

Chapter 20

Overview of the Wellness Compass Journey

We are at our very best, and we are happiest, when we are fully engaged in work we enjoy on the journey toward the goal we've established for ourselves.

—Earl Nightingale

Life is the ultimate adventure, with highs, lows, and plateaus. Each of us is a traveler in his or her own life's journey. Many times we can't reach our final destination (our goal) in one trip but require wayside stops or benchmarks along the way. At the stops, we rest, reassess our plan, refuel, and retool for the next stop. At times, because of new threats or opportunities, either our benchmarks or our ultimate goal changes, and we tweak our plans accordingly. In terms of wellness, each destination represents a different stage or state of your well-being at a different time in your life. Where you go and how long you stay at each peak, plateau, or valley is your choice. We are each led by our desired personal wellness vision.

Professionals utilize tools specific to their trade to ensure their success. For example, Ethan Hunt, Tom Cruise's character in the recent Mission: Impossible series has his motorcycle and his cool weapons, and he is trained to use them to overcome any villain in his path. Carpenters who build strong foundations need wood saws, hammers, and nails; farmers who plant and reap harvests have soil, tractors, seeds, and a lot of water; doctors have stethoscopes, bandages and many different ways to detect and treat ailments. To prioritize, strategize, and execute successfully, wellness travelers also need skills and tools; that's why the Wellness Compass Journey was created. This template will help you develop and hone the skills you need. You too can successfully accomplish your mission!

Recall, the Wellness Compass is a simple depiction of the infinite scope of wellness with four primary directional domains and a pivotal center of balance. The Wellness Compass Guidebook (part 2 of this book) is a compilation of resources for each wellness domain and goal that are designed to affect your travel decisions and to enhance your knowledge and appreciation of where you could go and how you could get there. The Wellness Compass Journey (part 3, also referred to as the Journey) is your generic travel plan. It is a template for lifelong Wellness Journey planning—your guide to the successful accomplishment of your goals.

Highlights of The Wellness Compass Journey. What You Need to Know

★ **Chapter 21, Tools to Facilitate a Successful Journey**, provides travelers with a standard process, tools, and guidance that can be used repeatedly to effectively accomplish any goals. It's a robust three-step process that, as illustrated in figure 20.1, is specifically designed to guide travelers through the standard decisions associated with the entire process of goal attainment. It can be used for a single goal or used to accomplish multiple goals over any time period. It is specifically designed to facilitate holistic assessment across the entire spectrum of well-being, and to create realistic action plans.

