

The Universal Change Journey:

An Overview for Finding Your Way Through Life's Toughest Challenges



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Introduction: All Change is Personal

In the fall of 1967 I began my freshman year at Syracuse University. Eager to find my place in a class of thousands, I joined Alpha Phi Omega, the national service fraternity. At one of the first meetings I attended as a pledge, we were approached for volunteers to help establish a Boy Scout troop on the Onondaga Indian Reservation. I stepped up, and shortly after found myself serving as the assistant scoutmaster. This was my first step into a journey I am still on today.



I soon realized that while the young men on the reservation didn't need scouting, they did need a safe place to gather with their friends; we provided that space. I also came to understand quickly that the university's mascot at the time, the "Saltine Warrior," was culturally offensive to Native Americans. I failed in my effort to convince the university to adopt a new mascot that year, but I have been on a journey of change ever since.

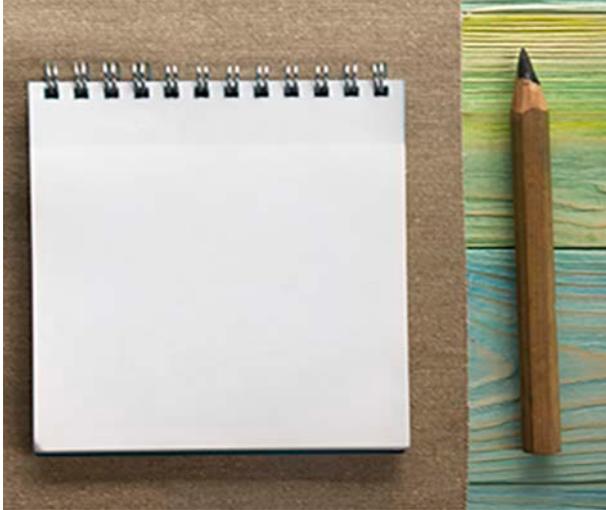
My journey has traversed broad social change. I have undergone significant change within organizations in which I have been employed, and have guided organizations through major change as a consultant. And, I have been deeply involved in personal change...my own, and that of clients I have worked with as a professional coach and change mentor.

This journey of nearly five decades has taught me a great deal about myself, and about change. At the heart of my learning are two important lessons that are the underpinning for all of the work that I do today, and of this publication. First, there is really no such thing as social change, or organizational change. All change is personal. As people change, their organizations change; as people change, their societies change. Second, while we tend to experience the changes in our lives as sometimes being very different, underneath they are the same. Because of this, succeeding at change is not about the nature of the change; it is about understanding how we respond to change, and finding the path that will help us navigate it.

The sameness of changes comes from how we as human beings respond to the disruptions that change brings. How we respond is universal. While the outward display of our responses may vary, the psychology of those responses is consistent. It is that psychology of change that has been my focus for decades...understanding the patterns of response, and learning to successfully navigate them. For the last two years I have sought to share my learning with others through my blog.

This short publication provides you with an overview of the change journey. It is a reframing of Joseph Campbell's "Hero's Journey," and consists of five distinct, though inter-dependent, phases: creating the change story, preparing for the journey, planning the journey, taking the journey, and living the new reality. Whether you are the hero taking the journey, or the coach, mentor, therapist, or friend serving as the Sherpa, understanding the nature of the change journey will improve the likelihood of its success.

Create Your Change Story



While a well-developed change story cannot guarantee the success of a change, a poorly developed one almost always ensures a less-than-optimum outcome...if not outright failure.

We know the power of story; we create stories for ourselves all the time, and we often share them with others. There's the story about that important conversation you're going to have with a significant other, or your boss, or a co-worker, or a client later today. You've probably replayed it in your head a dozen times or more, and in the retelling you have felt more and more prepared, or more and more scared.

