



Insurance Agents
& Brokers

2024 SELF COACHING WORKBOOK



IA&B Self Coaching Program

Self-coaching is the practice of regular self-reflection, decision-making, goal achievement and intentional growth that is self-led. The core of self-coaching is the belief that with the right tools, allowing them to access their unique wisdom and purpose, each individual is their own best guide and coach. Each individual becomes the creator of their own success story. Self empowerment and self-trust are the ultimate goal of the practice of self-coaching.

There are a variety of different tools and modalities that contribute to the effectiveness of self-coaching, as well as skill sets that are universally beneficial to your self-coaching practice.



This program is designed to offer participants the opportunity to develop their skills and confidence in using these to create an effective, ongoing self-coaching practice. Empowering them to guide their own personal development intentionally and positively. By the end of the program, participants will have a well practiced skill set and the capability to facilitate their own growth through self coaching.

The Core Self Coaching Skills

Effective self-coaching requires learning and implementing four core skill sets. Each of these skill sets contributes to an overall ability to self-manage and make significant progress in personal or professional development. Each skill set also compliments and facilitates the others so it's recommended that all four are learned for the greatest benefit.

The core skills are derived from evidence based modalities based on cutting edge understanding of human behavior and neuroscience, used in coaching, therapeutic models and professional development. Used together, they represent an holistic approach to growth and are foundational to well-being.

The four core skills that form this program are:

01 Emotional intelligence

The ability to be aware of how our emotions impact and govern our lives. Knowing how to manage and express your emotions in a healthy productive way, as well as awareness of the emotional experience of others.

02 Mindset Mastery

Harnessing the power of how we think in order to influence our actions, our responses to challenges and our outcomes. Mindset mastery also allows us to tap into our most effective problem solving and creativity.

03 Nervous System Regulation

Understanding and managing our body and brain's response to stressors both in our environment and within our own mindset. This allows us to manage stress and avoid overwhelm, freeze and burnout.

04 Capacity Management

The awareness and management of our own inner resources, including time, attention and focus in order to maximize productivity and progress in a healthy, sustainable way.

Essentials 1

In the first core skills workshop we'll be covering the following aspects of the four core skills.

Mindset and Emotional Intelligence.

- Mindset Foundations
 - How and why to coach yourself.
 - Practices and habits for powerful mindsets.
- Understanding emotional intelligence and the role it plays in our success and well being.
 - Emotional processing
 - Solving procrastination as an emotional management issue.
- How mindset and emotional intelligence work together.
 - Using cognitive modelling to feel better and problem solve.

Nervous System Regulation

- Understanding the nervous system and its impact on all aspects of our lives.
- Basic nervous system regulation tools.

Capacity Management

- Understanding how capacity governs our time management and productivity.
- Strategies for increasing capacity and getting more done with less stress

Mindset Management

Mindset is crucial because it significantly influences how we perceive and react to challenges, setbacks, and opportunities. This means that how we think about ourselves, the world around us and our opportunities or challenges, has the power to affect our lives. It's useful to think about our mindset as the programming that our brain operates. Much like the operating systems our phones or computers run on. That programming determines whether or not our device works well and functions in a way that we want it to. Poor programming leads to bugs and crashes, just like unhelpful mindsets can.

An intentional and supportive mindset can:

Determine Our Success
Affect Mental Health
Influence Relationships
Shape Resilience and Adaptability
Enhance Motivation and Engagement
Improve Performance
Cultivate Innovation and creativity

Overall, mindset is a powerful influence on our personal and professional outcomes, impacting how we approach every aspect of our lives.

Most people believe that their mindset is a fixed thing, automatic and out of their control because as people, we generally believe that whatever we think is just fact. Our mindsets are simply the result of learning and programming from a variety of influences. Due to our brains incredible ability to learn and adapt, we can change our mindset at any stage of our lives.

The purpose of learning to manage our mindset is to have greater control and influence over how we approach our experiences, challenges and opportunities, become more intentional and create greater success.

How to Manage Your Mindset.

