever done in my career has been in some service to others, whether as a real-estate broker, human potential trainer, or spiritual teacher. Yet it is clear to me that before the need to serve came the longing to grow as a human being.

In hindsight I can see how each experience prepared me for the next step, and at the same time I can see that, had I known how to do it differently, I could have saved time and suffering along the way. Still, I'm okay with my journey so far. While it may not have been smooth, it definitely was not boring.

#### *Own your story. Accountability is a prerequisite to change.*

I never wanted to work for anyone else but myself; the closest I would come is to contract for a specific period of time. Just don't ask me to report on a nine-to-five schedule or punch a clock. I have always been willing to work longer and harder, provided I could map my own way. This is good news and bad news. Of all the characteristics that could describe me, lazy is not one; however, undervaluing my contribution with resultant overwork for less reciprocation than appropriate was.



My old story was about having to work harder than anyone else to qualify—for what? I was never certain. Something like measuring up to some elusive standard I felt others had and I needed. It never occurred to me that I always ended up in the inner circle or top level of whatever situation I was in. No matter what I became involved in, I worked closely with the founder, head, or decision maker. Now I can see I had more going on for me than I realized at the time.

Yet, even working closely with leaders, I did not consider the possibility of being one. I just instinctually knew to hang out with folks who knew or had accomplished more than I had. And while that's a smart assessment, it was accompanied by a devaluing of my own capabilities and overall value as a contribution. Had I a healthier ego, I would have realized that those folks were also fortunate to have me. It has taken me a lifetime to figure that one out.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

I grew up with the term “haves and have-nots.” Reference to the elusive “they” and “people like that” was always present. Yet money is a small part of it. Having wealth, education, and endless possibilities were not in the conversation. Working hard, having a dream, and getting by were. Graduating from high school was expected; attending college was not. While it was okay for someone to go to college, it was not encouraged or discussed. The assumption was that one graduates and then goes to work. I was the first one in my family to attend college.

If I were reading a novel of my life story so far, I would see a protagonist who was compelled to transcend the level of possibility thinking she was born into, to up the level of achievement surrounding her. Any stumbling in my career path came from an ingrained, unconscious conditioning of “Work really hard and don't expect too much.” Also present was the idea that I could do more if I knew how—more of a conversation in my head suggesting some elusive secret others knew but I did not.

*Decide what to change: Make informed choices about what story components to keep, let go, change, and enhance.*

I have come to value my contribution. There are times when I am surprised at where I am now in my life. There is no doubt that I am a leader, and I chuckle in reflecting that even in high school I was a leader, albeit of a small band of would-be rebels.

There is a tremendous amount of good I will keep from my old story: those traits that have caused me to want to learn, the willingness to do what needs to be done, and seeing possibilities.

I leave the old story of working hard, struggle to be justly paid, not having enough time to write, putting everyone and everything ahead of what makes me happy in my work. I now make it a priority to do what is necessary for the success in my new career focus.

I will keep the vision of possibilities that I seem to always have had and enhance it with a strong sense that I already possess that secret I thought I needed. I embrace a new, clear direction of what I want to accomplish in this stage of my journey. This chapter includes mentors with skills in areas that I lack and whose collaboration I benefit from, knowing I am also a contributor to them.

*Map changes: Goals and success strategies.*

I am now very clear about what I want to do in my work, how to offer my usefulness in a manner that makes me happy and fulfilled. I write, I am a Self-Mastery Mentor Coach<sup>TM</sup> and I teach—in that order of priority. My writing is a product of and for everything I do. My coaching is my main income generator and a catalyst for my teaching courses. My teaching is limited to courses and retreats in the alchemy of self-mastery and courses in shamanism. What I offer is a synthesis of everything I have learned over the past forty-five years of intense study on my spiritual path and experienced in my life journey.

Moving beyond visions and aspirations, I have mapped out a plan of action. I find SMART goals (simple, measurable, attainable, relevant, and time-bound) inspiring and encouraging. If I do “this” I can accomplish “that.” I had never taken this process seriously before. I have now figured out the “how” of offering my services that is useful and beneficial to others while also pleasing and financially beneficial to me.

*Author new experiences. Create the new career story you desire.*

I am useful and effective in my service to others as a spiritual teacher, Mentor Coach, and author. I write regularly, publish consistently, and find what I share to be useful to others on their journey, compelling them to their own self-mastery of living a fulfilling life of purpose and joy.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

I am not who I used to be and am not yet who I will become. In this present moment I am content to have found my way to yet another new beginning in the endless cycle of reinvention and regeneration to a new career story—a new *everything* story.

## **Addendum**

The results of changing perspective and using the process of focusing on the New Life Story® system has been a catalyst for freedom—the freedom of conscious choice producing amazing results both personally and in business. I have undeniable measureable results from my new way of approaching my business of service to others. Adding this process to the synthesis of my years of study and experience has brought about a profound shift in my career experience. I am full of gratitude.

## **Exceeds Performance Standards**

Rosalie D. Gibbons, M.F.T.

### ***Recognize authorship.***

Until now my career story has been based on long-held unconscious assumptions and beliefs and my definition and view of my career. It has been shaped by the choices and decisions I have made—some good, some bad. It has also been formed by my willingness or unwillingness to take timely responsive action. When driven by my passion, purpose, and creative power, I have been innovative, energized, and dynamically productive and successful. When I have succumbed to self-limiting unworthiness issues, I have denied my “penmanship,” missed opportunities, and sabotaged possibilities.

### ***Own my story.***

Accountability and ownership are prerequisites for writing a new career story, an existential choice which many times I have actively and passionately embraced, at others, wantonly denied. As a result, I have tended to remain in homeostasis and view myself as falling short of the mark. Today I acknowledge authorship of the old story. I recognize the language, syntax, and context I used to reinforce that story. Most of all, I recognize my penmanship, its distinctive structure and signature. However, I have now put the final punctuation on my old story—a period. I have finished and closed that book. Though in large measure it was a good read, I am ready to author a new story, one that is personally affirming, speaks to my purpose and passion, and is compelling to family, friends, and colleagues alike.

### ***Assess storylines and plot.***

It is only in recognizing my old storylines, my insecurities, and fears that I have the power to change. For more than four years I actively facilitated team decisions with families, community partners, and interagency service providers. Then, in November 2013, I took a leap of faith and “stepped to the front of the room,” exposed to critique and evaluation from colleagues, cohorts, and others up and down the chain of command.

In my previous story, I had occasionally reacted to a self-imposed dilemma—though I have a passion for designing and facilitating experiential learning, I also feared exposure, evaluation, and criticism from others, as I continued to adhere to self-described worthiness concerns. However, when the opportunity for a career shift presented itself, I jumped in. Though I immediately had a rush of anxiety, fear, and excitement, I simultaneously felt the fear and took action. A dear friend and colleague often says, “Fear is the distance between the thought and the action.” The moment I jumped in, my self-generated doubts, fears, and apprehensions dissipated. What remained were exhilaration, eagerness, and enthusiasm.

### *Decide what to change.*

To make informed choices about what story components to keep, let go, change, and enhance, I first reaffirmed my agreement with my agency’s vision—setting the standard for excellence in child welfare. I reviewed the agency’s mission—to partner with families to ensure that their children can live free from abuse in safe, nurturing, permanent homes. I also reconsidered its values. If I am to be authentic in my agency position as trainer, facilitator, and coordinator, my beliefs, values, and fundamental assumptions about people’s abilities and capacities for change must be consistent and in alignment with the agency, and they are. Though I live in Southern California, I stand on solid, unshakeable ground. The agency is committed to creating a positive, service-oriented culture which does the following things:

- Models core values of respect, integrity, caring, trust, and excellence
- Attracts and retains the best and the brightest
- Fosters a spirit of collaboration and partnership, internally and externally
- Supports creativity, innovation, and responsiveness
- Demonstrates a can-do attitude in accomplishing timely results
- Creates a fun, fulfilling, and rewarding working environment

In the weeks prior to my November 2013 leap of faith, my nonprofit experiential partner and friend Gloria Manchester and I had just designed and implemented a Lifeline Exercise for our Partner in Excellence courses. As we never ask a student to do anything we have not already done or are not willing to do, we tested the exercise on ourselves first. In summarizing this very personal and powerful process, I commented that with regard to the various

circumstances, events, and transitions throughout my career, I had generally taken a positive perspective and sought to identify the lessons learned in my successes and perceived failings throughout each decade. That was not to say that I never experienced disappointments, difficulties, or delays, but that I consistently reassessed, recalibrated, and reframed circumstances to achieve the best possible outcomes and forward my career.

In my new position I am one of five who shoulder the responsibility for training Children and Family Services (CFS) personnel and/or coordinating or facilitating trainings presented by specialty experts. The CFS team makes critical life-changing decisions about children's physical and emotional safety, well-being, and relational stability and permanency. I take the inherent responsibilities in this new role very seriously.

In coaching, Dr. Krueger states, "Mastery requires you to proceed despite your anxiety. ... Mastery and effectiveness convert anxiety and uncertainty to comfort." He further asks us to consider anxiety as a signal that we are proceeding in new territory, beyond where we've been before.

I am clearly mapping uncharted terrain. A short time ago, I was given an assignment in an area where I have little expertise, responsible for coordinating and delivering several trainings to a critical part of the CFS team. I was instantly flooded with a flurry of concerns: I had to develop a level of expertise to ensure that the trainings were valuable, effective, and empowering. I also had to quickly acquire hard and soft skills to implement the training. My program manager and I readily assessed requisite skills sets, brainstormed ideas, and mapped design and development strategies to complete and implement this critical addition to the training program.

*Map changes: goals and success strategies.*

My goal is to provide dynamic and powerful trainings that cause participants to be impassioned agents of change and interruption in the lives of those caught in the cycle of abuse. I am committed to develop an effective training style that maximizes transfer of learning and skills acquisition for agency personnel. Throughout the coming year, my intention is to solicit support and feedback from the other CFS trainers, maintain frequent supervisory consultation, develop an internal accountability partnership, and maintain monthly engagement with my corporate mentor, as well as practice, practice, practice.

### *Author new experiences.*

Global leadership and change expert Sheila Murray Bethel has said, “One of the most courageous things you can do is identify yourself, know who you are, what you believe in, and where you want to go.” I know who I am, my values and convictions are clear, and I know where I am going. As I write my new career story, I am committed to make each day a story worth telling and each course a lesson in engagement, empowerment, and excellence.

### **Addendum**

To live in possibilities we must be willing to relinquish our old stories and step beyond the boundaries of certainty, limiting beliefs, and familiar expectations. If we are to reclaim our hearts, reignite our passion, and refuel our dreams, we must dare to leap into an unknown future ready to rethink everything and write a new life story.

Just weeks before starting Dr. Krueger’s New Life Story® Wellness Program, I took a career leap into an area that would stretch my capabilities, competencies, and experiences. At my six-months review, I earned “Exceeds performance standards” from my direct administrative manager, a review grade rarely earned in the first year in a new position. I had quickly become an integral part of the training team offering suggestions and feedback, willingly assisting the more seasoned trainers, and contributing skills, knowledge, and expertise. I designed, developed, and facilitated exemplary trainings in some areas, coordinated standardized trainings in others, and received less than stellar push-back results in still others.

As a trainer in child welfare my commitment is to provide a leading-edge, multifaceted experiential learning environment that sets the standard for excellence and exemplifies the agency’s core values and service-oriented culture. Though the affirmation and acknowledgement in the first six months has been rewarding, it has been the negative push-back from course participants that has kept me in balance and grounded. In fact, it is the push-back that challenges me to look more closely and roundly at evaluations and audience needs, and to gain guidance, perspective, and input from my supervisor, colleagues, and mentor. The learning curve, though steep, has

enriched my skills development and given focus, dimension, and refinement to my new career story.



## Authoring My New Career Story

Cathie Rodgers

The following is a work page from the use of the ROADMAP for a New Career Story® by a successful professional woman going through a career transition.

*Recognize your career story. Clearly describe your career story as it exists now. Then describe what you want in your career story.*

I am now aware that I am the author of my career story, although recognizing it wasn't always easy. My mother believed that a woman's role in life was to be a wife and mother and wanted me to believe that as well. I wasn't buying it. I believed that I had a lot more options in life and at 23 set out to test my theory.

Today, I am a wife and executive assistant to a vice president of a Fortune 500 company. I have been in this position for many years; however, both the position and I have evolved together over the years. I also work in the CEO's office on an as-needed basis. In addition to supporting my manager through the daily administrative tasks, I also support hundreds of employees within the company who want to meet with my manager by being a resource person, problem solver, and compassionate listener. I am also an event planner.

What I want in my career story at this time is to create a career that will sustain me in my sixties and beyond while embracing my needs and values.

*Own your needs and values regarding career.*

My need is to be part of a community. I see myself working in an office within a group of mutually minded professionals, possibly within a holistic center, or if I do work from home I will have a virtual team so I feel part of a community.

Another need I have is to express my pioneer spirit in whatever I do by having the freedom to do it in my own creative way. This pioneer spirit is part

of my decision-making process. It is why I applied for the position I am in now. This was a newly created position where I was free to create the job by being me instead of squeezing into someone else's shadow.

One of the most important values to me is living a balanced life. When I was single I worked as a legal assistant for several years, nights and weekends, and recognized that this was not in harmony with my values. Now, I am married and choose to work a job with occasional overtime so I can devote personal time to other areas of my life.

*Assess what is present and what is missing in a current career. What information do you need? Research new information regarding personal skills, abilities, and aptitudes.*

What is present in my current career is the feeling of community, the opportunity to be of service to hundreds of people, a structured time frame of work, and benefits.

What is missing in my current career is flexibility of work hours, a more relaxed work environment, working for my own cause, more control over my work life, and recognition and payment for helping others through transition.

*Decide on a plan and how to make it work.*

My plan is to continue working where I am while taking my next steps. The most rewarding part of my work has been guiding and supporting others through change and transition. This is what I love to do and want to be known and recognized for. Until recently, I didn't know how to market and sell this work without becoming a licensed therapist, so I did it under the guise of my admin work, which my coach calls the "watercooler therapist."

Today, I am aware of the change and transition work done through life coaching and want to be known and paid for being a life coach.

*Map your plan. Where, when, how to begin, SMART goals, initiatives, next best action.*

SMART Goals:

Specific. Target a specific area for improvement, take courses relating to being a coach and an entrepreneur.

Measurable. Quantify or at least suggest an indicator of progress. Within three years move from full-time employee to part-time employee and creator and builder of a coaching business.

Assignable. Specify who will do it. I will practice coaching by blending coaching into my day job to minimize working nights and weekends

Realistic. State what results can realistically be achieved, given available resources. I will practice coaching, create my business brand statement and website.

Time-related. Specify when the results can be achieved—within three years.

*Author changes. Implement the plan. Reach your goal.*

I will offer coaching services to my colleagues and have several clients, including women in senior management. I will write an outline for a small coaching workshop to present to my manager in the hope of offering it to his department.

*Program new experiences. Some considerations include becoming comfortable with a new professional identity.*

I have a new mental picture of myself as a mentor coach and visualize myself being recognized and paid for my coaching services. As I recall those who have mentored me over the years, I think to myself that now it is my turn to be the mentor coach.