There's the story about what you're going to do to relax this coming weekend, or on the next vacation. That one gets retold every time you feel over-worked or over-stressed; it lets you catch your breath and puts a smile on your face, at least for a moment. There is (or was) the story of "happily ever after," the first draft appearing before the emotion of the first kiss wore off.

Stories have power. Well-crafted stories can have tremendous power. Recent research in neuroscience tells us that when stories are experienced by those who hear, read or view them, the chemical effects on our brain, our body, and our emotions can be as powerful as if we were involved in the actual experience the story tells. This is the power of story, and why it is so important that before setting off on a change journey, a powerful story of the change is created.

So what is a change story, who writes it, when is it written, and how is it used?

What is a change story?

First of all, it is a story. It's not a plan, or a rambling flurry of ideas, or a wish statement.

Like many stories, it has a "once upon a time." However, the "once upon a time" is not in the past, it is now. The story is written from the future. "I'm really here." "I did it." "The finish line has been crossed!"

The change story is not just written from the head; it captures as many of the senses as possible. "I'm really here. Looking out I see... In the background I hear... My heart is filled with gratitude

for...” You get the idea. The change story speaks from the future, and it speaks of the journey to get there. It focuses on some of the key milestones along the way.

A colleague of mine and great change-story facilitator, Stephen Maye, uses as an example a family building a lake home. This is how he summarizes the milestones; even absent the full story you can begin to feel what it will be like, to know the experience.

1. Three Months: Visiting the site any time we want, and know exactly what the drive up from the main road is like.
2. Four Months: Experiencing the view from key areas of the property, and a sense of the view from our respective rooms. Can even camp overnight on the site.
3. Seven Months: A feel for walking through the place and being able to visualize the approach to the house. We can “camp” inside—entire weekends if we want!
4. Ten Months (Spring): A fully functioning house. Sleep in a bed, read in front of a fire, and have morning coffee on the back deck overlooking the lake. Not ready to entertain or boat.
5. Thirteen Months (Summer): Starting to boat. The dock and ramp are ready; enjoying the lake much like we imagined it.
6. Fourteen and Half Months (Mid-Summer): We are entertaining. Parking for everyone, easy to enjoy the lake to its fullest (boathouse), a place to gather outdoors in the evening (fire-pit, etc.), and guests are able to retire to a private apartment with a spectacular view.
7. Sixteen Months (End Summer): Final landscaping in; grass is established. And there is no sign of anything that says “construction site”. We enjoy the lake house just as we imagined it. Everything says “peace retreat,” (copyright Conner Partners, 2014, all rights reserved).

Note, it’s not: “1. Survey site, establish route for main driveway, mark and clear trees and underbrush.” The change story is about the experience, not the activity!

Who writes it?

The change story is written by those who are accountable for its successful execution. If it is your personal change, that is you; your partner or spouse will also need to be engaged if he or she is going to be carrying significant responsibility for its success. It has to be a story that is owned by those responsible for its success, and one that can be told...not from the head but from the heart. You wouldn’t ask your children, or a co-worker or neighbor or friend, to write your story of a major personal change. If you did, it would never be fully owned, embraced, internalized by you.

Each of us needs to own every change that affects us, even if we are not initiating the change; we should never elect to be victims of change. With this in mind, I recommend that even in these cases, you write your own change story. When doing so, recognize that if it is to serve the purpose of a change story, it needs to fit within the parameters of the larger story, otherwise it is just a fantasy. As I said earlier, all change is personal. That organizational change that is about to affect you in your current position is driving one, or more, change stories in your mind. Take

charge of them. Are you committed to staying with the organization through this change? If so, what will it be like for you when the change is a success? What are you going to do to make that happen for you? If not, what are you going to do to successfully transition, and to what and/or where are you going to make that transition? When? Take charge of your change story; don't let change take charge of you.

When is the change story written?