Awareness - Making the subconscious conscious

The human brain has approximately 60 thousand thoughts per day, almost all of those lie in the subconscious. With most of our habitual patterns, emotional responses, beliefs and cognitive bias stored in the subconscious, its essential that we access them in order to change and influence them. Its a little like accessing a hidden folder with all the files that operate your computer. Your subconscious contains most of the files that dictate our thoughts, feelings and behaviors. We have to open them up before we can change them and save the new versions.

This means that our first step is accessing our subconscious by becoming more aware of our thoughts

Tools to gain awareness

Journaling.

Journaling is a great way to understand your mindset better. By writing down your thoughts and feelings, you can start to see patterns in how you think, whether positive or negative. This simple act of reflection helps you catch automatic thoughts and beliefs that might not be serving you well. Over time, journaling boosts self-awareness, making it easier to spot your triggers, strengths, and areas where you can grow. It's a gentle way to become more mindful of your thoughts and behaviors, helping you develop a healthier, more balanced mindset.

Journaling can be done in a free form style or benefit from prompts. There is no wrong way to journal.

Thought Download.

Like journaling, thought discovery tool allows us to understand our mindset better. It's a more targeted tool that allows us to explore our thoughts or beliefs about specific topics or experiences with the intention of isolating individual thoughts to examine and self coach on. To do a thought discovery, simply start by writing your topic, theme or experience at the top pf a piece of paper and write all the thoughts that come to mind about that topic.

It's important that you do not judge, second guess or try to change the thoughts as you write them. The way we think, how we phrase things, and the specific words we use can leave very useful clues.

Using the space below, chose a topic or situation for exploration and do a thought download of the thoughts that you notice. Write as many down as you can, without second guessing or changing them.

Topic -

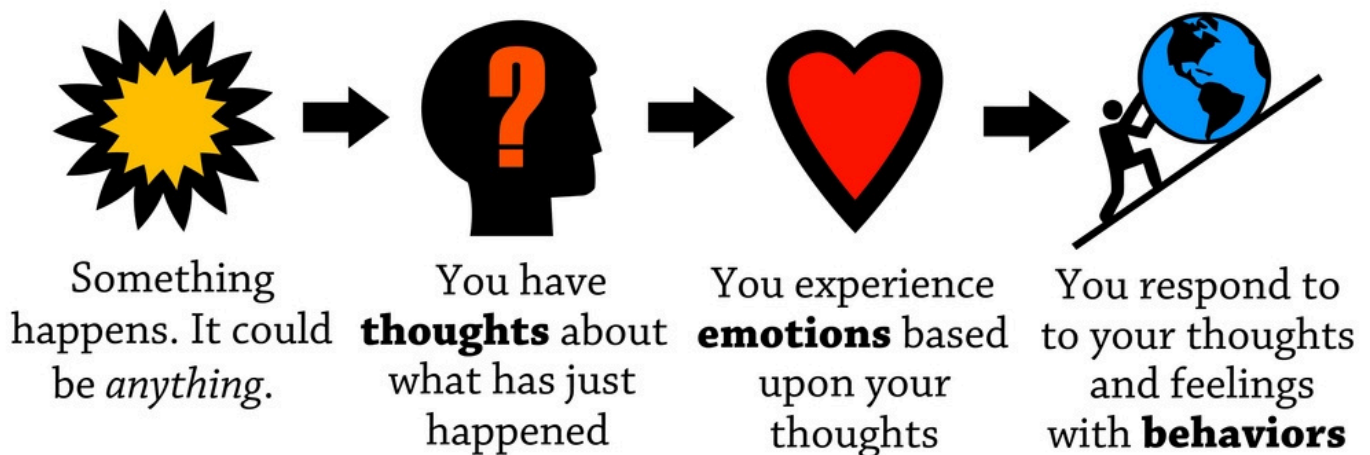
Examining Cognitive Models.

The Cognitive Model, developed by psychologist Dr Aaron T Beck is a tool that allows us to look at our thoughts in a framework that shows us how our thinking creates our emotional experience and drives our actions. Using a simplified version for self coaching, we can understand our mindset in more detail in order to start changing it.

The Cognitive Model

The Cognitive Model

**how you think determines how you feel
and how you behave**



Taking some thoughts from the thoughts discovery, build cognitive models of each for practice.