### III. NEW WELLNESS STORY

We are in a revolution in the science of wellness and of aging. We understand how our bodies work at the cellular level. We understand healthy ageing. We can live healthier lives than anyone before us in all of biological time. This has taken a while because health is biologically more complex than disease.

Warren Buffett used the analogy of buying a car. If you get a new car every few years, you'll take a different approach from the approach you'd take if you knew you were going to choose *one* car and have it for the rest of your life. In the latter case, you'd do research to know the best care for that car, probably change the oil more frequently, and do everything possible for maintenance. Knowing that it would be your only car for the rest of your life, you'd take meticulous care of it.

Your body is the only one you will have for the rest of your life.

#### The Mindset of Wellness

Wellness is a mindset. This mindset gives ownership of a life story of wellness to the individual. With this ownership comes the responsibility—and privilege—that each thought, feeling, experience, and behavior is created each moment.

Recognition of the authorship of your wellness story includes awareness of the processes and behaviors of mind, body, and soul. This authorship includes the physical, emotional, and spiritual patterns that you engage on a daily basis. It means recognizing true needs and distinguishing them from wants.

- ***Mind*** includes constructive and creative use of your mind, knowing and living up to your ideals, maintaining a loyalty to your ideals, and nurturing close relationships.
- ***Body*** includes making the choices that are in your best interest; informed, consistent pursuit of nutrition, exercise, and safety.

- ***Spiritual*** includes self-awareness and nurturance, meaningful endeavors, expression of feelings to others, and asking for and getting what you need.

Wellness integrates mind, body and spirit with a balanced flow of energy. It is an ongoing process of choices that become the stories of our lives. Attention to wellness integrates mind, body, and spirit in an approach to abundance and to wealth.

### **What Is the Need for Wellness Coaching?**

People don't need more advice about vitamins, or to be told again to exercise, lose weight, or stop smoking. They often don't do what they're told, even when they pay to be told. As Jeff Kindler, immediate past CEO of Pfizer, has observed, "The percent of prescriptions that get *filled* is about 50%." And less than 50% of those filled are not complied with accurately. Fewer than 1 in 4 people actually follow through. Those who do are doubly motivated: they are scared by a symptom, and they pay an expert for advice. What's missing? They need to make wellness their own story, to own it.

People need a clear, specific, stepwise program for change, and an informed guide to help them. They need an accountability partner who is an expert at change.

### **Why Is Change So Difficult?**

In studies of coronary bypass patients whose lives are at risk unless they adopt healthier lifestyles, how many do you think change their habits? Only one in nine.

It took Ignaz Semmelweis more than twenty years to persuade doctors that washing their hands could save the lives of women giving birth. He had the data—the proof—but that wasn't enough to change minds. He died before people believed and changed.

Changing behavior is difficult. What keeps people from doing what they need to do for themselves? What makes it difficult for us to change, even when

someone's life depends on it?

Data show that driving while texting is more dangerous than driving while drunk. How many people does that stop?

Some of the resistance comes from staying in a comfort zone of the predictable and familiar. Another component of resistance is that our brains resist change—they're programmed to operate on the default mode of repetition.

You have to own your wellness story. When the light on the dashboard appears that says "service engine now," if you go under the dashboard and pull out the bulb so that the light won't shine, it creates an artificial sense of satisfaction that nothing is needed. Another term that features in resistance is denial. But once you know something, you can never not know it again. Denial is still a form of engagement, even though invisible above ground. People are afraid to go to the doctor, but they aren't afraid of doctors. They're afraid their denial will be confronted.

Making a physical symptom go away does the same thing. The symptom is the signal, a story in itself, a story needing and begging to be listened to and understood. If you ignore the symptom, your body will simply find another way to bring you more information.

The Tao teaches that the source of spiritual energy is physical, rooted in the base chemistry of the body. Self-cultivation refines this energy for spiritual attainment. Enlightenment is a psychophysiological achievement, a state of being rather than intellectual understanding. Spirituality is an expression of energy.

## NEW WELLNESS STORY ROADMAP CASE STUDIES

### A Wellness Love Story

Karen Hamilton, RN

The personal wellness (and success) Case Study using the ROADMAP System that follows is a love story, based on truth and the joy and suffering of life.

#### *Recognize authorship.*

If you have ever suffered at the hands of another human being, you will know it is hard to forget.

Circumstances in my current life caused my post-traumatic stress disorder (PTSD) to hit me aside the head and dead center in my gut. I was undone. Given that I am an expert-level board-certified holistic nurse, I recognized the classic sentence screaming in my mind, “I thought I’d be over this by now!”

I wasn’t.

I thought I had managed to “put away” my intense horror, fear, and feeling of helplessness.

I hadn’t.

I was aware that for years I had authored my own story based on repeated victimizing violence. A menacing man, had shoved his fingers into my nostrils, threatening, “Up your nose with a rubber hose! You have no power, so don’t pretend you do!”

My mind reeling, my eyes tearing, I didn't believe him entirely. I had the power to love. But then and there most of my creative ability and self-confidence died. I began to live this lie. What I thought and felt, because of what I believed, became my reality.

I wanted no new editions of this same old story. Dave Krueger encourages an exercise called Calibrating Intuition. In a very present moment, I said “Yes” to helping myself. My professional and personal life had been deeply rooted in caretaking. But caring for myself created intense anxiety.

My core identity that transcends all roles and relationships is that of being a child of God. As such, I chose to walk in love, not fear. I needed to be honest

with myself (my top ideal: honesty) and admit that fear was rampant.

### *Own your story.*

I chose to own the fear and convert it to the intention to take care of and love myself. I chose to make old assumptions (and lies) a memory rather than a currently lived experience. It was a matter of health and being well.

The external obstacle of abuse and resultant PTSD had been stand-ins for an internal sense of unworthiness. My point of reference needed to shift, and I needed to become my own hero.

I had previously studied holistic health in order to manage my ankylosing spondylitis, a degenerative disease. I became my own authority and am now mostly pain-free, in contrast to the previous decade typified by medications and debilitating health.

The physical and emotional symptoms of PTSD were asking me to create a new story: I am no longer in danger.

My life had many accomplishments, but I was still experiencing unwanted PTSD symptoms and wanted to move from anxiety to peace—to alleviate not only the suffering of others, but my own as well. This was my wellness goal.

I decided to commit anew to my health. I designed a plan that would honor my own uniqueness, needs, and values.

I knew instinctively what my next best action would be. And I knew I could trust myself.

### *Assess plot and storylines.*

We live in a very goal-oriented culture. This is okay so long as the goal aligns with one's ideals and needs.

Doctor Krueger states, "Ideals are internal standards of excellence."



A need is a necessity for body, mind, and spirit.

Trauma had left me with PTSD. I had a terrible need to feel safe and to stop letting the manifestation of the symptoms of this condition derail my life. My ideals of honesty, creativity, and freedom had stayed the same throughout my life. However, the belief that I had accepted powerlessness did not align with who I actually knew myself to be. The storylines and the plot demanded serious reconstruction.

I had lived and protected my ideals. I had maintained my own integrity and been true to my ideals, even though I had believed and/or accepted a serious lie, namely, that I was powerless. It was only when I recognized, examined, and clarified what was true for me that I understood I had accepted a lie. I thought that because I had loved, I was not powerless. But I was living a limited story of love, a story that lacked love and appreciation of myself.

My goals of recovery from PTSD, to know God, to know myself, and to love well needed to be expanded and restructured. I needed to love myself by not perpetuating a lie of powerlessness.

*Decide what to change.*

I needed a map to outsmart my brain. My prefrontal cortex said one thing (logical thoughts), while my limbic system was screaming, “Run! Freeze! Get out!”

I needed to take action to diminish preprogrammed responses. I needed new experiences and a new story to replace the old one.

Enter Simchah Midrash—a Labradoodle puppy. I named her with intention; her name means “gladness story” in Hebrew. The new script of my life would be a gladness story. Authorship is a self-determined process. As Dr. Krueger stresses, “You have to be in a new story before you can give up an old story.”

As a registered nurse who “knew all about” PTSD, when I directed myself toward informed change, I had to acknowledge where I was and decide where I wanted to go. Yes. PTSD to peace. Destruction to construction. Fear to

love. And I figured out how to get there.

Why did I need permission to accept what I already knew? I would be healed by the presence of and relationship with this beautiful dog. I believed it, and hence I attached meaning to my belief. “Beliefs drive behavior. Behavior drives performance. Changing your mind changes your brain and life.” (Krueger)

Simchah had the ability to live in the moment. I learned by watching and doing. Days passed. In one moment, everything changed. I felt the shift in myself. I was wholly present to now. The moments were gladness to her. She became my life coach. Simchah emanated the definitive difference between thinking, “Oh, no! It’s happening again!” and “I’ve got this!” (wag, wag)

I consciously chose to change anxiety to awareness, and inability to pay attention to intention to be attentive. What I wanted to change wasn’t there until I created it. All I had to do was watch and follow the dog. She lived in the now and paid attention.

I decided to construct an altogether new and glad internal climate. My inner critic, reminding me of unworthiness, became my inner coach, whispering hope and happiness as mine.

### *Map changes.*

I recognize that I decided what to perceive. I also decided what meaning to give my perceptions. And I decided what the associated behavior would be.

I changed three things of vital importance.

1. I added Simchah Midrash to my life.
2. I determined that my internal point of reference would be to accept myself as fully as this puppy accepted me.
3. I would become more of myself.

When the dog plopped herself at my feet and searched my eyes with hers,

I suddenly found myself crying. When I gave myself permission to cry out loud—to wail, as a matter of fact—I began to heal and the calm came.

She looked and looked. I was reminded of a scripture describing Jesus as he stepped out of a boat. He saw—he actually looked and saw—the people, and his heart was moved with compassion. I scooped up the puppy and I instantly knew the meaning of the phrase, “I am self compassion in action.”

I was present with my gladness story, literally and figuratively. I felt my own insides, rather than thinking of the outside of anyone else in this situation, and I was happy and calm.

*Author new experiences.*

The storyline that I had created was shadowed by powerlessness. Even though I had demonstrated strength and success in my outer world, my inner self felt shattered. I wanted the joy (my strategic goal) moment by moment of this madcap puppy and the peace of her doggie sleep.

Because “we don’t see things as they are, we see things as we are” (Krueger), I felt hopeful and calmed by what I saw in Simchah Midrash. Life’s not static. I was changing. She was changing. And we collaborated, this pup and I. We looked at the same scene together and played, sat, and worked on common ground: being in the moment. I was training her to be a therapy dog. I was training myself to do more of what was working: being in gladness, feeling safe, setting my own goals, creating my own vision, and writing.

The dog’s presence was a solution, an agenda of my own. I created the answer to my own wants and needs and was experiencing mastery over my own states of mind. I chose to remember that even intelligent people are undone by PTSD. The balance becomes imbalance.

I consciously changed my brain’s software from powerless to powerful. I was creating new patterns of health and wellness.

I recognized that I was safe. I didn’t want today to be yesterday. That became my conscious mantra, as I mapped out simple changes stroking the dog, feeling my feet on the ground, avoiding triggering people, setting boundaries,

journaling, praying and walking in nature, pausing to feel my own breath, taking a pause at all.

Wellness requires self-awareness, informed physical care and a body, mind and spirit balance, with self-ascribed meaning to what matters.

I wholly believe it matters what we do, to others and ourselves. I had a goal and a time limit. I pretended I'd taken out a 90-day protection order against myself. This was my map. My goal was gladness, peace, and to nurture and protect myself.

This activity helped me determine who I am: a child of God, living in love.

*Program new experiences and identity.*

Who do I say I am? I am one who wants to know God, to know myself and to love well. To alleviate suffering in others and myself. To look outward and inward and to know and feel my own heart moved with compassion.

To be healthy in body, mind, and spirit. To live as if I believe what I say. To be whole. To not only envision a true gladness story, but to embody such a life. It is within my power to create a story worth living. A story of wellness and success.

A story of my own.

## **Addendum**

We are most broken and most mended in our most private moments, when we know what we know. I always told my children this: We cannot know what we do not know, and we cannot not know what we do know.

We know how far we are from where we want to be. And we know, hopefully, the possibility of creating something new.

A new life story.

In a well-known quote, Maya Angelou stated, “There is no greater agony than bearing an untold story inside of you.” Surely, that statement resounds with truth. Equally sad is the lack of belief that we can and do create our own life story. As much as counseling, therapy, coaching, etc., has helped me to become more of myself, it is my belief that my works were created before time, that I should walk in them. This involves living, moment by moment, a new life story.

## **Mentor Coaching: A New Wellness Story**

Jaymie Meyer

### *Recognize authorship.*

Thirty-eight-year-old Janet (not her real name) came to me for coaching six months after leaving a physically and spiritually demanding job as a truck driver. Having spent the last several years feeling unfulfilled, she was eager to take responsibility for her next choices, whatever those might be, but felt unclear as to her next best steps. It was especially important for her not to revert back to her old ways, as she had recently celebrated six and a half years of sobriety. It was at this juncture that our work began to create her New Life Story® of Wellness and Career.

### *Own your story.*

The first step in our process was to gain an understanding of her story and to take that all-important ownership. Feeling proud of her years of sobriety, Janet acknowledged the toll that drinking had taken on her relationship with her parents. She also acknowledged that since she had become sober, her relationship with her family, especially her sister whom she dearly loves, had vastly improved. She recognized the fact that she would like to continue to nurture her family relationships, but she also had a deep-seated desire to explore what it could mean to be of service in the community. She liked the idea of learning how to help others avoid becoming stuck in negative behavior.

### *Assess plot and storylines.*

As we continued to explore Janet's dreams and desires, she recalled her most vivid and inspiring memories—memories from her college days when she did regular workouts with a fitness instructor. These sessions left her with an increased sense of strength and well-being. Looking back, she recognized that she had also enjoyed learning about nutrition. These memories provided a valuable touchstone for her New Life Story® in the areas of wellness and career.

Acknowledging her tendency to start something with much enthusiasm but

then quickly lose steam, Janet felt receptive to the coaching concept of a ROADMAP in helping her develop and realize her New Life Story®.

*Decide what to change.*

During our weekly coaching sessions, we explored both her short- and long-term goals. These included increasing her daily physical activity and striving to eat healthy, nutritious foods in support of optimal well-being. Additionally, Janet agreed to purchase a pedometer (or use a pedometer app) and committed to walking 10,000 steps, five days a week.

During coaching sessions we explored ways for her to stoke her motivation daily. A visual person who loves inspirational writing, she often posts meaningful quotes on message boards she creates. To that end, we crafted a daily mantra, which Janet posted and reflected upon each morning: “What can I do today that will put me in a better place?”

Another important goal for her was to quit smoking. Since she had smoked for many decades, I suggested she make an appointment with a medical professional to determine if she was a candidate for a nicotine patch or gum.

Looking at all these dreams and desires allowed her deepest goal to surface: earning a degree in fitness, harking back to her cherished college memories. She then set an intention to make an appointment with an advisor at the community college to explore opportunities there. She also expressed the objective to locate a gym nearby to pursue her fitness goals.

*Map changes: goals and success strategies.*

The cumulative effect of our weekly sessions and the ROADMAP helped Janet make great forward strides. In support of her goals, she met with an advisor at the community college to discuss enrolling in an associate degree program in fitness.