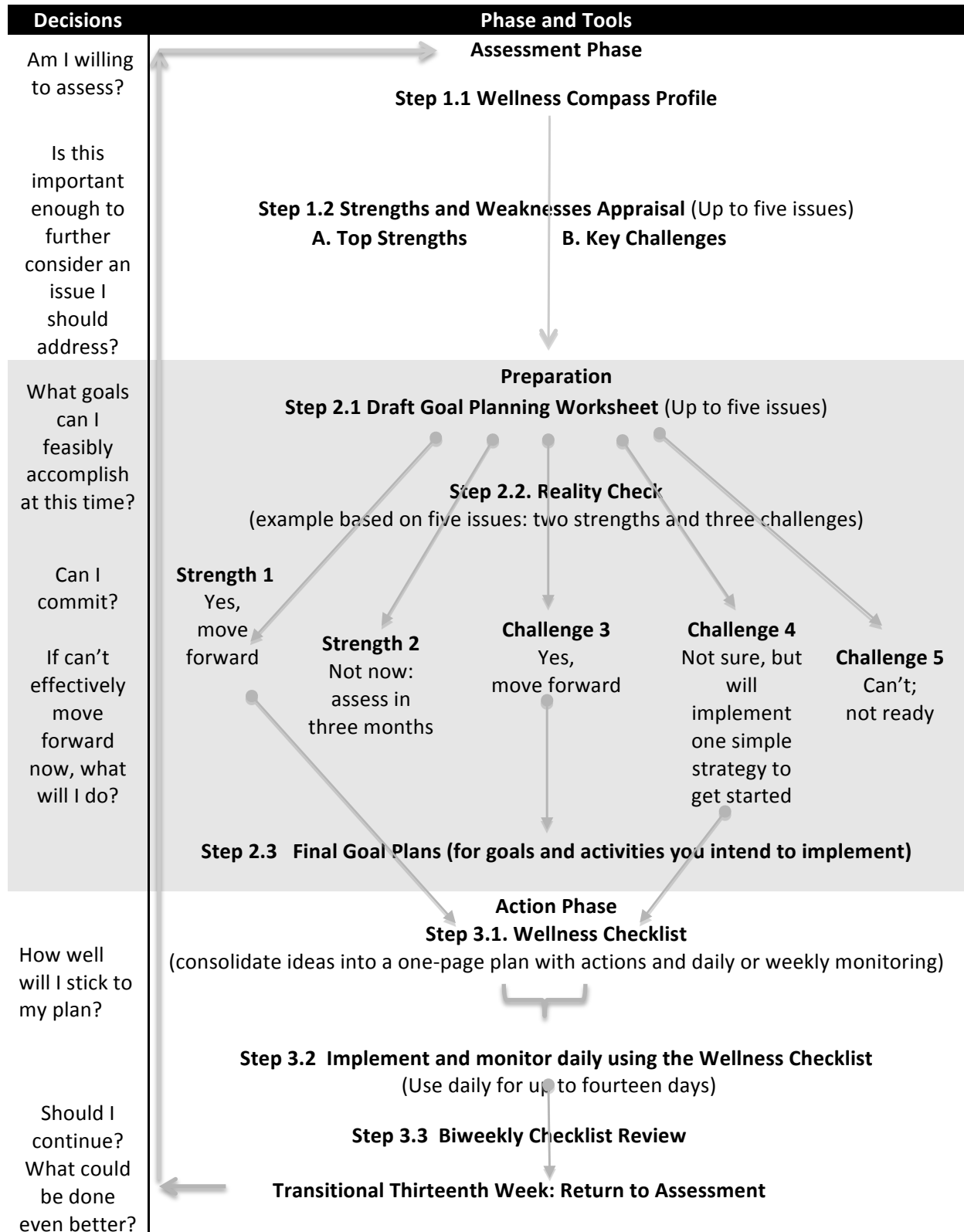
To facilitate your success, generic tools for each phase of your journey are provided with directions in chapter 21. As noted in the italics while travelers are expected to use each activity the first time they proceed in the process, several activities are designed to either be used periodically, to be used for every single goal considered, or for multiple goals implemented concurrently.

Assessment Phase

Step 1.1 The Wellness Compass Profile (*Use quarterly*)

Step 1.2 Strengths and Challenges Appraisal (*Use annually*)

Figure 20.1
Wellness Compass Journey by Step (Phase), Decisions, and Tools



Preparation Phase

- Step 2.1 Initial Goal Planning (*Use for a single goal*)
- Step 2.2 Reality Check (*Use for multiple goals*)
- Step 2.3 Final Action Plan (*Use for a single goal*)

Action Phase

- Step 3.1 The Wellness Compass Journey Checklist (*Use to implement multiple goals*)
- Step 3.2 *You take action by implementing items on your checklist for two weeks*
- Step 3.3 Biweekly Checklist Review (*Use as needed to review progress effectively*)