Fact -

Thought-

Emotion -

Actions -

Outcome-

Fact -

Thought-

Emotion -

Actions -

Outcome-

Fact -

Thought-

Emotion -

Actions -

Outcome-

Fact -

Thought-

Emotion -

Actions -

Outcome-

Fact -

Thought-

Emotion -

Actions -

Outcome-

Assessing the Cognitive Model.

Once we have found our thoughts about a situation in a thought download and put them into the framework of the cognitive model, we can access the mindsets we've uncovered and begin to make decisions about what to do next.

Looking at each cognitive model you've created ask yourself the following questions.

- Do I like the outcome this thought creates?
- Do I like how I feel?
- Is this thought / feeling / outcome useful for me?
- Do I want to continue thinking / believing this thought?

If during this evaluation you decide that you do not want to hold onto this thought, then you can begin working to change it and replacing it with something that is more useful.

We call this, creating intentional cognitive models, or thinking on purpose.

Re-framing and Creating Intentional Mindsets.

Re-framing in cognitive modeling is about looking at situations from a different, more positive angle. Instead of getting stuck in negative or unhelpful thoughts, re-framing helps you see things in a way that's more constructive. For example, if you make a mistake, you might re-frame it as a chance to learn rather than a failure. This shift in thinking can change how you feel and act, leading to better outcomes. In cognitive behavioral therapy, re-framing is a helpful tool for turning unbalanced thoughts into healthier, more positive ones.

Using the thoughts that we are examining in our cognitive model, we can start to intentionally choose different ways to view experiences, which leads to us taking different actions. Ultimately getting different outcomes.

There are many ways to re-frame our thoughts, the most powerful is by asking ourselves questions that challenge the thoughts. Below are some examples:

- Is this a generalization or worst case scenario thinking?
- Can I absolutely know that it's true?
- What would happen if I thought the opposite?
- If I felt differently about the situation, how would my thinking change?
- How might someone watching the situation as a movie with no emotional attachment interpret this?
- What am I making this mean about myself?
- Who would I be without the thought?
- What do I want to think or feel?

These questions are just a starting point to help you build the skill of questioning and re-framing. The underlying principle is to imagine that there is another way to think about the situation, and explore what that might be.

It's important to remember there is no "right" answer to any of these questions. Re-framing is an individual process and the best way to know if you're making progress, is how you feel.

Working with a coach or a trusted self coaching partner who can ask you these questions can also be extremely useful. Creating the opportunity to voice your thoughts and talk through the re-framing often helps us uncover new and more useful mindsets as it allows us to process the questions differently.

Important - A note about re-framing and trauma. This tool is meant to help us find a different perspective that allows us to move forward rather than be stuck in a mindset that is creating unhelpful outcomes for us. It is not to be used in a way that denies, gaslights or diminishes our lived experiences. If at any point, re-framing your questions triggers panic or severe anxiety, it may be best to pause this work and explore getting support from a mental health professional in a therapeutic setting. You can continue learning the skill of self coaching once you've got more support in place.

Using a couple of example thoughts from the cognitive models you built, experiment using the re-framing questions with each.

Thought -

Re-frames -

Thought -

Re-frames -

Practicing Mindset Management.



Mindset management is not something that we can do once and be done. Because we will always be experiencing new things, some of them challenges, mindset management is a skill that we learn to use in those moments where we are faced with obstacles. With enough practice, being able to manage our thoughts and reactions becomes more automatic.

How to practice.

Make a habit of sitting down with your thoughts regularly. Every day is ideal but at least once a week. Use the tools we've covered in sequence to get the most out of your practice.

1- Thought Download.

Start by choosing a topic or an incident and write out all your thoughts about it, unfiltered until you naturally run out of thoughts.

2- Fill out the Cognitive Model.

Chose one thought at a time and start filling in the model to see how the specific thought makes you feel, what you do in reaction and what the outcome of that thinking is.

3- Decide what you want to think.

Evaluate if that thought is creating something useful or if it's unhelpful and you want to change it.

4- Re-Frame.

Use the Re-Framing tools to create an intentional replacement for that thought.

5- Practice the new thought!

You can use it as an affirmation, remind yourself of it though journaling, or intentionally redirect your thoughts to the new thought any time you notice the old thought come up. Practice until the new thought becomes automatic!