When Janet mentioned her interest in finding a gym, the advisor told her about an affiliated program between the college and the local YMCA. Janet then made an appointment with the Y to apply for their program.

Following through on our discussion about mapping her next best step for quitting smoking, she consulted with her healthcare provider. At that point she was introduced to a nurse practitioner who was starting a smoking-cessation program, and within the month Janet had enrolled.

Enjoying frequent walks in support of her fitness and nutritional goals, she introduced herself to the community organizer of the local farmers' market and shared with him her interest in wellness and nutrition. She was subsequently invited to take part in the community's free healthy-cooking classes. After signing up for these, Janet felt so grateful for their support that she then asked if she could help them by volunteering at the farmers' market. She felt pleased that they were receptive to her offer.

#### *Author new experiences.*

After committing to the smoking-cessation program, Janet understood that previously unimaginable opportunities suddenly became available.

Excited at her progress, she then enrolled in the fitness degree program at the community college and felt eager about beginning her studies in the fall. Her advisor, who is also the director of the program, offered to mentor Janet, for which she felt deep gratitude.

Her referral to the YMCA by her advisor led to a four-month free membership in a pilot program. During this time, she will be monitored monthly for both her blood pressure and weight loss and also participate in a supervised support group.

The smoking cessation program at her doctor's office has likewise provided Janet with an ongoing connection to a support group that she considers part of her "family." She is now experiencing a steady sense of growth, connection, and community in many areas of her life because of her clarity and focus.

#### *Program new experiences: incorporate and sustain the changes.*

Janet's new identity as a person who supports others in the areas of health, fitness, and wellness continues to unfold. Her self-esteem also



continues to increase as she collaborates and connects with like-minded individuals. She now understands that when she felt stuck in the past, it was because she had no ROADMAP to keep her on the right track to accomplish her goals. Janet enjoys a much greater sense of self-awareness and, more importantly, increased empathy and compassion for herself. Striving to stay consistent, she works to accomplish a little each day. All her collective efforts keep her moving in a direction to support her goals.

One of the most important breakthroughs she experienced is the awareness of how important it is to take care of herself first. Janet continues to inspire me as she draws inspiration from the writing of Wayne Dyer, posting his quote, one of her favorites, on her home message board: “If you wish to accomplish something, you must first expect it of yourself.”

## **Addendum**

At a recent six-month coaching check-in, it was evident that Janet is flourishing. She reported that she has successfully completed her first semester of a professional degree program in fitness at her community college. She has a close relationship with the program director who has continued to mentor her. I feel Janet deserves much credit for seeking out positive role models to help her on her journey.

From our very first coaching session, I felt moved by her desire to help others live a more fulfilling and healthy life. Throughout the process of our work, she resonated to the concept of how easily people can and will revert back to a previous story if their new identity has not been well established with a ROADMAP. While Janet occasionally feels self-doubt, she writes, “This is a great opportunity for me to practice being great at something. I remind myself daily that even though I have a long way to go, I am moving forward one step at a time.”

## **A Holistic Wellness Story**

Sharon Jentzer

*Recognize authorship of your wellness story.*

I looked wistfully out over the shimmering Pacific Ocean just beyond Southern California's stretch of Interstate 5. A few years before, I had stood watch on the bridge of a U.S. Navy ship, looking out over a 360-degree infinite expanse of the Indian Ocean, and I was anything but wistful. Back then I was filled with joy, pride, even serenity. I had forged my own path to get there, defying the stultifying stereotypes of the 1970s to become a surface warfare officer in the world's greatest navy.

That was my story, but it felt like some far-off fairy tale as I spent two hours every day commuting to an office job along with the million other residents of San Diego. This wasn't at all the life I had envisioned for myself. How did I get here?

*Own your story.*

My life suddenly took a turn for the suburbs when I bought a house, with an attached mortgage. Then I realized that my weekends were now consumed with maintaining a perfectly coifed yard. I hadn't even realized how far I had drifted away from my ideal life until I awoke sitting in the middle of gridlock, coming home from the job I needed to pay the mortgage on the garage full of gardening tools. I dreamed of someday retiring so I could travel and spend my days doing what I wanted, instead of working outrageously long hours as a software engineer and watching my domestic chores pile up. I daydreamed about my next vacation and a distant retirement, instead of loving my current life. It didn't take too much analysis to figure out that I had tossed away my dreams with each choice I had made. Now, as I careened toward middle age, I knew I would never be comfortable living the classic American dream. Who was I kidding? If wanted to be truly happy, I would need to embrace my own quirky sensibilities. I didn't belong in the suburbs.

*Assess the storylines and plot.*

Maybe I wasn't ready to quit my job and live in a tent in the wilderness with my trusty miniature poodle, but I did need to figure out what I wanted my life to look like. What were the income streams? What did I need for my pup

and me to live comfortably? How did I want to spend my time? And last, but not least, how was I going to get rid of the fatty saddle bags that had taken up residence in my thighs?

*Decide what to change.*

I was nothing if not responsible, so walking away from my job and my debts was not an option. I could, however, stop spending money that didn't contribute to my ideal lifestyle. I could also add a passive income stream to my financial portfolio, by renting out the two spare bedrooms I didn't use. If I really wanted to spend less money I could eat at home. What do you know, by spending a little more creative time in my own kitchen I could save money while eating healthier. By really taking stock of my life—the whole package—I could live a more authentic life, the life I really want to live, and lose weight to boot. I could choose to spend my time and money on what's really important to me, spend more time doing what I really want to do, and enjoy side benefits such as less financial stress and better health. Why did it take me so long to figure this out?

*Map changes.*

Besides getting more comfortable in my kitchen, I decided to get back in the water. I had been driving along the Southern California coast my whole adult life, yet I hadn't been to the beach in more than a decade. My first priority was to get back to my roots with water.

*Author new experiences.*

The next weekend I took my trusty pup to dog beach, and we both had a blast. Running around at the water's edge and loading up on Vitamin D, I was definitely on the right track. Next up: getting in the water.

I grew up snorkeling with my father, and for one year as an adult I snorkeled every weekend with a friend. That came to an abrupt end when I was recalled to active duty to spend time along another coastline for Desert Storm. By the time I got back home, my friend was immersed in a doctoral program, and she didn't have time to swim with me.

I decided to take up SCUBA diving, because it would be easier to join a dive club to find a SCUBA buddy than to find a snorkeling buddy. I know it sounds strange, but there are dive clubs everywhere. When was the last time you saw a snorkeling club? So, that's that. A quick flip of the Yellow Pages

(this was pre-Internet) and I had located a dive shop with a class starting soon. Before I knew it, I was posing for my Open Water SCUBA certification card. It didn't take me long to meet a few people who would become my dive buddies for the next few years. Thereafter, every weekend when I wasn't fulfilling my Navy Reserve duties, I was at the beach (mostly under the water).

I was on a roll. I had always wanted to live in San Francisco, so my next project was to get a job up north and relocate to the city and reclaim my heart. Living by design felt so much better than muddling along by default.

*Program new identity to incorporate and sustain the changes.*

I had found a job in San Jose, in the heart of Silicon Valley just south of San Francisco, and everything seemed to be going my way. I learned to sail and joined a yacht club to have regular access to a sailing community. I regularly dove with two dive clubs in the Bay Area, and I loved my new job, writing software for a large international corporation.

Just when I think I have something all figured out, though, life happens. Two years after my move to Northern California I was recalled to active duty after the 9/11 attacks. This time I was sent to Washington, DC, and with the nearest open-water diving a few hours away, I spent little time diving during that tour of duty. However, I did join a sailing club out of Annapolis and took advantage of every opportunity to dive when I found myself in Monterey or San Diego for conferences. I even managed to use some vacation time to meet up with a dive buddy from San Diego for a ten-day dive trip off Cocos Island, where we hung out with hammerhead sharks. So far, I was still living true to my spirit.

## **Addendum**

This is my story. I didn't set out to write a money story, although it probably reads like one. I see it as a holistic wellness story. I feel whole, happy, and healthy when I live authentically. Actually, I could see this story fitting in to any of the categories except the relationship story. I think my most compelling story is really best categorized as growth, such as overcoming self-limiting fears. Just about everything I have done is a story of overcoming fear: fear of swimming, fear of sailing, fear of moving away from a city I call home to a new city to start over, etc. I didn't dwell on fear in telling my story, but it was definitely present. It was even there in my story of joining the navy and embarking on a seagoing career path.

Life happened again while I was temporarily stationed in Washington, DC. I met a man who worked in DC, and any plans I had of resuming my life in California ended with wedding bells. Now I had to redesign my ideal life. Sometimes it feels like the movie “Ground Hog Day” all over again: I now live in an even larger suburban house with a manicured front yard, and not one, but two dogs and two cats vying for my affection. This time around I didn’t waste any time living by default. I went right to work figuring out how I was going give my free-spirited West Coast sensibilities breathing room in a conventional, suburban East Coast culture.

For starters, when I sold my townhouse to move in with my husband, I invested in rental properties to establish a passive income stream. We also rent out two spare bedrooms for another income stream. When the new Veterans GI Bill passed, I let the navy help pay for my doctorate of health education degree. I developed my dissertation project to become a home-based business venture so I can work flexibly, without a commute.

I have discovered that living by design is a lot like gardening. If you don’t pay attention to it, you’ll look out one day to find the weeds have taken over. You don’t have to be a master gardener to have a beautiful garden, just get rid of what’s not working for you by pulling the weeds and purposefully choosing what to plant.

## **A Medical Professional's Journey to Wellness**

Carl Arrington

The following is a summary of an individual's work using the principles of the ROADMAP for a New Life Wellness Story®. He is a medical professional going through career and family relationship story revisions.

### ***Recognizing authorship.***

A man we'll call Will felt that his whole life was in turmoil—financially, professionally, and relationally. Ever since childhood, he had felt rejected by most of his family except his oldest sister. He longed to be accepted and respected by them all. He thought that academic and professional achievement would earn him the respect and love he sought. However, it seemed to have the opposite effect. Instead of commending him on his accomplishments, his family members viewed him as thinking better of himself than of them. The only use they seemed to have for Will was as a source of financial help in their times of need.

He finally realized that much of what he was experiencing was the result of his own complicity in enabling the dysfunctional relationship with his family and the actions and attitudes that he himself projected. He had always seen himself as the unjustly treated victim of life and his family.

### ***Own your story. Accountability is a prerequisite to change.***

After reviewing the state of his life and reflecting on decisions he had made, especially in trying to curry the favor of family by giving them material things, Will came to the painful realization that much of what he was experiencing was the result of his own actions, attitudes, and decisions and his ways of interacting with others in all areas of his life.

### ***Assess plot and storylines. Recognize the behaviors, hidden messages, and***

*elusive language of mind and emotion.*

At one time very successful in making money, Will had always seemed to find employment on his own terms. He was good at saving money, closely watching what he spent, but able to live a lifestyle in which he could buy what he wanted. For quite a while he was so positioned professionally that if he didn't like the way things were going at his workplace, he simply left and was able to quickly find employment elsewhere.

Because he really disliked working for others, he finally sought ways to become self-employed and went into real-estate investing. However, during the economic crash of 2007-8, he was unable to hold onto two of the properties he had bought, and they went into foreclosure. As his financial fortunes took a dive, Will lost just about all he had managed to save over the years.

When he went back to seek employment with agencies where he had previously worked, the negative way in which he had ended some of those relationships made finding sustainable employment difficult. In the midst of this, his family relationships deteriorated further, as some family members continued to expect financial assistance from him, disbelieving that his financial fortunes had taken a turn for the worse. Will felt a sense of desperation closing in, to the point that he began to have to cut back on spending in ways that had not been necessary for years. Now filled with fear and uncertainty, he began to wonder if he would ever be able to turn his life around, especially in view of his need to make serious preparations for retirement.

*Decide what to change: Make informed choices about what story components to keep, let go, change, and enhance.*

As Will reflected back on his life he began to increasingly acknowledge his complicity in creating his life situation. His fear of failing meant that for five years he had postponed sitting for an exam that could have led to credentials for practice at a higher level in the medical field and potentially increase his earning potential. He also recognized that his house had become

so cluttered with unnecessary items it could easily be viewed as the home of a hoarder.

Upon reflection, he saw that all of these obstacles to progress stemmed from his fears and need for something in life to take his mind off his insecurities and deep sense of loneliness. He decided to stop going to his favorite thrift stores unless he really needed something found there. Instead, he would secure a trailer to pack in all the items he didn't need and donate them to charity. He would move out of his house, rent it, and find a small apartment to reduce his housing expenses. Beyond those major steps, through someone with whom he still had a good relationship, Will was able to find a job and a connection to those who still cared about him.

He understood that he would have to set aside time without distraction in order to prepare for the professional exam that could increase both his earning potential and the probability of higher-paying employment to help him reach his financial goals.

When it came to family, he resolved to observe stricter boundaries and refuse to be drawn into their dysfunction and efforts to control him. Reminded through reflection of how in the past he had turned to his trust in God to provide for him, Will saw that God had indeed always opened doors of opportunity for him. He was reminded to tap into that awareness again and consider the fact that because God loves him and had provided for him in the past, surely God would open doors for him in his present situation.

*Map changes. Goals and success strategies.*

Once he decided to put his remaining rental property up for sale, Will enlisted the help of his older sister to lead him through the process. He set aside time each day to clear out a roomful of items he won't need in his new apartment. He continues to check in with me to keep me aware of his progress. He's negotiating a contract to teach in the university town where he plans to relocate once his house is empty and working on arrangements with the person who will rent it. He is also addressing some health issues that need attention.



*Author new experiences. Create the new wellness story you desire.*

Will knows now that he can create the kind of life he wants. He can look back at his past and see how successful he has been, especially in achieving financial goals once he really sets his mind to it. He also remembers having felt the support and love of God in helping him achieve his previous goals. He will remind himself that God loves him and that this love can be the source of his self-esteem, rather than depending upon the opinions of his family. He also plans to seek out friendships that are affirming and life-giving. In addition, he has decided to create a care plan that will address his physical, emotional, mental-health, and relationship needs.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

Now that Will has decided to claim his identity as a child of God, he knows that in times when he may feel unable to depend upon others he can trust that God will be with him to guide him as he seeks to live his new life story. Rather than dismiss the opinions of others, however, he will first listen, then reflect on the conversation to see if it might be a way in which God is guiding him and opening up doors of opportunity to a better life. He will set aside the time he needs to prepare for his qualifying exam. He will maintain an awareness of the time and money he had spent on activities that were distractions, ways to avoid the real issues facing him. Instead, if he engages in these activities hereafter, it will be because he truly enjoys them and not as ways to cover the pain he may be feeling.

## **A Parkinson's Wellness Story**

Carol Cueroni

We'll call the 41-year-old client in this next story Alex, though that's not his true name. Alex is going through a wellness transformation to create the new life story he needs to figure out his next steps. Diagnosed at age 40 with early-onset Parkinson's disease, Alex was forced to leave a career of more than twenty years that he loved. He took a much lower-paying sales job in electronics to get insurance and tried to start a new and physically less demanding career. His illness progressed rapidly, however, to the point that he had trouble performing his new responsibilities, and he was soon fired.

Although Alex was extraordinarily intelligent, he became stuck in a state of depression and dismay over how this disease had paralyzed him and changed the life that he had loved for more than two decades. He had no family support; he was in need of help to accept where he was and create a plan for a better life. So we began to co-create a plan for his new life story.