- All forms are available for download in a portable document format (*.pdf) from <http://wellnesscompasstravelguide.com/journey/downloads/>. A master Wellness Compass Journey Checklist—a single-page document on which you can track the progress toward your goals and strategies for a two-week period—is also available as a Microsoft Excel spreadsheet.
- **Assessment Phase (Step 1).** In this phase, travelers collect data to get a better idea of where they want to go on their Journey, (i.e., they define all possible wellness goals). Step 1.1, the Wellness Compass Profile (an assessment of your overall well-being), is ideally completed quarterly. Step 1.2, the Strengths and Challenges Appraisal is designed to be completed once a year to acknowledge strengths and to prioritize personal wellness issues on an annual basis.
- **Preparation Phase (Step 2).** In this phase, travelers narrow their goals to those they can implement with confidence. This phase begins with drafting plans for each goal (step 2.1) and then comparing goals and assessing confidence (steps 2.1 and 2.2), until travelers feel confident enough to draft a Final Action Plan (step 2.3) for each goal they desire to pursue over the next three months. If a goal pertains to one of the Wellness Compass goals, travelers are encouraged to review the corresponding sections in part 2, “The Wellness Compass Guidebook,” before they finalize an action plan.
- **Action Phase (Step 3).** At this point travelers are poised to effectively take action on their Journey in order to implement, monitor, and reassess progress based on an integrated two-week wellness plan referred to as the Checklist (step 3.1.) At the beginning of each Journey, a master Checklist is created and labeled with a cycle number (e.g., 1.1) so you know which two-week cycle the travelers is currently on. The Checklist outlines day-to-day or weekly activity and the measures the traveler uses to accomplish goals, serving as a personal two-week contract. Implementation consists of taking desired actions based on the Checklist and monitoring progress. At the end of each two weeks, the traveler is encouraged to do a quickly bi-weekly reassessment of progress and decides whether or not to update the Checklist, thereby allowing the traveler to tweak the plan as progress is made. If progress is being made, travelers are encouraged to continue their actions for a total of six two-week journey cycles (1.1, 1.2, 1.3, 1.4, 1.5, and 1.6) for a total of twelve weeks.
- **Transitional Week.** Each quarter, between weeks twelve and thirteen, travelers are encouraged to reassess and prepare for a new Journey by investing in a week of rest and planning. During this last week, travelers decide to either retain practices (i.e., stay in that wellness destination at a comfortable plateau) or move toward a new destination, thereby pursuing a new travel plan. Thus, the next Journey cycle could commence with either a new Wellness Compass Profile, a variation of the previous Checklist (typically focusing on maintaining or enhancing previous goals), or a decision to not pursue any goals at that time.
- **Suggested Use.** You are encouraged to utilize each of the Wellness Compass Journey tools at least once, for a minimum six-week Wellness Journey (three two-week cycles). Start simple with either a single goal or two related goals. Feel free to start with a single goal if the process seems overwhelming and to adapt resources to best fit your needs.

★ **Chapter 22: Backsliding Prevention and Recovery Tips** . No one is perfect all the time. All travelers should expect periods of lower levels of success simply because of unforeseen events or other priorities. Travelers should expect greater challenges for issues that involve a high degree of change, sacrifice, or emotional turmoil. The Wellness Compass encourages travelers to know the most common warning signs of backsliding and to have a tune-up plan in place for when they first notice waning motivation, increasing temptation, or decreasing levels of progress.

★ **Chapter 23: Maintaining Your Wellness Lifestyle.** The Wellness Compass Travel guide designed as a guidebook for a lifelong journey. Travelers who have a long-term vision approach their well-being with a different mind-set. Because of this conviction, their time, resources, and efforts are viewed as investments—deposits that one will harvest annually. This is referred to as a wellness lifestyle. Activities aids travelers in considering a commitment to maintain a high level of well-being across any or all domains for two or more years, even if the Wellness Compass is not utilized.

Note: Travelers who are health professionals, experienced at wellness, or otherwise want to clarify their vision of holistic long-term wellness are encouraged to do activities 23.1 and 23.2 prior to the Wellness Compass Profile (activity 21, step 1).

★ **Chapter 24: Packing for a Lifelong Journey.** The Wellness Compass concludes by providing suggestions for successful packing. Travelers are encouraged to prioritize and maintain their top 20 wellness essentials as a visionary component of establishing and maintaining their wellness lifestyle.

Will Assistance Help?

The Wellness Compass Journey and tools are designed so travelers with a high school diploma can successfully and independently complete the entire process on their own. However, some of us have greater challenges or more complex lives than others. Some issues merit expert support. Undeniably, most of us, even experts themselves, will benefit from having at least another caring, informed person assist in the evaluation and planning process, cheering us on as we implement changes and providing constructive ideas on what could be improved.

Who are the so-called experts who may be able to help?

Credentialed experts are considered as authorities because they have specialized knowledge that you don't have, and their knowledge and experience can facilitate your journey to a better outcome. Most credentialed health and wellness coaches can assist you through the entire process, providing constructive, inspirational support and monitoring that can be crucial to your ultimate success, particularly the first time. However, some problems go beyond the scope of these generalists and require experts who have specific credentials such as the following:

- ◇ physical and mental health: health professionals with specialties (e.g., psychiatrists, oncologists, physical therapists, psychologists or other clinically certified counselors, registered dietitians, and certified nutrition specialists)
- ◇ financial security: accountants, loan officers, investors, financial planners, lawyers, etc.
- ◇ school counselors or mentors for a specific aspect of your life
- ◇ spiritual well-being: pastors, rabbis, and priests
- ◇ fitness: certified personal trainers and exercise physiologists

Most experts can be located on the Internet, in connection with their credentialing organization or their state association. While you'd ideally like to work with the best, it may be important to find an expert who has the time to work with you and whose services you can afford, at least to start.