Emotional Intelligence

The capacity to be aware of, control, and express one's emotions, and to handle interpersonal relationships judiciously and empathetically.

Our ability to understand and manage our emotions is a key part of our success. As we can see from our work with the cognitive mode, our actions and behavior are often in response to how we feel. The more influence we have over how we feel and how we manage our emotions, the more are able to choose our actions and ultimately our outcomes.

Using the cognitive modeling tool we can start to become more aware of the types of emotions we are experiencing. We can deepen this understanding by learning more about our emotions, the differences between them and how they feel, and how we respond to them.

It's important to note that emotions are multifaceted. Some of our emotions are involved in our nervous system activation, which requires slightly different tools to work through. Some are also influenced by trauma responses, which are not appropriate to deal with through coaching.

The main tools we're going to use to develop greater emotional intelligence are The Emotions Wheel, Naming and Processing.

Important - As with mindset work, there are times when when therapeutic intervention is needed. If at any stage you experience an emotional response that triggers panic or severe anxiety, it may be best to pause this work and explore getting support from a mental health professional in a therapeutic setting. You can continue learning the skill of self coaching once you've got more support in place.

The Emotions Wheel.

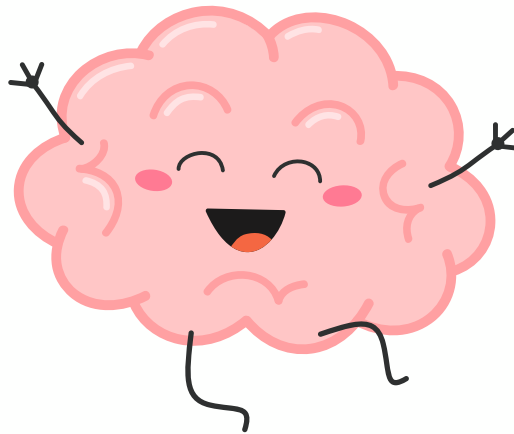
The more specifically we are able to identify an emotion the more information we can get from our experience in order to change how we're responding. Most people are able to identify just a handful of feelings but there is a huge range. There are around 80 positive emotions alone!

The Emotions Wheel allows us to start getting more specific with our feelings. Please note, the wheel is not a complete catalogue of emotions.