### ***Recognize authorship.***

You are creating your new life story wellness from knowing you have choices about your body, how you can care for it and improve your health. Knowing you don't have complete control when you previously thought you did and were dealt a very bad-luck deal for life.

I am now present and aware that I am the author of my wellness path, even though my disease is not something I can totally control.

### ***Own your own story: accountability is prerequisite to change.***

Now I can own my own story, even though it is very painful to acknowledge that my current physical condition is due to a genetic predisposition for early-onset Parkinson's that I can't control. I also have to accept that I had to give up my lifetime dream job because of my physical condition. I enjoyed excellent health and a very successful career until the age of 38. I accept that I can no longer do my dream job. I took a lesser job in sales to support myself. Not being aware of this illness, I had no plan of action. Internally, I felt I was given this disease as punishment for something.

I had a great, full life before. After my diagnosis I withdrew into myself, embarrassed to talk about it. Through fear of judgment and isolation from

family and friends, I did not seek the right help, which in turn made my condition worse. I did not want to accept what I had. I believed it was just not true. I was not my own health advocate. I was not taking a proactive approach to my situation. My health declined quickly. This led to the loss of my new sales job.

**Decide** *what to change: make informed choices about what story components to keep, let go, change, and enhance.*

I had to decide to go on disability in order to care for myself. This devastated me mentally, beyond my own ability to help myself. My family was not supported. I felt disgraced by my condition and all alone. I did not seek help at the right place for my condition or from the right doctors. I do need to seek the correct help for my condition and become my own advocate in those areas of life I can control.

**Map** *changes: goals and success strategies.*

Meet with new doctors who specialize in movement disorders and start a vigorous new treatment plan. Be accountable for improving my physical and mental health in areas I can control, making my own difference in my life. Be assertive with doctors in letting them know I don't want to let this disease define me. I want to live the best life possible. Seek help from doctors to get into clinical trials in hopes of symptom improvement. Find supportive groups of people with the same conditions to collaborate with them.

**Author** *new experiences to create the new money story you desire.*

I am a man who can impact my own wellness by staying accountable to my new goals to improve my life through what I can control. I am allowed to live a life of the best possible physical and mental wellness without limits from my old beliefs. I seek out people who want to support me in my new wellness story and others having similar conditions. I talk about my story with friends and family and others in hopes of helping others choose to make their own difference in their life.

My identity is now one of who is in control, an awareness of my ability to change what I can be in control of, even though my condition is genetic. I can do this through continuing to seek out the help I need from doctors, friends, research, and education. I will start with my new doctors and a treatment facility that supports my needs. I will be accountable daily for eating a well-

balanced diet and following an exercise program to improve my health.

*Program new experiences and identity. Incorporate and sustain the changes by corresponding internal growth.*

My identity will include having chosen to make a difference in improving my life without limiting belief. I have moved to a town closer to a rehab facility that specializes in my disease and am participating in the program daily. I will live my life to the best of my ability to improve my longevity. I will experience a new sense of peace, knowing I am in more control of my health.

*Own your own story: accountability is prerequisite to change.*

Now I can own my illness, even though it is very painful to acknowledge that my current physical condition is due to genetic predisposition for early-onset Parkinson's, something I can't control. Also, that I had to give up my dream job because of my physical condition. I enjoyed excellent health and a very successful career until 40 years of age.

## Health Plan Work Pages

Alicia Boyd Johnston

The following is a work page completed by a 55-year-old professional woman who has struggled with weight and health issues for twenty-five years. She worked on ROADMAP for a New Wellness Story® in the revision of her wellness story.

### *Recognize authorship.*

Previously I believed that all my health problems were the result of something that I was born with, and that I was destined to suffer from obesity and pain. I felt victimized. I now see that I am the author of my wellness story and not just a character in the story. This has given me so much hope.

### *Own your story.*

When I finally admitted to myself that I was responsible for the poor state of my health, it was very hard. When I finally said “I have pain or I am overweight because I have made many wrong lifestyle decisions,” for the first time I owned my story and was at last ready to move forward.

### *Assess plot and storylines.*

I have been between 50 and 80 pounds overweight for the past twenty-five years. As a result, I have had one health problem after another, not to mention chronic fatigue and depression. My doctor has told me that unless I lose the extra weight I am cutting my life short, yet I still have not lost the weight. I began to put on weight during my marriage (which ended in divorce twenty years ago), and my weight has climbed ever since. Although I have managed to lose 5-10 pounds here or there, I always regained that weight and then some. I always had a great plan: well-thought-out nutritional intake and calories, scheduled exercise, and I would make a great effort—at first. Then the demands of my job would intrude. The demands of family, friends, and close acquaintances would intrude. I would let them intrude. I would not establish boundaries between myself and others.

I would not say “No” even when it was reasonable and rational to do so. I am seeing that I do not want to disappoint others. I have known for many years that this has been an issue in other areas of my life, but I am only seeing this in the area of my health now. I am also seeing that I don’t manage my time

effectively, allowing someone else to make demands on how I use it. I do this at the expense of my own self and my health.

When I would become busy, I would eat on the run, grabbing whatever was handy and using the excuse that I “had to eat something.” My food choices were terrible, but I always rationalized them. It was easier to excuse the problem than to change.

Over time, I allowed the pain in my body to keep me from exercising regularly, and I began to suffer from insomnia. I started to believe that all the trouble I was experiencing was genetic. I convinced myself that asthma, diabetes, neuropathy, and obesity all ran in my family and used it as an excuse to stay stuck. None of these things run in my family! I take care of others but do not take care of myself. I do not value myself.

### *Decide what to change.*

Keep work ethic and commitment to work, as my work is definitely a part of my life purpose, but learn to develop balance between work and life. Establish boundaries with others. Upon reflection, a core problem is my lack of caring for myself, and I can begin to change this by showing myself that I am important. I will do this by making scheduled time for exercise, meal-planning, and mindfulness practice a non-negotiable. I will say “No” to non-urgent matters. I will learn better time-management practices. I will tell those close to me and those I work with about my personal wellness goals and challenges and ask them to help me stay accountable. Change the constant need to please and understand that it is okay if some people are sometimes disappointed that I am not available 24/7. Stop the self-reward/self-punishment cycle that I see I engage in with food, by finding healthy ways to deal with stress and success. Let go of the genetics script.

### *Map changes.*

Use Outlook calendar with iPhone to book workouts and meals and make it an appointment the same as all other priorities in my day (already started). Shop for fresh groceries twice weekly when I go to town for my supplies, so that I always have what I need to eat healthfully; no eating on the run (already started). Explain my situation and goal to lose the weight and improve health at next staff meeting and ask for accountability partners at work; let them know about times through the day when I will not be available and expect both them and myself to respect this. Make a list of other rewards or comforts I can turn

to instead of food (such as journaling or swimming) for those times when I am likely to stumble.

*Author new experiences.*

I deserve to be healthy and enjoy wellness. I am able to lose the weight and reduce my physical pain and decrease the amount of prescription medication I will need. I am equipped with the knowledge and ability to create a healthy body and have healthy relationships with others who love and support me in reaching my goals and who have similar goals. I am able to find those who can help me achieve my wellness aims and will focus positively through my actions, words, and thoughts on achieving health and be aware of when I am out of alignment with my aims to stay on track.

*Program new experiences and identity.*

I will be vibrantly healthy, a wellness advocate for myself and others. I will learn as much as I can about nutrition and exercise for weight loss and optimal health so that before I make a decision about a food or workout, I am fully aware of what the consequence of eating that food or missing that workout will be on my body and on my goal. I will have more energy, better sleep, a greater quality of life, and increase in my self-esteem. I will be more effective in my work. People will begin to ask me for advice when they have questions about improving their health and wellness. I will be a role model for improving health outcomes in my community. I will finally feel and know that all is well.

## **Addendum**

I absolutely could not have finally begun the important process of changing my health without the ROADMAPfor a New Wellness Story® program. Over the many years I have struggled with my health, I have tried everything to overcome the challenges I have faced and could never quite get any momentum or gain any ground. After each failure, I felt more defeated and was more perplexed than ever about what I should do next. I was ready to give up.

Working through the ROADMAP opened my eyes to how my thinking

about my problems had become stuck in negativity. I had come to accept my thought pattern as normal and my life as “just the way it has to be,” but as I started reflecting on my thoughts and then my behaviors, I realized that I was solely responsible for my situation. That was at first disheartening, but then empowering, because if I was responsible for the unpleasant situation I found myself in, I was also capable of changing it. Imagine!

The process of working through the ROADMAP also illuminated some limiting beliefs I had about myself and others that were just untrue. I no longer need to suffer as a result of anyone else’s choices or as a result of my own unless I decide to do so, and I am more aware of everything I do that either contributes to a poor state of health or contributes to a positive state of health. And I’m losing the weight. I can make better choices as I now know that I write my own story.



## Passive to Active Voice

Cheryl Hiebert

### *Recognize authorship.*

I have felt like the victim in my life and felt I had no control over the events as they unfolded in my life. I take care of everyone except myself and my needs. I disregard my needs for the needs of everyone else around me.

### *Own your story.*

I realize I cannot go on like this any longer. I have reached my limit. I feel broken.

### *Assess plot and storylines.*

I am depressed and blue. I feel like a small blue marble under a huge pile of Lego. I feel heavy, fragile, and exhausted. I left my work two weeks ago and am on short-term disability for the next few months.

I work with deaf children. I suspect that my partner, who just turned 75, has early dementia and maybe Parkinson's. I just turned 60 and feel old.

My son, in his late 20s, is just finishing medical school and working through his issues but won't seek help. My daughter is still at home at age 25.

I have hit rock bottom. I feel like I have to grieve, but I don't want it to hurt.

I'm not living the life I want or doing what I want. I am the rock. My mom was "June Cleaver" and I feel I have to be the same. My dad always told me to "make nice." I have the need to control and be in control and micromanage everyone.

I want a ROADMAP®, want to feel free of burdens, manage my life in a calm mindful way so it doesn't suck the life out of me.

### *Decide what to change.*

It is okay for me to be on disability right now. I have paid into it for thirty-five years, and I deserve the time off. It is time for me and my self-care. I need to learn to say “No” and set boundaries with my family. I need to let them take care of themselves. I am enabling this dependent behavior by being at their beck and call twenty-four hours a day. I will no longer change my plans at the last minute each time one of them decides he or she is sick as I try to walk out the door. I will get respite care for my partner, to give me free time. I will take time to see my extended family in Boston. I told my daughter, “Take a cab. I’m not driving you.”

### *Map changes.*

I will book an appointment with a specialist and get definitive testing and diagnosis for my partner, instead of playing this guessing game. I need the help of the doctor to get clear on what’s going on. I will see my financial planner and look into early retirement so I don’t have to go back to work. I will work out a plan whereby my daughter begins to take ownership of her own self-care, for example, booking appointments and getting to and from the locations. I will stop harping on my son to get help. I will book some time away for myself.

### *Author new experiences.*

The results came back from the doctor: diagnosis of Alzheimer’s. I have looked into and secured funding to get ongoing daily respite care for my partner, with a plan for the future that includes his family’s participation.

I can take care of myself first. I can say “No” and set boundaries with others. I move from doing to being for the first time in my life. I feel good about my self-care. I have more than enough time to adequately care of myself, take myself out to a movie, and buy new things for me instead of spending it all on my family. I deserve to be happy and fulfilled and in charge of my own life. I give myself permission and allow myself to be in control of my destiny. I will spend time with friends again.

### *Program new experiences and identity.*

I take the time to exercise, to enroll in classes and workshops I have wanted to do for years. I will relish my newfound freedom and make my own

choices. I am worthy of care and deserve love and nurturing too. I allow myself to create new experiences and choose to live this way for the rest of my life. I let go of control and live day to day, moment to moment, filling my own well first instead of tending to everyone else first.

I am cured, I feel like I am walking on air. I feel fabulous.

## **IV. NEW RELATIONSHIP STORY**

### **COMMUNICATION AS CONNECTION: MAXIMS + STEPS**

#### **4 Maxims of Communication**

1. The person who makes a difference in your life is the one who listens as if he or she always knew who you are, and gives it all back to you.

Each relationship combines two individual stories to co-author a new relationship story. The implicit contracts authored by each party in a relationship become unspoken assumptions that can facilitate or derail the relationship. Making explicit the hidden assumptions and implicit expectations becomes a crucial part of communication. To see the point of view of the other and to communicate that understanding, each must respect the other's point of view. Understanding and respect are not synonymous with agreement.

2. The ultimate freedom is not relying on someone else's response to determine how you feel about yourself.

Ineffectiveness of communication, simply feeling that what you said was not heard or registered by the other, may produce irritation or anger. So often the content of the discussion then becomes more intense. The process that initiated the derailment—feeling invalidated—gets lost.

The simple step of repeating to the other what you heard him or her say prior to making your own point validates listening. You are then in a position to be heard more successfully. Your individual responsibility to co-author a mutually satisfying relationship includes:

- Mutual commitment to respecting needs and wants of the other without neglecting your own.
- Facilitating communication.
- Mutual negotiation on differing points of view.
- Explicit awareness of implicit assumptions.

- Acknowledgement and understanding of needs and wants expressed through relationship symptoms.
- The greatest vulnerability is daring to risk your best feelings.
- The greatest satisfaction is risking your best feelings.

## **4 Steps of Communication**

Much of the difficulty in relationships comes from one of two areas: assuming you can change someone else's behavior or attitude, and communication issues.

Connecting with another is a basic human desire. The power within a relationship is not a decision, but a commitment at a heart level. Communication is a significant foundational component in any business or personal relationship.

### **1. Reflect back to the speaker what you heard him or her say.**

This simple step assures the speaker of effectiveness—of being heard. If you're poised with a response rather than listening and reflecting, the first speaker may feel a need to repeat; both are then vulnerable to escalation.

In any relationship each person has a different perspective. It is important that each sees the other point of view and neither hijacks the other's agenda. The unspoken resolution may be some variation of "I see your point of view, and I have mine, and yours does not take over mine, though perhaps you would wish it would, just as I would wish that my point of view would take over yours." Knowing and respecting each other's point of view is the initial phase of a satisfying mutual, equal collaboration.

### **2. Clarify by asking the next question.**

Socrates taught us that really smart people ask questions rather than give answers. The detail may contain the feeling and important aspects that otherwise would have to be assumed.

A large corporation's executive team huddled around a tape recorder listening to the last presentation by the company's CEO. They were playing it, rewinding it, playing it again. Seeing that each listener looked puzzled, the consultant asked them what they were trying to do. In his speech, the CEO had indicated that the organization should "embrace more color." Each listener had a different idea about what color meant: dress, race, decoration, language, stationery. No one had considered simply picking up the phone and asking the next question: "What do you mean by color?"

### 3. Provide a context.

The context of any statement or meaning includes time, location, and system.

### 4. Listen between the lines.

For someone who listens for facts, that filter will mean that the person stops listening when the speaker stops giving facts. When someone very intelligent listens for information, the communicator must intersperse information interwoven with the newness of what is being said in order to hold the person's interest. The speaker's empathic attunement to the listener includes creating a listening environment while providing information without losing the listener's attention.