It may seem obvious. The change story is written at the outset. Once the decision to make the change has been made, the story-writing should begin. It takes concerted effort, and time. Don't get ahead of yourself with making plans or committing to actions until the story is written. The process of writing the story can bring forward some significant "Aha" moments, not all of which may be received positively. I have been engaged with clients who come to the realization when writing the story that they do not have the resources, or the commitment, to proceed with the actual change. Write the story first.

Then keep your eyes on the reality as the change unfolds. Be prepared to revise the story when needed. Perhaps the ground where the lake house is to be sited is less stable than needed, and pilings will need to be driven. If this is going to extend the construction time, reflect that in the story. It may no longer end "At the end of summer..." It may need to end "As the first snow falls." Other elements of the story may need to change as well. If you keep saying "at the end of summer," everybody is going to be whispering under their breath, "Yeah, right...dream on." As importantly, you know that your story is now a fantasy, and it loses its power to serve you.

How is it used?

Once the change story is written, it becomes the guide to preparing and planning for the journey. In the example above, we know that we need a contractor who will clear land, and we know when he or she is needed; the architect has a clear sense of our timeline, and a high-level understanding of what structures are (and are not) expected, how they will be sited, etc. We know what expectations to set for those who may be eager for an invitation to come visit us. In short, we know what to prepare for and when.

As the change unfolds, the story continues to provide guidance. When new change opportunities arise, they can quickly be assessed against the story. Would this new change contribute to taking this journey, and to achieving the desired end state? If it is not contributing to this change, what resources will it take away from it? Which is our priority?

It also provides motivation. Just like any other major change, the journey to the successful occupation of this lake home will include both mistakes and surprises. "When the going gets

tough” the story can reignite a sense of purpose and commitment that plans and the imagination cannot.

A few years ago, I worked with a client who had decided, in his 70’s, that it was time to come out as a gay man. Needless to say, not only was this a tough decision, it was a difficult journey. He often called on his story—experiencing waking up in his own bed for the first time able to be fully who he is in the world—when he met the inevitable challenges to making the story a reality. And, he successfully achieved that which for so many years had only been a dream.

Prepare for the Change Journey

Wait!

How can you prepare for the journey when you haven't yet planned it?

The truth is, you can't...at least not fully.

At the same time, if you begin by planning, it's likely that the only things you will prepare for are what you have planned...and I have seen that have disastrous results.



Preparation and planning are highly intertwined; my recommendation is to always start with some very specific elements of preparation, including those described here. Then when you get into the planning it becomes a much more effective process.

Inventory Your Anchors

Change is disruptive. Big change is highly disruptive. We all know this, yet we often fail to consciously use anchors to manage the disruption. An anchor is anything that helps to provide stability and keep us pointed in the right direction. It may be an individual's moral compass. It may be money; or reputation; or title; or family, friends, or community. It may be religion or a spiritual practice. It may be a home, a car, or other possessions. It may be a commitment: to have a family, to earn a professional degree, to not work evenings or weekends.

It is likely that if you are approaching a major change, you will need to completely let go of some anchors, and you will need to change your relationship to others. Your anchors are holding you where you are; they only allow a limited movement (if any) away from the present state. Some need to change, and others hold steady. For example, your decision to change careers may require you to earn a professional degree...one of your anchors. And, when you begin to think about how to do that, you may realize that your commitment to "not work evenings or weekends" will prevent you from doing so.

Down the road, it will also be important to know what anchors are unwavering; which ones you and others around you (whether family and friends or colleagues) can count on to hold you steady during the turbulence. So, the first thing that I recommend my clients do in preparing for a big change is to inventory their anchors. This is not the time to decide what to do with them; it is the time to become attentive to what they are.

Inventory the Changes

A big change isn't one change...it is tens, or dozens, or even hundreds of smaller changes. Planning the change will be a lot more successful if you know what those smaller changes are. Knowing this will also make the change easier to navigate. As Lao Tzu said, "The journey of a thousand miles begins with a single step." What are those steps, those changes, that your journey requires?