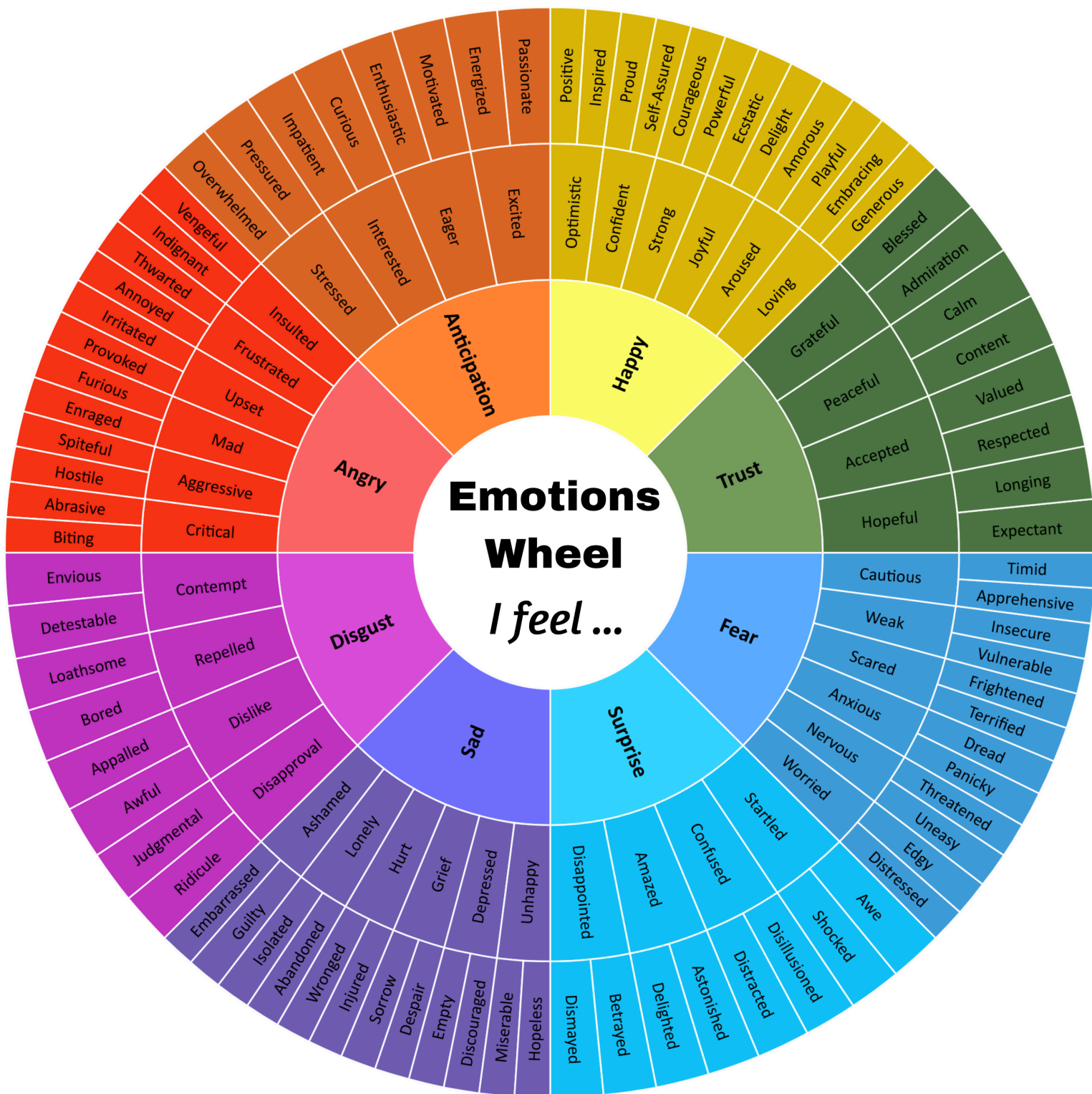
Using the wheel, start by identifying the primary feeling. These are the feelings in the center of the wheel. Think of them as the category of emotion you're feeling. From there, work your way outwards to find the specific emotion you think you're feeling. At first it might be tricky to differentiate between similar emotions, but the more clear you get on the differences, the more it helps you to understand your reaction to a situation.

Once you've found the emotion you're feeling, we use that knowledge in order to move onto the next tool. Naming and processing.

There is an emotions wheel on the following page that you can use as a reference. It contains some of the most commonly experienced emotions but it is not a comprehensive list, so if the exact emotion you're feeling isn't on there, don't worry! You're not doing it wrong.



Note - There are also a number of Apps available which are a great tool for helping you learn the skill of emotions identification as well as allow you to track your feeling trends. "How We Feel" is a free app designed by researchers studying emotional intelligence and is one of the most comprehensive available.



Naming and processing.

When we experience any emotion, our brain starts to operate on a kind of autopilot in response. We can find ourselves taking actions or displaying behaviors automatically, as though we aren't in control and it's just an obvious reaction.

For example, when another driver cuts us off on the road we might find ourselves automatically responding by yelling. It seems like the "right" reaction, but our brain has prompted it automatically in reaction to how we feel.

However when we want to change how we react to things in order to change our outcomes, we need to be able to process the emotion we're feeling without reacting to it.

In naming and processing we allow ourselves to "step outside" of our emotion and experience it differently. First by acknowledging which emotion we're feeling, and then by feeling each physical sensation produced by the emotions without reacting.

Neurological research shows that by using this process we can work through and let go of an emotion in around 90 seconds. This is the process of "feeling our feelings."

Using the previous example, naming and processing might look like this:

Another driver cuts you off on the road and you notice you're feeling the urge to yell. First, you would name the emotion:

"I notice that I'm feeling angry, and more specifically Indignant. How dare that person cut me off!"

Then we begin to feel the physical experience of angry or indignant by noticing what's happening in our body.

"I'm noticing that I feel hot. There feels like there's a rush of energy all over my body. My stomach feels tight and heavy. There's tension in my arms and I want to clench my fists."