Listen literally and closely to what someone says, and you will see constant clues about what is wanted and needed. Truth as well as reality is perception.

## **12 Relationship Principles**

1. Each person has a point of view.
2. Communication establishes a common ground for understanding different points of view and creating a mutual, collaborative agreement or plan.
3. Developing empathy with another is predicated on doing it with yourself first. Empathy is a way of listening to yourself as well as to another person's

entire experience of feeling, thinking, perceiving, and behaving. Rapport, from the French verb *rapporter*, means to be in touch or contact with a person, including yourself.

4. What someone believes is more important than what they know.
5. Requiring that someone else respond to you in a particular way renders both the person and their response inauthentic.
6. What you don't do is as important as what you do.
7. Strike while the iron is cold. Know when to be reflective and invoke principles. When the house is burning is no time to teach fire-safety principles.
8. There are few true emergencies in life. "I'd like to think about that and get back to you" is a response.
9. The way in which empathic ruptures are learned from, understood, and repaired becomes a core maintenance aspect of every relationship. Everyone fails empathically with another at times. The most important thing may not be what you have done, but what you do after what you have done.
10. To forgive someone is to free yourself; if you hold on to anger and hurt, you continue to hold the injury.
11. You cannot change yourself by first trying to change someone else. The only person you can change is you. Attempting to change someone else's mode of processing or personality style won't work—and will create derailments. Quicken software cannot be changed or rehabilitated to WordPerfect.
12. Having another person live an unexpressed part of yourself can be both unsatisfying and addictive.

## **NEW RELATIONSHIP STORY ROADMAP CASE STUDIES**

### **The ROADMAP to a Woman's Reinvigoration**

Katie Snapp

In women, the challenge of moving oneself through change may not be markedly more difficult than for men, but it is definitely different. Women see their worlds as an interdependence of many domains including work, family, community, and social. So when one changes, it transgresses into the other areas. Transitions must be managed as a holistic project.

One woman, Julia, was characteristic of the self-development hike that many women take at certain times of their lives. She recognized her achievements thus far and the history that had driven her here, resulting in success, but she grappled with a feeling of stuckness.

In the spring of 2013, several women joined Julia to uncover some of those nagging themes that were tugging at them. They attended a women's retreat over two and a half days in the foothills of the Southwestern desert.

This ROADMAP journey is a reflection of Julia, her workshop colleagues, and their collective experiences as they used the ROADMAP to achieve clarity of a path forward.

***Recognize authorship of your leadership story.***

The backdrop of the Sangre de Cristo mountains was an appropriate setting for introducing this initial look at Julia's looming past and bringing it into focus. Julia saw her life as fundamentally good, but not necessarily evolving toward her most ideal future.

The group engaged in an initial exercise where they interacted verbally in a facilitated task. They used each other as sounding boards as they reflected to one another, listening for verbiage that might be connecting to an inner message. This was a time to increase awareness, whether one's past was intentional or not.



### *Own your leadership story.*

As Julia heard herself speak, she also recognized her tendencies to defer blame or state “logical” reasons for a present behavior that was rooted in her past. Her newfound friends served to effectively patrol statements that they heard by jumping in with labels like “victim mentality” or “lack of self-worth.” Raw, yet also surrounded by care and safety, all interactions felt timely and well-meaning.

In fact, the entire group was mottled with interesting histories, some painful and others just misguided. Julia soaked up the openness and willingness of sharing their pasts: a parent who was absent or abusive, the self-doubt that stemmed from being a female leader in a man’s world, a series of unexceptional career events that led to another, a luckless childhood with too many conflicts.

In Julia’s case, she owned the fact that she went through life unwittingly apologizing for nearly everything. She asked herself why she would do this. Her realization was an understanding that she reacted emotionally to most situations, and that this was a deflection that stemmed from insecurity. She was insecure about what she brought to the table. She didn’t realize her value and where she could intentionally fit it into her future. It was time to recognize that.

### *Assess the storylines and patterns.*

The women’s next step was perhaps the most eye-opening. Through a structured process of visually mapping their past in a timeline format on a flipchart, each woman created a sort of pictorial of her story. The room was suddenly wallpapered with hand-drawn ups and downs, annotated by significant events and points in time that were meaningful.

During this time, Julia saw her past as a repeating pattern of making decisions based on an emotion triggered by others. Life directions were being driven by temporary and likely unintended reactions. She needed to face this head-on, by first recognizing it, then embracing it as a deep part of herself and one over which she had control.

Then a funny thing happened. The conversation came around to a

challenge of capturing the women's individual lifelines in a mantra—a one-liner that summarized the pattern that has molded you.

For Julia, it was frustrating because nothing surfaced that told her what her mantra might be. While she heard others create evocative taglines like “Transcend adversity,” “It’s time to move forward,” or “Let it be,” all with deep meanings for their own situation, Julia came up empty.

So she turned to Stephanie, the woman next to her, who had her own impression of Julia after a short day and a half. Through the clarity of someone else's eyes, Stephanie summed up Julia's mantra based on hearing her messages, themes, desired patterns, and true strengths. She said, “Julia, you're better than it.”

And Julia saw what others had been seeing for so long. “I am better than it” became her mantra.

### *Decide what to change.*

With purpose comes clarity. Julia decided what she wanted. She would commit to hang on to her passion, but keep it from becoming unruly emotion. She would guide her life through more effective relationships and clearer communications.

She saw that there was an aspect of having more control in her direction than she'd ever thought was possible. Once the indecisiveness lifted, the path became clear.

### *Map changes.*

As the other women shared their journeys, the diverse directions cast an inspiring light on Julia's own outlook and an optimism emerged. Their strengths and courage in the face of various transitions showed Julia how much resilience there was in that room, and she was eager to move her life forward.

Julia's goals included a new commitment to stand up for herself. With some practice, she would listen more deeply in situations where difficult conversations might otherwise trigger an uncontrolled reaction. She would turn

those into productive interactions where her voice was heard.

### *Author new experiences.*

What's important about experiences we go through are the lessons we learn and how we let them define us.

Others would benefit from Julia's stronger identity. She would be a more influential role model for her ambitious children, her boss would appreciate an initiative that was backed up by a renewed self-confidence, and there would be a creativity that would emerge from feeling free of others' criticisms.

### *Program to implement and sustain change.*

Sustaining the new perspective was an important piece of the steps that followed. Julia feared that her optimism had only been a reflection of being among other strong women who also wanted to change. But when she next saw herself in a compromising position, this time at work, Julia discovered that her outlook had completely changed. She had succeeded in letting go of previous reactions and didn't have to dig very far to find her voice.

In one instance, Julia was facing a tough critic at work, someone she clashed with occasionally. It hadn't been an all-out conflictual relationship, simply one in which he was condescending to her and dismissive of her opinions. Before, she would have felt inadequate. Now she pushed through. *She was better than it.*

Maybe all we ever need is an outlet, a setting to motivate us, and a ROADMAP®.

## **Addendum**

The ROADMAP gave the retreat a structure that stimulated a sense of progress through the unearthing of past to present. For all of us the evolution continues, growing and learning and reflecting. Understanding your uniqueness as a strength, not a liability, is the start, so that we can label our past story as a byline to the future.

Possibly the most surprised by the successful outcome of the women's retreat was myself—its creator and facilitator. That alone was a message to me.

As a consultant and bystander, I addressed my own distorted perspective of my value to these women. The workshop gave a boost to my leadership story as a catalyst for others. I continue to engage myself in the self-reinforcing messages that I personally need for keeping focus on my strengths and clarity in my direction, leaving self-questioning behind.

As a result, repeats of this retreat and other training offerings have become a priority to me.

## **A Relationship Story with Myself**

Sue Gattenby

**Recognize authorship.** *You are writing your relationship story: from assumptions to every choice.*

I am aware now that I am the author of my relationship story, although previously I didn't see it this way. I assumed men didn't want me. I assumed that I wasn't lovable or good enough to have a man respect me. If a man did give me attention, that meant I was lovable, even if that attention was not good for me. I assumed if I just had a man in my life I would be happy, even if he was abusive. What is wrong with me that men always leave me?

**Own your story.** *Accountability is a prerequisite to change.*

It is painful to realize that I played into my own story. The men I chose to get involved with were never emotionally or physically available to be in a relationship. Hence, they always left me. This was my self-fulfilling prophecy.

**Assess plot and storylines:** *Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

As I look back through the relationships I've been in, I realize what I was really seeking was the attention, acceptance, and love of my father—the attention, acceptance, and love I never received from him. He was a closet alcoholic who didn't show his emotions except anger and didn't have time to spend with his daughter. What I required in a man was simply his attention. The men I sought out or attracted were always the bad boys—you know, the ones with an edge to them, and no desire to be in a relationship, much less a committed one. I never found my voice with these men for fear they wouldn't love me and would leave me. Whatever they wanted or needed, it always came before my needs and wants, emotionally and physically. I was used and abused, yet I continued the cycle over and over, never figuring out why I couldn't find a man to love and respect me.

**Decide what to change.** *Make informed choices about what story components to keep, let go, change, and enhance.*

It finally became clear to me that what was consistent in all my failed relationships was me. It was time to heal my relationship with my father. I realized that this in itself was a big step in determining what men I would

choose moving forward. I needed to learn to love and respect myself, too. This had to happen before anyone else could love and respect me. It was time to step back and take a deep look.

*Map changes: goals and success strategies.*

Ultimately my biggest goal included mending my relationship with my father. This involved learning to respect and love myself while finding my voice.

*Author new experiences. Create the new relationship story you desire.*

I now have a healthy and loving relationship with my father. He hugs me and tells me he loves me. I know that he accepts me completely for who I am in this moment. Because I have mended my relationship with my father, I am now in a healthy relationship with a man, one in which we are equals, partners, lovers, and friends. This relationship is built on mutual trust and respect, fun, and laughter. We enjoy our time together but also recognize that having other interests and friendships is healthy too. We support each other and realize we complement each other's lives.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

My new identity is that of a woman who is intelligent, lovable, and who loves herself. I respect myself, have found my voice, and now stand in my truth in all of my relationships. I am no longer tolerant of abuse in any form, and I feel healthy physically, emotionally, and spiritually. Each day I express my gratitude for how exceptionally happy and fulfilled I feel with my life. For the first time ever, I am in a healthy and functioning relationship with a man who treats me with respect, dignity, and desire. I now listen to my inner voice and from that, speak my truth. This allows me to feel good about the choices I make.

## **The Codependent**

Michael Huber

What follows is the product of an exercise I asked of a client, namely, to reflect on an agenda and issue that required exploration.

As soon as Coach Mike made his request, codependency relating to my husband surfaced immediately, so I brought this issue into our session. I have been totally codependent on my husband since I wound up my career to start our family. This has been both a conscious and unconscious process, coming at a juncture of great change and transformation in my life.

While not wanting to sound ungrateful and selfish, I believe—and feel—that my marriage and family life have rendered me powerless over my identity and life as an individual. I became a wife and mother, not knowing or exploring the dramatic change this would bring for me. I assumed that family life would provide security, happiness, and a sense of accomplishment based on unconditional love.

What I didn't factor into the equation is that being a full-time mom and wife has only allowed me to perform two roles. Although I love my kids dearly and would not change them for anything in the world, being a stay-at-home mom has been brain-numbing and soul-destroying, as I do the same things routinely and mundanely—to the extent that I feel as if I live my life in a goldfish bowl.

My husband returns from work and asks the same questions daily, to which I predictably reply, year after year. My life is programmed and running on autopilot, devoid of mystery or spontaneity. I desperately need to develop a sense of self outside the family, no longer utterly reliant on my husband's world and sense of approval. My husband is the enabler in our marriage and only breadwinner—a state of affairs I have accepted for too long. My husband is very controlling, methodical, and obsessive, which means he does and runs everything in our family. I feel totally subservient to him and unable to make choices or decisions for myself.

Before marriage, I was a highly successful businesswoman who derived a

great deal of happiness and job satisfaction from the workplace. I was well known in my business community and respected greatly for my abilities, skills, and integrity. The highlight of my career was being owner and managing director of a company I oversaw for capital acquisition. I enjoyed a large disposable income, spent in terms of my own desires and needs, and did not have to account to anyone for how I used my money. I had a large network of friends and business associates with whom I enjoyed meaningful relationships. This often entailed business trips, think tanks, seminars, and business chapter meetings. I had a real sense of self and strong ties to lots of different people and associations. I felt that the world was my oyster.

As I got into my late 30s, though, I realized that my biological clock was ticking, and if I intended to start a family, it had to happen sooner rather than later. An only child raised by one parent—a mother—I had always wanted a large family of my own. Growing up in a broken family was tough for me, and I have always harbored issues around this. I consciously dated men who I believed shared my desire of wanting to start a family. When I eventually married and we started our family, I wanted to be there for our kids from the start, finding this new chapter of my life story quite exciting. What I didn't know and envisage is that by starting a family and ending a career, I was surrendering all the things that had made me happy as an individual. It was a tradeoff, an old life for a new family life.

I am dynamic, intelligent, and capable of so much that I know I have to step outside my family and develop my own autonomy, make my own mark in the world again. If my husband died tomorrow I would be in serious trouble, as he has run everything in our lives from day one. I would be lost and unable to care adequately for our four young children.

Reflecting on all my successes before marriage, I know I am capable of forging ahead with my own identity. This would mean getting a part-time job, marketing myself, taking ownership of household duties and responsibilities, enrolling in courses of interest, and developing my own hobbies and circle of friends. I need to sit down with my husband, outline my concerns, and secure his support and understanding for change. I also need to inform our friends I am pursuing new things in my life for personal development, which is not a negative reflection of them. By developing a life outside the home I will be



happier, stronger, and more fulfilled and equipped to deal with life circumstances.

Less codependency will also benefit my husband: there will be additional income, dual scheduled family responsibilities, reciprocal professional respect, relief for him from carrying the world on his shoulders, marital head and breathing space, and having a contributing, focused, interesting life partner, not just a housewife. My kids will finally get to see their mom make use of her skills and dynamic persona in the workplace and recognize that there is far more to Mom than meets the eye. Seeing me working and living life will give my family an insight into the real me and all my uniqueness. If I can achieve this, it will be a very happy and well-balanced life.

## **Addendum**

I must say it has been a remarkable and invigorating experience working through the ROADMAP®. I have worked through five steps of the ROADMAP process and am now definitely traveling with my “high beams on.” I find the analogy of a car traveling in the dark and me seeing and reaching places and destinations most apt, to date.

Once I started to recognize that my life and functions were completely out of sync, I also saw that my codependency issues were due in large parts to self-neglect. In hindsight, I had never taken the time to assess my needs, wants, and ideals and calibrate them in a way that would bring harmony and equilibrium to my life. In fact, all the storylines and plots in my marriage and family had been symptomatic of a reactionary process whereby I had given up the ability to think and reflect about my actions and dramas. I really have been living on a treadmill for a long, long time and have lost my identity, in large part, because I had not developed the ability or skill to step outside my process and view my life, marriage, and family from another platform. I now know and understand that one has to author one’s own experiences and take responsibility, in order to bring about change.

My husband is a wonderful man and is the enabler in our marriage; however, upon reflection he really has not thwarted or arrested my identity and

life as I first thought and outlined. I got myself into this rut because I did not have a ROADMAP and coach like Mike providing the signs and roads to self-discovery. Now that I do, I have been able to identify my needs, wants, and ideals and feel infinitely better about what makes me happy outside my family life.