Don't make this a "count the grains of sand on the beach" exercise, dissecting each change into smaller and smaller components. (This is a particularly challenging thing to avoid for those who are into "dotting every 'i' and crossing every 't'.") Continuing with the earlier example, two changes may be: *make the appropriate adjustments to my anchor regarding evenings and weekends* and *earn a professional degree*.

Later you will get into the planning of how to make each of these changes. For now, what you want is an inventory of them.

Inventory Your Resources: What You Need and What You Have

With an understanding of the changes that you need to make, you have a deeper insight into the resources required to make them. They might involve specific time commitments (both time invested and elapsed time should be considered). You may need other people's involvement and support. Certain knowledge and/or skill sets may be required. Virtually every large-scale change demands a financial investment. Technology may be essential to moving forward. There may be real estate, equipment, and any number of other resources required. Create your "resources needed inventory" first.

With that inventory in hand, determine what resources you have, and what the gaps are. Filling in the gaps—or adjusting the change so that you don't have to—will have to be planned for.

Establish your Milestones

There's one more set of things that I like to have in place prior to beginning the planning: milestones.

Somehow we have a tendency to think that putting things in place will lead to the outcomes we want. "If Everett and I get married and buy a house in the suburbs, we'll be happy." "If I get my MBA I will have a successful career." "If the kids go to the right schools and participate in the right activities, they will get into the right colleges." There is a difference between installation (putting things in place) and realization (achieving the desired outcomes); installation is necessary, but it is not sufficient.

And, installation doesn't naturally evolve into realization. Both need to be planned for and worked toward. I can tell you with certainty, if your change is big and your sole focus is on installation, you will never achieve realization. For this reason, it is essential that you establish both installation *and* realization milestones. Returning one more time to the earlier example, *enroll in my first professional course* may be an installation milestone; it is a key indicator that you are making progress on earning the professional degree. A realization milestone might be to *complete a weekend of homework without having any negative feelings*; reaching this milestone would signify an important realignment in your relationship to your old anchor of not working evenings and weekends.

You now have your change story, a clear and compelling picture of your destination and how you will get there. You have an inventory of your anchors, those things that ground and orient you. You know the changes you will need to make in order to complete the journey. You have identified the resources you need, the resources you have, and the resource gaps. And, finally, you've identified key milestones both in terms of putting things in place, and in terms of achieving your destination.

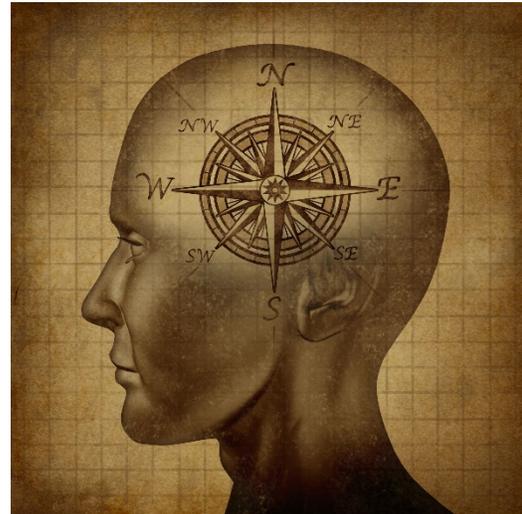
Preparation will continue to weave in and out during your planning and travels. In the meantime, you are ready to start your planning.

Plan the Change Journey

Man plans, and the gods laugh.

You have your change story. You have early elements of preparation: you've inventoried your anchors; your resources, resource needs, and resource gaps; and the changes you will need to make; you have developed an initial set of milestones. All of these serve as input to your planning process.

There is a lot that solid planning can do, and much that it cannot. Here are some of the key things that I have learned about change planning over the forty-plus years I have been developing—and executing—change-related plans.



Plan for What You Don't Want!