As you spend more time becoming aware of the physical sensation of the emotion the intensity of the feeling will start to dissipate, as though the emotion has run its course. This allows us to process and release the emotion without taking any actions in response to it.

Naming and processing is a skill, which means that it can take some practice in order to do it consistently. Initially it might be harder to describe the physical sensations. If you find yourself struggling, try starting with asking yourself a few questions like the ones below.

- Where can I feel this emotion in my body?
- Is the feeling moving or does it stay still?
- Does it feel hot or cold?
- Does it feel fast or slow?"
- How would I describe it to someone who has never felt an emotion?

Try practicing with both positive and negative feeling emotions.

What is the emotion that you are feeling?

Naming:

Describe how the emotion PHYSICALLY feels:

Processing:

What is the emotion that you are feeling?

Naming:

Describe how the emotion PHYSICALLY feels:

Processing:

The importance of “feeling our feelings.”

Being able to process our emotions is a useful skill in order to make our actions, and therefore our outcomes more intentional. There is however another, very important reason for feeling our feelings.

The part of our brain that is hardwired for survival has a very clear and simple mission; steering us away from the three D's

Avoid all death danger and discomfort.

Unfortunately, our survival brain doesn't differentiate between the discomfort of being chased by a bear or the discomfort of having a big important project on at work, and so responds to both as though they are something to be avoided. In the case of the bear, the brain instructs us to run away physically. In the case of the big project, we run by doing something else. This avoidance often shows up as procrastination.

While we often think about procrastination as a personality trait or behavior, it's actually our brain trying to avoid difficult emotions that it perceives as harmful.

Task

Cold calling a prospective client

Thoughts about
the task

**They might slam the phone down.
What if they think I'm pushy?
It's not going to make a difference.
I suck at sales.**

Emotion

**Rejected
Defeated
Worthless**



The brain responds to the “danger” of discomfort by suggesting we do something that feels better.

Avoidant Action

Scroll on Instagram for 45 minutes

When we have learned the skill of naming and processing our feelings, we teach the survival part of our brains that those feelings aren't a danger to us. We can feel them and release them, and then shift our focus to thoughts and feelings that help us take the actions that we want.

Task

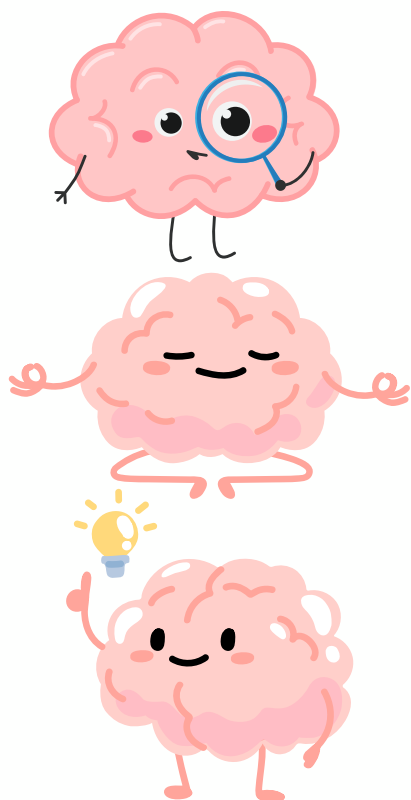
Cold calling a prospective client

Thoughts about
the task

**They might slam the phone down.
What if they think I'm pushy?
Its not going to make a difference.
I suck at sales.**

Emotion

**Rejected
Defeated
Worthless**



Naming

I notice I'm feeling Rejected /
defeated / worthless

Processing

It feels like a heavy sinking in my
stomach. Its slow, sticky and
buzzes with a low rumble. it
makes my body want to crumble
up into a very small ball.

Re-framing

I've had successful cold calls before.
Any rejection is of the product, not of ME.
I'm learning how to get good at sales.

New Emotion

**Determined
Neutral
Motivated**

New Action

Make the call

Practicing Emotional Intelligence.



Like with Mindset Management, Emotional Intelligence is a skill set we need to practice until it becomes our automatic way of approaching our emotional experiences. With enough practice, you will be able to do it automatically without even noticing. You'll just feel better faster.

How to practice.