This has led to my opening an aquatic dog-sitting business and boarding facility. Dogs are my passion, and I am now a new business owner with a clear passion and plan. I have already secured clients and feel rejuvenated and happy. I have recognized that my happiness must come from within, rather than depending on the approval or needs of others. By opening my dog-sitting business I have forged a new identity, which is now aligned to my inner passions. Clients come to my business looking at me from a professional perspective, which has enabled me to validate my new identity.

Another important aspect of the ROADMAP practice is being aware of contradictory storylines and conflictual plots. For me, this means being aware of triggers that make me unhappy and compound and exacerbate my stress. I have identified events, people, and family situations that are unhealthy for me and sabotage my new life story (wants, needs, ideals). I have been honest with people and let them know that I am focused on a program of self-improvement in which they will play no part. While I don't use the term directly with them, in my own mind I now consider some people toxic influences for me.

My compromises inventory and resolution schedule have given me a solid foundation of attainable outcomes, costs, and consequences. I feel much more grounded, focused, and able to move forward in my life. A great example of this is those toxic people whom I have separated myself from, because of emotional and relationship compromises and broken promises. Many of my so-called friends had been taking advantage of my weakness in the guise of kindness, never returning the favors they accepted from me.

The ROADMAP is really a parable about life and how to overcome the many hidden things that greatly impact us. Mike has been a very positive source of inspiration, and I have obtained much solace, comfort, and direction from him, especially his sharing of his own ROADMAP story, which was the catalyst for my starting my own journey. Mike's coaching has taught me that life really is not as bad as I thought it was, and that my codependency issues were

for the most part manifestations of my own dysfunctions, no one else's. He has also helped me understand that this is completely normal and that I have nothing to be ashamed about. In fact, I now look in the mirror, both in the morning and just before bed, practicing a positive affirmation that I am a great person and master of my own happiness. I feel that I have achieved a great deal in a rather short period of coaching, and the resulting business has been a huge win for me and my family. Seeing dog owners pick up their loved ones from my facility and thank me is priceless, and I have every intention to go on and complete the ROADMAP®.

## **A New Relationship Story**

Jennifer Turner

The following is a work page for a new relationship story by a well-educated professional woman going through a relationship transition and leadership story

Mary is a leader of a nongovernmental organization that has international acclaim but was having problems establishing its roots in the state where its head offices are. She was known in her organization as a very tough, no-nonsense leader. Her followers feared her because she was very good at finding fault with them, even though she also helped them overcome those faults. She did not socialize with her followers or staff, considering this to be beneath her. She felt familiarity was not good for her image as a leader; therefore she did not bother to get to know them well. Her control and command style of leadership meant that her followers were not expected to act proactively and creatively but to do as they were told without question. She also believed that empowering others should be done conservatively, and that the teacher should not pass on everything she knows to her students. She feared that with increased knowledge her students would surpass her, robbing her of their respect. The morale in her organization was low, and membership was rapidly declining. She had to face this crisis on her own without the help of her members. She was battling depression and health problems because of the effects of the prolonged crisis.

When I started working with her in our coaching sessions, it was initially difficult for her to recognize that she was authoring her relationship and leadership story. For the most part neither she nor her members believed she could change. I had confidence in her greatness, however, and believed she would be able to change and accomplish a great deal for her organization. When she recognized that I was fully present for her and would champion her cause without judgment, she began to speak what was in her heart

When she articulated the tremendous pain in her life, I listened empathically. Right away, it was as though a massive weight lifted off her shoulders. She became acutely aware that her approach to relationships and leadership was not bearing fruit. The awareness and acceptance of how her

approach was limiting her achievement became the fuel for her transformation. She accepted all responsibility for her results and stopped blaming others and her environment. I made her aware that as an adult she was the author of her relationship and leadership story, and only she could change it to suit her current needs.

*Recognize authorship.*

You are writing your relationship and leadership story from your assumptions and beliefs, to every choice about leadership and how you relate to your members.

I am aware that I author my leadership story, including how I relate to my members, although previously I thought that my members would become disrespectful if I allowed them to know me intimately.

I thought that if they found out I had struggled with the same problems that they struggled with, they would not want me to lead them. I also thought they would reject me and leave me.

*Assess plot and storyline. Recognize hidden messages and allusive language of mind and emotions.*

I have had great members who had great ideas and wanted to help me build my organization, but my own insecurities and fear of being abandoned got in the way.

I am aware of my deep desire for validation and recognition because I failed to be receptive to the ideas that my members brought forth.

Basically, I was abandoned by my father, who was a difficult man to deal with. I grew up sickly and alone with no friends because I thought they would get tired of helping me. I felt that being with me would be burdensome to them. I was always afraid they would eventually reject me.

I have had instances where the people I trusted the most—my family—betrayed me and told my husband to leave me because I was too sickly.

I did not like to depend on people, because I felt that they would betray me when it mattered the most, as my family did, and therefore I learned to depend only on myself.

*Decide what to change, make informed choices about what story components to keep, let go, change, and enhance.*

I believe that I am worthy of help from my members. I will develop cooperative relationships with others, so that I am not always reinventing the wheel. I will let go of the fear that everyone is out to get me. I will learn to trust and begin delegating without micromanaging. Learn to love my members and be willing to listen to their ideas and implement the good ones. Find my center and be more aware of my worth and capacity to grow from giving, find happiness in small things. Explore.

*Map changes: goals and success strategies.*

Allow my spouse to help me build our organization. Start monthly meetings where I can get to know my members and hear their ideas. The first monthly meeting this month. Spend more time with my coach and learn more about transformation and change so I can become a more conscious leader. Develop a new participative and appreciative approach to leadership. Rather than limit my members by withholding information and knowledge, share it with them so they can grow. Instruct my members and staff to say “Yes, sir” every time they perceive me to be overbearing and tough, as a reminder for me to shift states of mind.

*Author new experiences. Create the new relationship/ leadership story you desire.*

I am lovable and work well with others. I am a good listener and add value to all my members. I am allowed to accept ideas from others for the good and growth of my ministry. I love to spend time with my members in order to understand how better to serve them. I am respectable and well-

honored by the people I serve.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

My identity will be that of one who is well balanced, centered, and comfortable in her own skin.

I will spend time with myself and gain more security in being my best self so I can learn to love and appreciate others.

My identity will include confidence in my ability to lead without feeling threatened by the gifted members in my ministry.

My identify will include adding value to others and satisfaction in seeing them become better. I will seek out knowledge about how to collaborate with others and build a strong loving ministry.

## **Addendum**

After a year of our coaching relationship, Mary has created a new relationship culture that increased membership satisfaction and performance. The change was so profound that she is now not only a sought-after speaker but has also started training leaders under her organization. Her members love and respect her and express what a joy it is to serve under her. They tell me how Mary is a changed, loving, and understanding leader. She calls me often to tell me how grateful she is that I saved her life and changed her ministry into a great success and satisfaction. Her membership and ministry have truly blossomed.

Putting together the ROADMAP System summary for a New Career Story helped me understand how I got where I am today by setting up a system where I focus on what my needs and values are. Once I got clear on my needs and values, I could better see where I wanted to go from here. It also asked me to look at what is present in and missing from my current career. That process

helped bring up old feelings that I had stuffed so I could do my current job. I can look at what is missing now and create a plan to bring what is missing into my new career.

I think the most important part of this system is the last step of programming a new identity. This is the step that has been missing from any of my careers. In the past, when times got tough in a new career, I would long for the old one and want to revert back to the old me. Now, I have a new way of keeping myself on track with the new identity in the new career.



## **A Relationship Revision**

Mary Beth Stolte

The following is a work page from the use of the ROADMAP for a New Life Story® by a middle-aged woman going through a revision of her relationship story.

### ***Recognize authorship.***

Julie is a middle-aged woman who came to me with issues surrounding her dysfunctional relationship with her mother, Irene. One of the major issues between them is that Irene has a difficult time accepting Julie's relationship in marriage to her husband Rob. Irene believes that Julie is actually unhappy with Rob and her situation but is not strong enough to stand up and make a change. Julie, on the other hand, believes Irene does not understand Rob or his background and therefore does not recognize the positive effects and influence he has on Julie and others. Finding herself an object of scrutiny and ridicule, Julie has therefore withdrawn and distanced herself from her mother to avoid confrontation.

Over time, Julie has come to recognize her authorship in this relationship story by acknowledging that she had allowed her mother's behavior to control her. In order to respect her mother, Julie had run from the situation rather than discuss it frankly with Irene. In an effort to speak her mind respectfully, she wanted to find her voice so that she could tell Irene her behavior was unacceptable.

### ***Own your story.***

Julie's biggest task will be to address the fight-or-flight tendency to run and ultimately move forward by finding a way to speak her mind in a manner she feels is respectful to her mother. She has accepted her part of this relationship story by owning the fact that previous discussions with both her mother and male siblings have ended in shouting matches and arguments, because she herself gets offended. Adding the defensive position to her level of frustration involved in trying to keep communications with her mother respectful, Julie often finds herself retreating. This causes her to ignore any communication efforts by anyone in her family of origin.

### ***Assess plot and storylines.***

In her late teens Julie was diagnosed with anorexia nervosa. While she understands that she will battle this all her life, Julie believes she has it under control. But by her own admission Julie exhibits some perfectionistic behaviors. As reported by the Mayo Clinic, “Anorexia nervosa isn’t really about food. It’s an unhealthy way to try to cope with emotional problems. When you have anorexia nervosa, you often equate thinness with self-worth.” Recognizing that perfectionism is both a biological and psychological factor in anorexia, Julie came to understand that she and her mother have had a strained relationship all her life, and that her marriage, while it seems to be at the center of her mother’s current anger, is not the true center of the issue. Julie recognized she has been feeling inadequate in her mother’s eyes since early childhood. Now, as a grown woman, she can admit to herself that she doesn’t have to measure up to anyone’s expectations.

### *Decide what to change.*

Being able to own her part in this relationship story, rather than bear her mom’s feelings of judgment, Julie now has the courage to let Irene own her own feelings. She understands that Irene has a right to her own feelings and recognizes that those feelings have no place in her own life. Julie has decided that speaking her mind does not mean being disrespectful to her mother. She believes now that in disallowing her mother’s disrespectful behavior towards Rob, she will help Irene be accountable for her own actions. That can ultimately strengthen, rather than weaken, the relationship between Julie and Irene.

### *Map changes.*

Julie is aware of how others in her family perceive her previous lack of communication with them. She has made the decision to confront all negative communication head-on, in an effort to mitigate underlying issues that may build up in her relationships with others as a result of having ignored them. She is committed to staying true to herself and her own happiness, while recognizing that everyone does not have to agree with her decisions. And that is ok.

### *Author new experiences.*

Julie has declared she will no longer let the expectations of others be the measuring stick by which she gauges her own happiness and success in life.

*Program new experiences and identity.*

Moving forward, Julie is committed to staying true to herself and her own expectations of success and self-worth. She has reached a place where she knows that her relationship with her mother, while she believes it is full of love, is limited by the conditions put upon it. And Julie is ok with agreeing to disagree.

## **Jessica's Relationship Story**

Jana Sedlakova

When I first met my client Jessica, she was fearful and distressed. Jessica, at that time, believed that she was doing everything wrong; her husband accused her of being wrong all the time. She could state nothing positive about herself nor her life. Her mind was clouded with a debilitating negative outlook on life in general. She believed she was wrong and had to work on herself in order to save the marriage.

We began our first session with my typical initial question for clients: "Are you the creator of your life or the victim?" Jessica couldn't answer at that time, responding simply, "What do you mean?" From my experience in the life coaching field and through life observations, I've come to understand that few people are aware of the fact that our mind and thoughts are creating our reality. Most people's way of existing is built on external influences by what others tell and show us, rather than by listening to our own instincts and creating our own reality through conscious decisions.

Coming to me as a client to improve her marriage, Jessica held the strong belief that love can conquer anything. On the other hand, her husband saw Jessica and everything around her in a negative light. He abused her verbally, emotionally, mentally, and financially. She had trouble believing there could be anything good and positive within herself. She blamed herself for the failing marriage, trying anything and everything to please her husband, but to no avail, as he continued to behave abusively towards her. She couldn't see the light and love that I saw deep in her soul. She was merely reiterating what her husband was saying to her and who she was in his eyes.

We started the process of life coaching, and step by step we worked to help her identify her belief system. I made use of the ROADMAP System created by Dr. David Krueger, which had been successful with my previous clients.

One day, during one of our weekly sessions, Jessica came to her first big realization that she owned her own story. It was a breakthrough. She exclaimed, "I allowed this man to treat me poorly, and I was not able to stand

up for myself and say No! to him. I knew before I married him he was not healthy for me, but I believed that love could save anything.” It was a huge awakening for her, as she recognized authorship of her own life story. She had allowed this man to abuse her, and she felt powerless as a victim.

Watching her awakening that day was powerful for me as well, as the transformation began. She finally grasped the concept of being the creator of her life. She began to understand that only she owns her story. She saw that in the past it had been her husband who owned her story, telling her who she was and how she did everything wrong. As she started to detach herself from his belief system, she was restoring and rebuilding her own beliefs. She finally saw that she was the one responsible for her own thoughts and feelings.

Jessica's understanding went even deeper. She stated, “When I was a little girl, I was raised by two beautiful loving parents, who believed in the good. They always made sure that I was nice to everyone and that I was a good girl. They didn’t teach me to stand up for myself and protect myself.” She held no grudges towards her parents for not teaching her to defend herself, as she knew that they always meant the best for her. But she also knew it was now her time to reframe her belief system. As powerful realizations flooded her mind of how her childhood had affected her reality at all times, she said, “My parents were amazing and loving people, but what they never taught me was protection, understanding of my own self, my value, and the importance of saying no to unhealthy people and relationships. I don’t blame them, as I know they meant only the best for me. But now it is my time to learn it on my own.”

By this time, Jessica realized she had to assess the plot and the storyline of her life, including her childhood and upbringing. She understood that her past was part of her and created her present reality. Being nice was important, but she also acknowledged that staying in a toxic relationship simply because she should be nice was damaging her and would continue to do so in her future.

With all the new realizations, the next step was to decide what to change in her life. Her list was not short. She had to begin with loving and accepting herself, forgiving all that had happened in the past, and safely leaving her husband. She knew she needed to take an inventory of her own mind in order to restore her own health and mental strength. She was ready for the change.

So we began to map changes to get her through this transition and help her feel good about her life again. The map contained details such as locating support groups and a good lawyer, surrounding herself with positive and loving people, planning to exercise and eat healthier, when and where to move, financial planning for her future, and identifying who in her circle of friends was available to help her. We made sure that her ROADMAP was clear and contained her goals with a set timeline.

She was slowly getting ready to take action and author new experiences. After she moved out of the house and filed for divorce, Jessica experienced another huge shift in her life. There was a lot of uncertainty, but she excelled in taking the authorship of creating her new life story. She knew she was in charge of her own life and felt very good about herself. She realized that the world was full of great people who loved her and were gentle and kind. She experienced an abundance of comfort and support from others because she had started to believe that she deserved it. To the unhealthy people who would come into her life she politely said no and walked away, as she now knew she had no more time or energy to waste. Her focus was on herself and creating the good life she had always wished for. And so she invested her time, energy, and love in the people she sensed and knew were good for her.