One of the big mistakes we often make when planning a change is failing to think about what we don't want to happen. Sometimes we catch the absence of this planning when we come face-to-face with an "Oh, No!" And, sometimes we only discover it after the fact.

What do I mean by this? Earlier I used an example of a career change that required the individual to work nights and weekends, something that was—in itself—a major change. When one goes from having nights and weekends free to working nights and weekends, it can cause a strain on personal relationships. If the hypothetical individual in this example didn't want to have his/her family relationships suffer, then planning should take this into consideration. What is the conversation that has to be had? When should it take place? With whom? How frequently will night and weekend work take place? How will this affect completing the education required to make the career shift? All of these things factor into the planning.

The best way to plan for what you don't want is to ask the question, *What could happen that we don't want to happen?* Then plan in a way that ensures, or at least limits, the possibility of it occurring. Don't get carried away. You will never be able to think of, or plan for, every contingency; but you can significantly lower the likelihood of going off track by planning for what you don't want.

Plan for Results, and Plan to Keep a Focus on Your Desired Outcomes.

All too often we are lured into a change for the results that it promises. Then, the planning focuses not on the results, but on the “things” that need to be put in place. Several years ago I created an e-Book for a client. *Painting the Room Blue* communicated this concept simply. If all you want is a blue room, then just paint the room blue. But if what you are seeking to do is to create a calmer environment then painting the room blue may be necessary, but it is not sufficient.

What shifts in thinking need to happen? What shifts in behaviors are required? What relationships (including but not limited to relationships with anchors as discussed earlier) have to change, and in what ways?

Again, don't try to “cross every ‘t’ and dot every ‘i.’” If you try to do so, you will be planning for years to come. Plan the near-term more deeply than the longer-term. Depending on the scope of the change, near-term may be four-six weeks, a few months, or perhaps longer. But remember, the further out you are planning, the more likely things will change and your plan will need to change. You already have thought through many aspects of your journey, so you are not “blind to” or “ignoring” the full change experience; you are acknowledging the reality that it will be filled with unexpected surprises, detours, and mistakes, and that detailed longer-range planning is likely filled with inaccuracies.

Plan for periodic status checks; find someone beyond yourself who you will “report in to,” someone who can help you be accountable, if only to yourself.

Don't Overload.

Change requires physical, mental, emotional, and spiritual energy. One of the biggest mistakes that gets made when it comes to change is thinking that the importance of the change, or the risk of not changing, or the reward of changing will be enough to carry the change to a successful conclusion.

Wrong!

We each have a limited capacity for change. A limited capacity for all the change we are experiencing. It could be personal change. It could include professional change. There might be social changes—in our spiritual or religious institutions, in our communities, or nationally—that are having an effect on us. There aren't separate buckets inside of us in which to put each of these changes. They are cumulative.

When we exceed our change capacity, every change suffers. When the proverbial “straw breaks the camel's back,” it isn't the last straw that falls to the ground; it is all of them, as well as the camel. So, one of the important steps to take when planning is to ask *What other change*

demands are there, either currently or in the foreseeable future? For each of these changes, determine how essential it is. If it is not essential, either put a halt to it, or be prepared to put a halt to it when change demand requires. If it is essential, there are several ways to reduce its change demand. You may intentionally decide to just put the key elements in place now (“paint the room blue”), while delaying the other elements of the change required for it to deliver its full benefit. You may choose to delay it; or you may extend the timeline.

Note, however, this is not “once and done.” Other demands will continue to come along. For this reason, it is important to plan on monitoring for symptoms of overload.

Plan to Put Things in Place.

It is likely that you don’t have everything in place that you will need to get you through a major change.

Your change may require budget management that wasn’t needed before. It may call for a more carefully laid out and managed calendar. It may call for reinforcing some anchors, while changing your relationship to (or cutting free) others. It may call for a physical relocation or physical alterations (e.g. the new career may call for the addition of a home office that is accessible to clients without having them enter the living quarters). It may call for new sources of income. All of the “infrastructure” that you need to succeed with the change should be planned for.

