

Activity 20.1 Step 3.3: Biweekly Checklist Review

Use this process to review progress on your checklist and determine how you will proceed.

What Worked well? Study and celebrate your success! After a two-week cycle, pick out at least three things that went really well and describe either why they worked, what you learned, or how you can repeat them in the future. Or add a progress note on the bottom of your Checklist.

Did you implement your activities as planned? Analyze whether you completed activities as expected and when expected, and indicate what needs to change. Or make notations in a red pen on the Checklist; put a check by every activity you want to continue as is, put a line through those that aren't working, and then add in the new activities.

Do you have the correct measures? Consider each measure. Is it the best you can use? Does it confirm that you completed the activity the way you wanted to? What could be better? List changes either below or make notations in a red pen on the Checklist.

Overall, how well is it working?

Working well

Working okay

Not working

The plan is okay; I didn't execute it well

If you can confidently say both your plan and your implementation are working well, or if you feel you are moving in the right direction or prove so by your measures, that's *great!* Even if it's okay, you may need more time or tweaking. If it's not working and you implemented well, figure out what needs to be changed. If you think the plans are okay but you really didn't implement them well, be sure to read chapter 25 before finalizing your decision on how to proceed.

Will you continue? How or when?

If yes, will you change your Checklist? If no, why not? See the next page for descriptions of options.

___ Yes No changes

Edit current Checklist

Make new Checklist

New Wellness plan

___ No.

Why not? What do you need to get started again? When could you do this?

Possible scenarios after assessment with desire to continue.

◇ No changes

This means you want to maintain aspects of this Checklist and continue the exact same plan. All you change for the next Checklist is the cycle number (e.g., “Checklist, cycle 1.2”) and the dates. If you continue in this manner, you could label the next iteration of this Checklist “cycle 1.3.”

◇ **Edit Checklist**

This means you are editing the activities or measures to create a better or updated variation of the original plan. In this case, you change the cycle number (e.g. “Checklist, cycle 1.2”). You start by filling in the top line with your new cycle number and updating the dates. Then add in your vision and goals. It is absolutely okay to keep tinkering or making small changes to any part of your Checklist. Finally, for each goal, with consideration of your previous Checklist evaluation, edit your actions and measures. Repeat as needed.

◇ **New Checklist plan**

If you’re in an assessment phase between weeks twelve and thirteen it’s an ideal time to revisit your previous step 1.1 assessment and step 1.2. preparation documents. You can also create a new plan or a new Checklist when you think you were not making progress based on the activities you established in your previous Checklist and really want to think the process through again for either the same goal or a very similar goal. You’ll benefit from investigating different strategies and different ways to implement change, and from getting input from experts. Also, acknowledge your perseverance and progress. Note that if you are already thinking about maintaining a wellness lifestyle for at least two years, you may want to read chapter 23 first.

◇ **No plan**

Sometimes you either need a break or you are in a transitional phase in your Wellness Journey because of crisis or other life transition. If this is your situation, I encourage you to choose a date in your calendar when you will revisit your Wellness Journey, essentially returning to your Journey at a better time. The Christmas holidays and vacations are typically times when we either don’t have a plan or we purposely relax the reins in our Journey so that we can prioritize the holiday and our time with others. Other times, for whatever reason, we choose not to continue. Sometimes we have a relapse, and we give in, give up, or otherwise revert to the behaviors and activities that occurred before initiation of the plan, leading to some backsliding on our goals. If this occurs for a time period of two weeks or less and you become motivated again, jump back to your most recent Checklist, tweak it to reflect what you learned in your relapse, and keep going! If your relapse continues for more than two weeks, please see chapter 22 for additional insights on how to best proceed.

Continuation of the action phase: weeks three to twelve

Most of the time, you’ll be making minor edits to your plan based on your schedule, plans, and progress. In such cases, you will just update your Checklist cycle every two weeks. Recall that changes are expected and that how long you implement any one Checklist is up to you.

Return to the assessment phase: week thirteen

After the sixth cycle, it’s time to go back to step 1 and reassess your wellness goals to see if it’s best to keep going to maintain your progress, add in a new strategy, or make a new goal. Even if you are very successful with a Checklist, it’s important not to lose sight of the other goals, priorities, and events in your life as you evolve. It’s easy to get out of balance! No matter what, other aspects of your life will change! That’s why it’s recommended to go back to the assessment phase after every twelve weeks and spend a week reassessing what’s most important before commencing on the next phase in your lifelong Journey.

Regardless of how you did and how well the plan worked, below are a few ideas to sustain you.

- **Stay focused by revisiting your goals and vision daily.** Keep focusing on how good it will feel to achieve your goals and vision, and how proud you and your close friends will be of your accomplishment. If necessary, review the consequences you drafted in step 2.3 to remind yourself of why it’s so important to achieve this goal.

- **Amp up the volume.** Use daily meditations, reaffirmations, music, and prayer to do what you need to do to stay motivated.
- **Reach out.** Ask for assistance in all ways you are comfortable with. Allow others to keep you accountable and to support you on your quest. Even if you thought you were going to be able to accomplish the process independently, don't hesitate to invest in a wellness or life coach or an expert. If you do, share as much as you can with him or her so you don't have to recreate the process and so he or she can learn how much you've already accomplished.
- **Lighten the load.** If you are feeling overwhelmed, perhaps you simply took on too much too fast. Consider what you can do now, and consider postponing continuation of other activities for future implementation or downsizing expectations (e.g., moving from four workouts a week to three, or from twelve hundred to fifteen hundred calories). Adjust your Checklist accordingly. Acknowledge that making a change is very appropriate, wise thing to do. It's much better to be slow and steady, like a turtle, than it is to be like a rabbit, who is fast but can't maintain his speed. Always remember that this is a journey—a process. No one expects you to get it 100 percent perfect the first time, or any time.

Keep celebrating your success. Share it. Believe it. You are making progress.