As she programmed new experiences and identity, her life became a beautiful journey full of success and great relationships. She was smiling and shining every day. She attracted what she was creating, and it felt good. She was fully aware of the power of her mind and how our belief system affects our reality. She believed it was her time to receive the good, so she did. When she was buying her new home, the real-estate agent waived his brokerage fee. She was deeply touched when he said to her, "Now it is time for you to receive." It made her cry tears of happiness. She clearly had harnessed this kindness she received from this man.

Later on she started a nonprofit organization for children, which created much happiness within and around her. She eventually met a wonderful man, who treated her with so much respect that she created her own motto: "Every day is a miracle, and if you can share this miracle with a person you love and who loves you back, then it is double miracle."

She succeeded in most of her future goals because she recognized her

own power, independence, and ability to be the author and creator of her own life story. She followed the ROADMAP and made all the changes necessary for her new life to blossom. And watching her turn her life around provided me the greatest joy as her life coach and friend.

## **Addendum**

A few months after we concluded our coaching sessions, Jessica sent me a thank-you letter expressing how the ROADMAP System helped her.

“Dear Jana, I wanted to thank you for your professional help during the most difficult time of my life. Looking back, I am amazed how much my life has changed for the better, and I realize how helpful your coaching approach was. The ROADMAP methodology that we used was designed with the right steps and asked the right questions for me to understand what I needed to know about myself and my issues. When I recognized that I was the creator of my life, my whole reality changed. It was very empowering and awakening.

“The ROADMAP helped me establish a healthy belief system about myself and others, and go through the changes I desired. It was like being on a train headed to a better destination; it helped me see where I was, where I needed to go, and how to get there, in a logical way that I could follow. I never thought that I was the one who creates my own life; I had let others do it for me. Realizing how much my upbringing affected my adult life, thoughts, and emotions was important for letting go of the past influences and taking control of my life to make positive and lasting changes. I am a totally different person now, I enjoy my successes, and I enjoy my life. Thank you again for helping me take ownership of my life and realize my value.”

## **Rachael's New Relationship Story**

Phillipa Wilson R.N.

The following is a story developed from the ROADMAP for a New Relationship by a professional woman yearning to improve her relationships.

Rachael presented for coaching on relationships that she felt needed to change in order for her to move on and enjoy a better life. She recognized that the situation began in her childhood and had carried through into her adult life. She related her story as she lived it, beginning in her native country. The third child of six and the only girl, she was also the middle child, with two older brothers and three younger.

She played the role of observer-participant as she carefully listened and watched the family dynamics. She had her own responsibilities and was did them well. She also noticed the lack of effective communication, and that her father sought to control to make things go his way. Mother, on the other hand, was passive and protective. With this awareness, Rachael grew closer to her mother, who nurtured and guided her into choosing a career.

As a young adult, Rachael had left her native home to go to the United Kingdom to pursue a career in nursing. Although separation from her family raised some anxiety and fear for her, she believed her new environment would bring opportunities for change.

*Own your story.*

Rachael felt that becoming a nurse changed her. It was in her first class in human development that she began reflecting on her old relationships. Memories and inner conversations of her past relationship experiences flooded her mind. She recognized what was missing. She became aware of herself, the role she played, her identity, and the reality of her own relationships. She took ownership of her story.



*Assess plot and storylines: Recognizing behaviors, hidden messages, and elusive language of mind and behaviors.*

She began to accept herself as she became more aware of her own differences and the role she played in her relationships. She acknowledged that unassertive and inactive behavior had become part of her personal story. To hear her take ownership of her story and decide to change brought admiration for me. She shared with me that her vision was to have a close and loving family far different from the one she experienced, yet she struggled with the conflicting thoughts and assumptions that played out in her life.

She wanted a family whose members communicated well and shared ideas with each other. She expressed how angry the absence of free-flowing communication in her childhood home made her. She saw her father as controlling, while her passive mother retreated to avoid emotional upheaval. Further, the mother protected the family from having any emotional rupture exposed.

I then asked her to describe her ideal family. As she spoke, a clear plot and storylines emerged. She envisioned a family where respect for each other's point of view, trust, and understanding were critical for maintaining a healthy relationship.

Married as a young adult, she entered a new relationship with her own storylines of communication, assumptions, behavior, choices, and vision of how this relationship would evolve. She soon discovered, however, that she was reliving her family's old story. In this intercultural marriage, emotional issues about money, gender, power, and control were not discussed. She yearned to express her feelings of insecurity, low self-esteem, and lack of love. She felt responsible for making all the decisions, and communication was strained. She found it challenging to express her needs and desires, for whenever she attempted to do so, her efforts were followed by tantrums and emotional explosive behavior. She experienced emotionally charged moments with frustration and anxiety.

She saw the necessity to change but did not know how. I asked her, "What new patterns in your relationship and conversations do you want to initiate?" She did not want to relive her old story where poor communication seemed to

be the norm, and once she recognized her true identity, her values, and ideals, things began to change for the better.

She wanted mutual respect, clear communication, and shared responsibility to be her top priorities. She wanted understanding and conversations about needs and feelings that could be communicated without harm or hurt. She yearned for a closer and exclusive relationship with her spouse.

### *Decide what to change.*

Rachael recognized that in the beginning her assumptions and interpretation of her early relationships provided the key to her story. She knew what she wanted and what she wanted to change. She recognized that what she saw in her parents' relationship caused her to choose a new way of thinking and being. She wants to be more assertive and responsible for making decisions. She wants to improve her communication and listening skills and allow time for others to express themselves, to be more mature and not allow petty matters to get in her way. She plans to use her voice more powerfully to convey her messages. She will continue her coaching sessions and find time for self-care, silent reflection, and meditation.

### *Author new experiences creating a new relationship story.*

Rachael recognized that the role she was playing in her relationships was immature. As a mother and grandmother her role has now changed. In her new relationship story, she enjoys a close, loving, and exclusive relationship with her family. She recognizes that when she becomes emotionally overwhelmed she can use her wisdom to resolve her challenges. She has learned to communicate or collaborate with others without causing disharmony.

### *Program new experiences.*

Having found her voice and become more assertive, Rachael now plans

to be her true self and take care of her needs and ideals, letting go of her old story to create and enjoy new experiences and her new story. She feels free and confident. She will reconnect with friends and family to reestablish relationships. She recognizes how trusting herself and others has helped her become a stronger and wiser woman.

She also recognizes how improving her listening and communication skills and allowing another to be his or her own individual has evolved into its own story with its own voice. She wants to experience loving relationships, happiness, and joy.

## **Addendum**

As I started to summarize this ROADMAP of a Relationship Story, I was awakened very early in the process to the fact that change is not easy. I learned that healthy relationships begin early in one's life. Where there are unmet needs and values, very little will be accomplished along the way. In this story I understood that my client had to first live new experiences repeatedly before the old experiences could be replaced. I recall her repeating her new experiences over and over until she became comfortable with them and believed them. She expressed feeling free. I recall feeling her joy as her tone of voice softened. I felt that the process of change had begun. My client recognized changes of belief and behaviors as she reflected on the childhood relationship experiences that followed her into adult life. She recognized the need for change but did not know how to accomplish it. Through her coach's guidance, she began to view her world differently

She recognized that she authored and created her own story after starting as an observer-participant. The patterns her parents displayed became her patterns. At times she displayed passive behavior, at other times she had fits of temper, feeling angry and frustrated when her needs were unmet.

Great lessons emerged from this experience: Have a clear understanding of the roles and attitudes of male and female and the social and economic issues those roles may have on family, child rearing, and ageing. Know the rules and the roles, spoken or unspoken. Be open and discuss matters related to

financial matters and who handles responsibilities such as household matters, children, and chores.

## **A New Relationship Story: Parents, Husband, and Self**

Francesca Marchegiano

The following is a work page from use of the ROADMAP for a New Relationship Story® by a successful woman who decided to review her relationship with her parents in order to recover well-being in her marriage as well as in the rest of her personal life. We'll call her Maria.

### ***Recognize authorship of your story.***

I acknowledge the need to take over my life, writing my own history and not just reading it on pages written by others since I was born. I am aware of this, but I haven't been able to realize it for thirty years. I thought that the handwriting on the pages of my life, my choices, on the roads I took was my own handwriting. But no, it was my mother's hand-writing. She had done it ever since she first wrote my name.

### ***Own your story.***

Now I know that my story is only mine. I must learn to know myself, wondering at my dreams, my strengths, my expectations for the future. Accepting different answers from those my parents would expect, from those my mother would like to hear. Although I'm already an adult woman with a very good job position, a husband and two children, inside I'm still like a little girl who needs to be held by the hand. I must be proud of who I am, or better, I must be proud of who I want to become, accepting even my weaknesses, learning to love them as part of what I am.

### ***Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.***

This is the most difficult part. I don't know who I want to become. Now I understand the importance of rebuilding my own story, looking back at the past too—which roads have led me to happiness, which ones to sorrow, and the

reasons for both. That helps me to create a sort of compass with which I can orient myself. The fact of rebuilding my story so far lets me draw a map towards the future.

*Decide what to change: Make informed choices about what story components to keep, let go, change, and enhance.*

I want to get rid of anxiety which brings a sinking feeling to my stomach every time I have to assert my idea or my position in front of my mother. The same thing happens every time I have to assert myself at work; I always feel unsure. I want to stop being a daughter, to find my adult self and let it express itself in its best way, even into the relationship with my husband. I realize just now he has had to carry alone the burden of our couple's relationship. I have teamed up with our children as if I were the third sister. I haven't been a guide for them. My husband played the part for me of that parent whom I had never dared to rebel against. Well, I have rebelled against him now, almost bringing our marriage to an end.

*Map changes: goals and success strategies.*

Calling my mother twice a week, not three times a day. Spending the majority of the time with my husband and my children, and only one weekend per month with my parents rather than every weekend. Taking for myself at least two or three hours a week to spend alone with my husband, even just to take a walk after dinner. Defining educational rules with my children, and make them follow those rules. Learning to manage anxiety by enrolling in a yoga and meditation class.

*Author new experiences.*

I am a woman who takes care of her children and her husband, who is a lodestar for them, a support, sweet and enjoyable company. I am an adult who will gain her parents' respect by keeping calm and standing firm, refusing to let them invade her private life with their anxieties, but constructing with them an

adult and healthy relationship.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

My identity will be that of a stronger woman, free from limiting ties, who loves growing and feeling in an adult body. I will find the way to connect with my child part, listening to her and heartening her, even through the exercise of writing and meditation. For the rest of the time I will be an evolving human being who lives her present with curiosity and who is the author of her own future, a future that she's writing with her husband and children.

## **Addendum**

When a client such as Maria gets stuck in a particular state of personal or professional development, showing her a detailed program divided into different phases creates instant confidence in that process and makes her more disposed to get involved, knowing that she will only have to deal with one step at a time. Forgetting about the final result and focusing instead on more simple and accessible targets lets her build more and more confidence in her own abilities, getting closer faster to the expected result. The ROADMAPSystem is a methodology I recommend for anyone who wants to make important changes in life: improving self-knowledge, keeping a check on difficulties and success, and clarifying the image of the future in order to be the author of it.

## V. NEW LIFE STORY®

### 4 Principles to Recognize Authorship

*Principle 1. Our experiences are always consistent with our assumptions.*

Our beliefs write the software of our behavior.

We see what we believe. And we're always right—because we write the story.

A belief is the mind's command to the brain. With the same belief, you will continue to have the same results. If you change your belief, you can have different results.

*Principle 2. We don't see things as they are; we see things as we are.*

Our beliefs become our reality. Some things you have to believe in order to see.

A story can define possibility. In centuries of recorded time, no one ran the mile in under 4 minutes. It was impossible. Roger Bannister broke the four-minute mile in 1954. Within the following twelve months, over a dozen other runners broke the four-minute mile as well. (Bale and Howe, 2008). The obstacle of the impossible could no longer be constructed. Today this is commonplace. When the mindset of what is possible changes, reality then changes as well.

The beliefs within us—our own internal map of reality—determine our perception of what surrounds us, including what and how we select, register, and process. We construct our storylines from these premises.

We have to bring our beliefs about money, finances, and wealth into conscious focus to assess how well they work in present time.

Here's an example. One couple married a week before Black Friday of 1929, the beginning of the Great Depression. The poverty and scarcity of their situation centered on the reality and the metaphor of Depression-era finances.

Money was elusive for this family with seven children, and they often struggled even to have enough food. They were proud that they had never gone on relief (known today as welfare), even though it meant that the father had to be away for several months at a time finding work in other states. In those days many people viewed accepting money from the government, even if they were in need, as being an object of charity, and their pride held them back.

Finally, after years of being exhausted and tired, the mother agreed to accept relief. Around this same time, after almost three years of canning



vegetables, she was able to barter her canned goods to have her home painted.

Someone in the relief agency passed by and saw her freshly painted house. Wondering how she could afford to have her home painted, he called on her to inquire.

“Does your family really need to be on relief?”

This proud woman responded, “Just take it back. I don’t want it.”

For this family, unearned money had strings attached.

Their experience of the scarcity of money became a legacy, amalgamating their life and money stories.

Decades later, the same woman’s granddaughter, going through a post-divorce adjustment and geographic move, had a difficult time supporting her two children, but she was adamant about not asking for help. She was determined “not to become one of those people who take welfare.” She carried the same torch of pride as her grandmother.

She noted, “One of my children refused to eat the free lunch offered at school because choices were limited. Her great-grandmother had learned that you gave up certain freedoms if you accepted a free lunch.”

The choices made by parents serve as models that children emulate. Children experience and take unconscious notes—and those notes later get passed on. We know that many beliefs and behavioral patterns are downloaded during the first years of life without the infant’s conscious recognition.

*Principle 3. A new story can only occur by living in the present moment.*

Our possibilities are always a manifestation of what we allow ourselves to consider. The implementation of a change in regard to money can be difficult, because it often requires us to change the way we think about money in any of three ways:

- Breaking bad or outdated habits
- Developing new behaviors
- Remaining disciplined for the long term, no matter what

*Principle 4. Our minds seek closure and infer causality, accurate or not.*

The Wharton School of Business (2007) surveyed several thousand professionals about their fees to determine what factors influenced acceptance or decline of professional services. These factors included credentials, reputation, experience, amount of the fee, and state of the economy.

They found that the two factors most significant in determining whether

someone accepted or declined professional services were how clearly and how confidently the professional stated the fee.

They found that professionals' credibility suffers if they are fuzzy about fees. Doing so damages the client's trust. For most people, the issue was not whether fees were high or low, but whether the professional was clear, direct, specific, and confident about recommendations and fees.

The significance of confidently stating fees may be explained by a series of studies reported by Dr. Daniel Gilbert of Harvard (2005). He showed volunteers words on a computer screen for a few milliseconds—such a short time that the subjects were unaware of having seen the words and could not even pick them out or guess from a multiple choice. Yet they were influenced by them. When the word “hostile” was flashed, volunteers judged others negatively. When the word “elderly” was flashed, volunteers walked more slowly. When the word “stupid” was flashed, volunteers would perform less well on tests.