Take the Change Journey



Sometimes, "Just do it" is good advice. It may even work with smaller, incremental change. But when faced with a really large change it is a recipe for disaster. This chapter addresses some of the key lessons to keep in mind when taking your change journey.

Grant Permission

All too often, what stands between us and success is that we don't grant ourselves permission: permission to make mistakes, permission to take risks, permission to try something new, permission to experiment, permission to let go, permission to think and/or act in ways we have not in the past. Yet all of these things are key elements to successfully executing major change in our lives.

By definition, you are stepping into uncharted territory. Neither you nor anyone accompanying you has all the answers. Neither you nor anyone accompanying you will get through this mistake-free. Neither you nor anyone accompanying you will get through this "the way we've always done it." Grant yourself permission, and grant permission to those accompanying you, or you will never find your way to success on the other side.

Begin with the End in Mind; Keep the End in Mind

Remember, you began by creating the change story for a reason. A clearly articulated end state that everyone can work toward is critical to success. But, we are all human, after all. "Bright, shiny objects" do catch our attention. Your closest friend may ask you to start a new "can't lose" venture (or take an adventure) with her. Maybe it's an article you just read, or a documentary you just saw. "Crises of the moment" also have the ability to easily distract us.

Every day, ask "What am I doing today to move this change forward?" Every day, ask those who are supporting you in the change, "What are you doing today to move this change forward?"

When those bright shiny things appear, ask yourself, "How will this help us move forward with the change?" If it won't, why pursue it?

When those crises arise, ask yourself, "How will this affect progress toward the goal?" All too often, supposed crises appear urgent, and yet they are unimportant in the context of your change.

Monitor Adaptation Capacity

Put too much change on the plate, and it will all come up short of its goals. Don't keep enough on the plate, and you fall short of your potential. Think of it as training for the Olympics; you need to keep stretching...giving yourself enough time for rest and recovery, and then stretching again.

How do you know when you have stretched to the limit? One of the most effective ways to monitor this is to learn the changes in individual behavior that signal the onset of overload. These can get very idiosyncratic, but they are always there as early warning signs of overload. I once had a person working for me who was extremely sharp. Anna could keep all of my clients straight in her mind: their names, the organizations that they worked for, the work I was doing with them, etc. I quickly learned that when she began to talk about clients and confusing their organizations or the work we were doing with them, it meant that Anna was in overload. First, I made it okay for her to acknowledge that; we all have a limit to our capacity. Then, whenever she crossed that threshold, if she didn't notice and approach me first I would ask her to help me figure out what to "take off her plate" (literally stop doing, or postpone, or extend a deadline for) so that she could again move forward successfully.

Don't Forget That the World Is Changing Too

I live in a former slide rule factory. I learned how to program on computer punch cards. When I entered the workforce, the expectation was you would get a job out of college, stay with that employer, advance (or not), and ultimately retire from the same employer.

The point here is, the world keeps changing. In a recent study, 91% of millennials reported that they expect to stay in their current job less than three years. The slide rule was replaced by the electronic calculator was replaced by an app on the smart phone. 88% of the Fortune 500 companies of 1955 are gone.

Keep your eye on the destination of your change journey. But also keep your eye on the changes going on around you. Any one of them could signal the need for a change in the route you are taking, or the need to stop and rethink the destination itself.

Maintain Balance

One of the more difficult challenges for those I work with is maintaining a "work/life balance." At the end of the day, all change is personal...individuals either deliver the end result, or they don't. Maintaining balance is a way of contributing to maintaining capacity...the more stressed we are, the more tired we are, the less capacity we have to invest in a change. Maintain your

own work/life balance; work with those who are on the change journey with you to ensure that they do the same.

Monitor Your Progress

Monitor progress toward your milestones. Don't just monitor "installation;" ensure that you are tracking progress toward the actual outcomes you want to achieve.