Chapter 21

Tools to Facilitate A Successful Journey

Journey tools were created for lifetime use. They are designed to facilitate your progress through all stages of your goal accomplishment, regardless of the goal or its difficulty. After you've used them once, the process becomes more familiar and you'll be able to integrate Journey process into your own personal planning, organizing and management systems, either online, on your phone via a phone application, in a weekly or monthly calendar, or in a journal. Own it; live it!

This chapter provides tools specific to each phase of your Journey: assessment, preparation, and action. Only a single copy of each form is provided in this chapter. You will need additional copies as you progress through your Journeys. Additional copies can be downloaded for free from www.wellnesscompasstravelguide.com. The Wellness Checklist (like the Life's Purpose Game) is offered online as a master Microsoft Excel file. Using the editable documents makes it much easier to continue and adapt the process to best fit your needs.

If you don't like paperwork, you really don't have to fill in every worksheet every time you attempt to accomplish a goal. You could use a journal or your own format as well. However, at least in the mind of the author, if you haven't completed step 1.1, the Wellness Compass Profile, then you truly haven't applied the Wellness Compass approach, and if you don't attempt the entire three-step process for at least six weeks, you haven't completed a Wellness Compass Journey. That's okay too, as what you do is your choice. Just be aware that critical aspects of decision making are embedded in the Wellness Compass Journey worksheets. It's possible that if you don't use them, you may miss a key consideration that would either have been very helpful or changed the direction you pursued.

Technical Notes

Journey tools were created and tested based on research, standard planning, wellness-coaching principles, and real-life experience. All documents were created by the author based on years of personal experience and wellness-coaching experience, and were utilized by book reviewers and/or real wellness clients. They are all either self-assessments or open-ended questions, with no right or wrong answers. They are essentially in the public domain. Others professionals are encouraged to use and adapt these documents with acknowledgment that they either were created by Joda P. Derrickson or adapted from this book, *The Wellness Compass Travel Guide*.

The Wellness Compass Journey

Step 1: Assessment Phase

Use these activities to comprehensively prioritize wellness issues that are most important to pursue at this time.

The assessment phase is designed to provide an integrative big-picture profile of your well-being across all four wellness domains and balance. It is an overall reality check. It deliberately requires a comprehensive assessment to make sure you are truly working on the goals that are most important to you—not just the easy issues or those yielding mostly short-term benefits. This type of big-picture assessment could be completed as often as every three months but is highly encouraged at least once a year for five years—or until you have maintained high levels of well-being and a balanced life to your satisfaction. Wellness travelers pursuing just one specific goal don't need to complete the full process of step 1a and step 1b the first time they apply *The Wellness Compass Travel Guide* approach, but they are encouraged to do so either on an annual basis as a part of their New Year's resolutions or as the first component of their second Wellness Journey (whichever comes first).

To make your assessment most accurate, feel free to add other issues, data (e.g., health measures), and big deadlines and events over the next twelve months that are not included in the Wellness Compass Profile. If you are doing this as a New Year's resolution process, be sure to really celebrate previous accomplishments and the key factors that enabled your success.

Step 1.1: Wellness Compass Profile.

This two-page assessment provides a comparative assessment of

- each of the thirteen Wellness Compass goals;
- all five domains of well-being; and
- an overall composite total—the Wellness Compass Profile.

It can be used to compare strengths and challenges within and across goals and domains. With repeated measurement, it can also be used to assess progress over time. Assessment of each goal is based on your responses to three statements. Follow the directions on the form to score each question, each goal and each domain, and determine your overall total. The Wellness Compass Profile total is a sum of the five domain totals (a maximum of two hundred points). Generally, scores of 90 percent are excellent; 80–89 percent, very good; 70–79 percent, moderately good; and less than 70 percent, challenges that warrant attention.

Remember: The utility and credibility of the Wellness Compass Profile assessment is based on your honesty. To confirm your own assessment, I encourage you to ask another person who knows you well to independently assess you using a Wellness Compass Profile and to then compare your results with their results to see how similar they are. Seriously consider others' scores on questions that literally are others' perceptions (not yours) and for responses that differ from your response by more than two points.

Note. Travelers who are health professionals, experienced at wellness or otherwise want to clarify their vision of holistic long-term wellness are encouraged to do Activities 23.1 and 23.2 prior to the Wellness Compass Profile (Activity 21. Step 1.1).