When these volunteers were later asked why they judged, walked, or scored the way they did, they didn't say, “I don't know,” but instead quickly considered the facts that they were aware of and came up with some reason.

For example, the volunteers who walked more slowly would come up with such reasons as, “I was a little tired when I did the test.” Or, “I have been traveling for the last few days, and haven't slept well.”

All the subjects were unaware that they were falsely attributing cause and effect.

We have a desire to bring closure, for our brains to end any dissonance by imposing certainty, and for our minds to create a complete story by a causal explanation that infers both closure and a sense of effectiveness. Completion trumps accuracy.

This is why we rationalize, justify, or do any number of other mental gymnastics that bring closure without ownership or growth. A finish without an ending.

## NEW LIFE STORY ROADMAP CASE STUDIES

### **Rose's New Life Story**

Kay McConney

#### *Recognize authorship.*

Rose's head was bowed so low in her grief when her husband of over twenty-five years died unexpectedly that she couldn't see how any action on her part could change a thing. In her mind, God and his universe of forces beyond her control were responsible for all that had turned wrong in her life. The secrets and betrayals she uncovered in the aftermath of her husband's death were devastating. And unless Rose acted quickly to clean up the legal, financial, and emotional mess her late husband had left her in, she stood to lose her home, ties with his family, and her financial freedom.

The heavy weight of these stakes and the urgent need to deal with them forced Rose to stop feeling helpless and adopt a mindset that recognized her power to impact what happened to her next. As Rose geared up to author her survival story, she grabbed me as her coach and made a pact with herself to find a better place than misery to live.

#### *Own your story.*

At first the idea of owning her story was unnerving for Rose. She was of the faith that her life was predestined by a Higher Power; therefore she had no accountability for it. To work through this belief, I presented Rose with forward-thinking, what-if scenarios. What if you called a lawyer to get legal direction on how to proceed on this matter? What if you contacted your husband's former client and asked him for the necessary release letter to appease authorities? What if you refused to entertain conversation on this subject with that family member until you better understand his intentions? As Rose worked through each what-if, she saw options and simple actions she could take immediately to change her present story, and she saw how *not* taking responsibility would keep her miserable.

Quick wins built Rose's confidence to take on more responsibility. As she did so, she felt more empowered, and as she felt more empowered, she

assumed greater authority in her story. Several weeks later Rose acknowledged that her belief in the higher power of God wasn't mutually exclusive to acting within her own power after all.

### *Assess plot and storylines.*

Rose was angry and stuck in "Why me?" questions. Why did this happen to her? What did she do to deserve it? As a way forward, we agreed to unpack her feelings and behaviors within the experience of her marriage.

Rose noticed that by her disinterest she had excluded herself from the affairs of her late husband's business ventures, despite the possible repercussions for her. By not questioning stories that didn't add up financially or behaviorally, she had forfeited the opportunity to contribute to building a marriage of accountability. She admitted to making excuses even when she found evidence that her husband's bedroom silence at home was matched by bedroom noise elsewhere. "Men will be men," "Men take care of those things," and "Women don't need to get involved with that" were among the messages she internalized, which either prevented her from acting on financial matters early or diluted her drive to influence relationship outcomes before crises hit. Rose recognized that she had been in reactive mode for much of her married life—acting with hindsight and rarely foresight.

We considered the positive results Rose achieved on the occasions when she did step forward and show genuine interest in her husband's business ideas, asked questions up front to understand rather than accuse, stood up for herself and sought explanation instead of making excuses, and showed the same level of respect for her own needs as she did her husband's. Through this exercise, Rose saw how her inaction had become an action in itself, helping to perpetuate outcomes which left her feeling excluded, insignificant, and unappreciated.

### *Decide what to change.*

Rose's decisions about what to change—what to let go of, what to keep, and what to enhance going forward—emerged as she tackled the issues of the moment. She had no grand vision at the outset. She focused on immediate, situation-based changes to get through whatever roadblock arose as she tackled

unfamiliar business matters, negotiated away debt she didn't know existed before her husband's death, investigated her rights to the family property amidst covert challenges from others, and petitioned courts for the authority to administer her husband's complicated affairs.

Rose chose to let go of relationships with a number of people who had taken advantage of her vulnerability when her grief was at its worst. She let go of the belief that she wasn't man enough to manage business affairs effectively, and she stopped saying "Yes" to unreasonable requests that drained the limited resources she had left. But Rose held on to her resolve to survive, and she accelerated her pace in confronting issues.

She scheduled appointments with relevant institutions to unplug bottlenecks, documented verifiable claims against her late husband and turned them over to the lawyer for legal resolution, and systematically met with persons who had outstanding business with her late husband to settle issues as amicably as possible. Rose also changed the way she treated money (i.e., as a disposable commodity) and engaged a financial advisor to wade with her through her troubled finances.

### *Map changes.*

To help her map and implement desired changes, Rose established a support system: (1) a coach to support her forward movement on the personal front; (2) a financial advisor to set up repayment and investment plans and help her establish realistic financial goals; (3) a lawyer to protect her flanks on legal issues and to plan estate matters; and (4) a caring network of family and friends to boost her spirits and keep her company when she needed to feel loved.

### *Author new experiences.*

Rose strategized with her advisors to author new experiences that took her away from the old story of an angry, wounded widow and moved her into that of a sober-thinking, empowered woman. She learned to be conscious in the choices she made about matters that affected her finances and her quality of life, and she became actively involved in creating the outcomes she desired. The life Rose desired had less medication and improved physical health. It had the freedom to spend more time with family and friends. It had fun, adventure,

and emotional peace.

In pursuit of these goals, Rose embarked on a walking regimen three days a week, confirmed her retirement date with the human resources department at her workplace and followed through a year later, attended at least two social events every month, and actively worked on specific language that made her more affirming in her self-talk. “Don’t panic, make a plan” became our coach-client battle cry when new challenges popped up.

### *Program new identity.*

To program new identity, Rose took up reading. It expanded her knowledge and inspired her. She continued to work with me and her trusted advisors on developing systems to help stay organized and mentally focused on what mattered most to her. Rose avoided influences that encouraged her old identity. And when she missed her late husband or became saddened by memories of his shenanigans, she stuck to her emotional rescue plan: called a friend for support, cussed and cried it out, substituted positive memories for whatever thought was bringing her down, went for a vigorous walk, turned on music and danced (which she loved to do), did something nice for someone else, and prayed.

### **Addendum**

Rose forged a new identity with consistent, purposeful action. She behaved her way into being an adventurer in the prime of her adult life. Rose figured out that identity is embedded by lived experience, so she got in motion and stayed active in her own story. Rose surrounded herself by a caring support system that reinforced her new identity and helped her sustain the momentum of growth.

Rose’s focus at the start of our two-year coaching relationship was to save her home, regain financial security, and find peace of mind in the midst of personal crisis. Today, Rose has legal ownership of the property she lives in. She is rebuilding a financial foundation on sound professional advice, and she’s finding her peace in faith, family, friendship, and the kind of fun that makes even the most youthful spirits do flips. Rose admits that programming her new identity is still a work in progress, but the best thing about it is that it’s

hers and hers alone to create.

When asked what lessons she learned from applying the ROADMAP®, Rose shared plenty. Three stayed with me:

1. Belief in God's higher power is not mutually exclusive to acting within your own power. Claim your authority.
2. Not everyone who seems good *to* you is necessarily good *for* you, when you're programming new identity. Be selective. Let go.
3. When life's crap hits the fan, turn off the damned fan before you start to clean. Seize control of now.

## **Sahaja's New Life Story**

Sahaja McGuigan

### ***Recognize authorship.***

I am writing my dynamic life story. In the past, I had it ghostwritten by my various roles, identities, and outside expectations—namely, supermom/wife. What does it look like, and what activities define and fit in doing supermom/wife? Being cook, housekeeper, chauffeur, a successful career in nursing so I can bring home a “chunky bacon,” close my eyes to make it seem like I sleep, open my eyes, and do it all over again. Then, when I get tired, it shows up as 1) frustration that I am not doing enough, and/or 2) I am a victim of my choices, powerless to make, create, or effect change.

### ***Owning my story.***

I have a good life, my family is healthy, and we are thriving. Yet as a person, as an individual, I feel spent, dried up, and confused. Confused because I am aware I want more than a good life. I want an excellent life. But what about my supermom/wife identity? I can't possibly upset that applecart—or can I?

### ***Assess plot and storyline.***

To be a supermom/wife, I choose to ignore needs of my own. I have only minimal time to take care of my personal hygiene, to look good and presentable, and hopefully, pleasing to my husband for his sake. I strive to remain competent in the job market so I can continue to contribute to the family coffers, then come home to cater to the needs of my family. Please don't get me wrong. I love my family and my family loves me. My spouse takes on the responsibility of being the comptroller in our relationship so I don't have to. Both of our daughters are straight-A students, mature for their age, and both hold second-degree black belt in the martial arts of their choice. What more can I ask for? But yes, I want more than a good life. I want an excellent life!

### ***Decide what to change.***

I must change my perspective, the meaning I attach to why I do what I do. I need clarity and focus in my life. Clarity is power, and there is power in clarity. I am clear with the fact that I am significant. What I do does matter.

*Ubuntu:* I am because we are. I have identified my need for harmony, as



in the inside mechanism of a watch. It has several wheels doing individual functions while turning in synchronization with other wheels, making a cohesive whole.

*Map changes: goals and success strategies.*

1) Carve and set up a “me time” to nurture, replenish, and recalibrate early every morning before everyone else wakes up, do my hour of power to meditate, affirmations, chanting, exercise, and green drink for the day.

2) Connect with my guru daily, as my physical and tangible spiritual lifeline.

3) Do exchange peer coaching, make a three-month commitment at a time with a peer and/or book an ongoing mentor coaching with Dr. Dave.

4) Make Sundays a family tune-in time to assess schedules and activities, keeping in mind harmony and our sight on who we are becoming.

*Author new experience and program new experiences and identity.*

I, Sahaja, am a creative force of clarity, focus, and significance. My life is a moment-to-moment conscious choice of awareness. I dance to the tune of harmony and significance.

*Program new experiences & identity.*

I regularly tune in to my heart and at least daily ask what it is that makes my heart sing today, in this moment, in this circumstance, and in this event. What I am doing about it?

## **Megan's Life and Career Story**

Marlene Lariviere, M.B.A.

The following is a work page from the use of the ROADMAP for a New Life Story® by a health professional going through a career transition and life story revision.

FROM NURSING MY MOM

TO NURSING MY PATIENTS

AND FINALLY MYSELF

*Recognize authorship. You are writing your career and life story: from assumptions to every choice about you as a nurse, a mother, and partner.*

I am aware now that I am the author of my career and life story, although previously I saw myself as a victim of circumstances with very little power to change things. I notice myself developing a new language. I used to say I feel helpless because all these things happen to me to. Now my thoughts are more like, Yes, these things happen, but the choice of how to respond to them is entirely mine.

*Own your story. Choices are mine according to my ideals and needs.*

It is clear to me that I spent many years living my life according to others' expectations around me: my mother, my children, my partner, my boss. Now I can own my career and life story and hear the sound of my own voice to make sound decisions, knowing my needs and prioritizing them, without the fear of being selfish, without running the ultimate risk of not being loved, of being rejected.

*Assess plot and storylines. Recognize the behaviors, hidden messages, and elusive language of mind and emotion.*

A single mother, very domineering and often sick, brought me up, struggling to make ends meet. I always felt responsible for the way she felt, and I used to drop any activity to assist in her slightest need, especially when she was sick. My mother's nurse, I came to embrace nursing as a career. Although I like to help people, I realized that I could never set limits, the same way I could never say no to Mom. Therefore I prioritize other people's needs over mine until I am depleted or sick. Then and only then do I allow myself to take care of me.

Strange how my situation is exactly like it was when I was a child. I would have Mom's attention only when I was sick, and then she would say, "Poor Megan." I am now a woman in my 50s and I seem to repeat this pattern, most especially with the chief nurse. She reminds me so much of my mother's attitude.

*Decide what to change: Make informed choices about what story components to keep, let go, change, and enhance.*

I keep the skills and the ability to help people, but start considering myself as an important subject to take care of on a daily basis. I let go of being a people-pleaser who says "Yes" all the time to my boss, my coworkers, my partner, and my children. I let go of not setting limits early enough to make sure I prioritize my needs. I develop new ways of thinking and behaving. For instance, I feel much more available to help others when I am in good physical and mental shape. I am proud of myself when I take care of my needs, and I am not bitter as I might be when I am overwhelmed by being a Yes-woman. I let go of the script that I have to be "Poor Megan," exhausted, sick. I deserve tender loving care. It becomes more and more obvious to me that beliefs and patterns from my childhood created assumptions that drove my behaviors—notably the fact of pleasing people by always saying "Yes" to be loved and to feel lovable.

*Map changes: goals and success strategies.*

At work, I will be clear about my responsibilities and those of my boss or my colleagues. I will actively look for a position in another hospital where the work climate is much better. I will start slowly by setting limits and saying “No” whenever compliance would take me away from what I value. I need to set time aside for my needs and ideals, because I have adapted so much that I lost track of myself, of the fingerprint of my essence. For instance, I will not agree to babysit my grandchildren when this means taking away from my time to relax. I will say “No” to my partner when he proposes activities that suit his taste more than mine. I am starting to see that at times I was making assumptions about lots of things, to the point of creating obstacles between me and my important goals.

*Author new experiences. Create the new life story you desire.*

Now in my mid-50s, it’s about time that I take care of myself. I am starting to see that while the assumptions from my childhood might have been real at the time, today is totally different. I am now living my life as a caring nurse, caring mother, caring partner, but most of all caring for myself. I deserve it. I am worth it.

*Program new experiences and identity. Incorporate and sustain the changes by a corresponding internal growth.*

I notice myself developing a new language. Now my thoughts are more like, Yes, things happen, but the choice of how I respond to them is entirely mine. I feel empowered by the idea that I live my own life, rather than the life others want me to live.

I am worth taking care of myself. In order to do this, I will set limits and consider that “No” is a complete sentence. I will make sure I train on a regular basis, as it energizes me. I will also be gentle with myself by adding activities that energize me, such as going to a spa, having massages, and yoga. I will prioritize my needs over the needs of my children or my partner, being in touch with nature, doing outdoor activities, reading, meditating. I will experiment with a state where I am grounded, relaxed, and proud of all the steps and

milestones I am achieving on a daily basis. What I find helpful is being more attuned to myself, to the way I feel, to my gut feeling, to my intuition. The more quiet time I set aside for myself, the clearer I hear the little voice inside me guiding me to make proper decisions.

## **Addendum**

Careerwise Megan made a huge step, securing a position as a nurse in a residence for the elderly much closer to home. She works on an evening shift, something that she would never have considered before, fearing she would be too tired to do that and sleep properly. It is demanding work, but she is energized by the interactions with the patients. In her personal life, Megan has also made huge strides. Although she is still sensitive to other people's reactions, she has a reasonable doubt that they represent their own self-statements; the way they react and express themselves is more about them than it is a judgment on her. She is proud to be able to set boundaries so that she has the time and space she needs to recharge her batteries, to live, to breathe, and to enjoy herself. New thoughts, new feelings, new behaviors—in short, she is writing a new life story and has a blank page with which to begin every day.