Monitor risks. Watch for early warning signs. The sooner you see a risk, the greater the opportunity to do something about it without it growing and doing significant damage to your progress. (One client I work with says it this way. "Red is good. Red is good when risks are surfaced early and actions are taken to mitigate those risks.")

Celebrate

Don't just celebrate the beginning of the change ("Yeah, I got into the MBA program I wanted!") and the end. There is plenty to celebrate along the way. Not every celebration has to be huge. And, not every celebration needs to be about success. Celebrate effort. Celebrate mistakes. Don't get carried away with it, but the fact that you gave yourself permission that you have never given yourself before is cause for celebration. The fact that you experimented with something you never permitted yourself to experiment with before is cause for celebration, even if you made mistakes along the way. Celebrate progress in whatever form it takes.

Live the New Reality

Each change journey comes to an end. If it has been successful, you will be living the new reality that you defined when you created your change story. In *The Art of Pilgrimage*, Phil Cousineau wrote, "The challenge is to learn how to carry over the quality of the journey into your everyday life. The art of pilgrimage is the craft of taking time seriously, elegantly."



"Returning Home"

If this was a big change, you and those who accompanied you have learned a lot. Your thinking has shifted. Most likely you have cut loose some old anchors, redefined your connection to other anchors, and established new ones. You may have developed new skills. Priorities may well have shifted. It's likely that you are acting, thinking, and perhaps even looking, different.

Don't be surprised that life is different now. Even if your physical "home" is the same, you are not. You are living a new normal.

Reflection

Take time to reflect, and to catalogue what those changes are and how they occurred. As different as every change is, the underlying patterns are the same. What can you discern from this journey that may be of use on your next one?

Intention

If this was a big change, and it was successful, there was a clear intent from the start, and there was a concerted effort to remain true to it throughout the journey. Your success required, as Phil Cousineau said, "taking time seriously, elegantly."

Now that the journey is over, what is your intention? You need to identify it, to declare it, to commit to it if you are to "carry over the quality of the journey into your everyday life."

What You Passed By

"How long the road is. But, for all the time the journey has already taken, how you have needed every second of it in order to learn what the road passes by," (Dag Hammarskjold, *Markings*).

What did you pass by in order to take this journey?

Of all those things, which are best left "passed by?" Which are worthy of now attending to?

Stop, Start, Continue

The end of the change journey is a "stop." It could be that the stop came slowly, as you maneuvered your way along the path and overcame the obstacles that awaited you. Or it could be that it came surprisingly quickly as synchronicity helped move you over the threshold. Either way, don't let the mental, physical, and psychological energy that you were investing in the journey be eaten by all the urgencies that now arise.

Pay attention to what is now important; invest there. Now that you have reached a "stop," you have the ability to intentionally make another "start."

Celebrate

This is special. Treat it as such. Find a way to honor yourself, along with all of those who made the journey with you. In the business world, research says that only about 30% of organizational change initiatives deliver on their promise. At the personal level, we may do better. But whatever the statistics are, if you were in it and "win it," celebrate!

To Find Out More

Benjamin Franklin is quoted as saying, "In this world nothing can be said to be certain, except death and taxes." That may well have been true in his day; today, change is also certain. The pace of change, the volume of change, and its complexity all continue to accelerate.

Difficult change will always be difficult. But understanding change and how to navigate it can take away some of the uncertainty, help to ease (if not somewhat simplify) the journey, and improve the likelihood of success. That is the work that I have been doing, as a coach, consultant, and change mentor, for more than four decades. And through my work I have helped dozens of organizations, and thousands of people, on their change journeys.

Whether you are planning a major change or are in the midst of one, whether you think that you are on-track with a change or are finding yourself stuck and uncertain, I am prepared to be your change coach.

I look forward to learning more about your journey, and exploring how we can best work together to help you move toward success.



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