Make a habit of sitting down with your emotions regularly. You can do this in an intentional practice where you deliberately bring up an emotion to explore, name and process, or you can do it throughout your day as you experience day to day life. The process is the same, but if you're deliberately setting aside some time, it's useful to journal about the experience as you go.

1- Identify what you're feeling.

Give yourself a moment to pause and ask "what am I feeling?"

2- Name the emotion.

Using your emotions wheel, or just exploring your own experiences of your feelings, figure out the specific emotion you're feeling and name it. Sometimes doing this out loud can be helpful.

3- Process the emotion.

Spend some time looking for and feeling the physical sensations happening in your body. Track and experience them until you feel them start to disappear or ease.

4- Document.

It's valuable to journal or document some of what you notice while processing your emotions. You'll often be surprised about what you can learn about yourself over time through this practice.

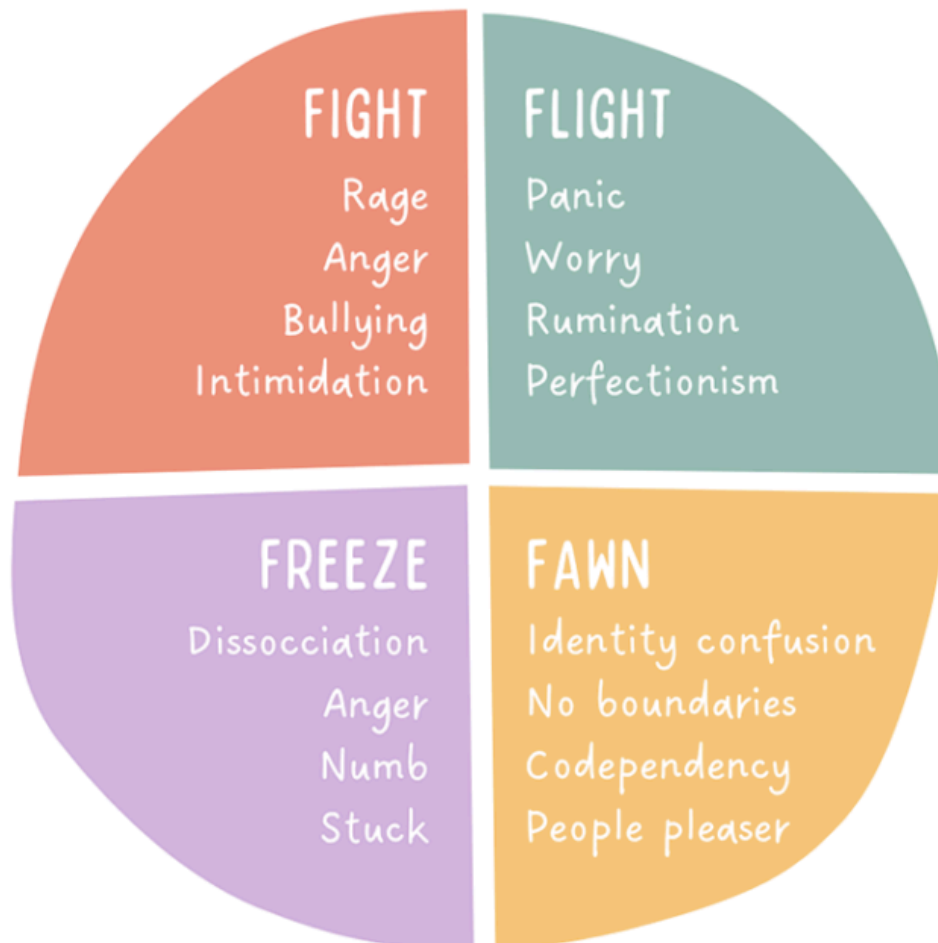
The Nervous System

The human brain is an extraordinarily sophisticated machine that largely runs its own processes without any conscious input from us. Everything from breathing and our heartbeat, to digestion and hormone production runs on an automated process governed by the Autonomic Nervous System.

Part of this automated process is the sympathetic nervous system which is involved in our instinctive survival mechanisms. Its whole function is to prepare you to respond to life threatening danger.

When our brain identifies a potential danger, it limits all non essential processes, like digestion and access to creative thinking. It raises the heart rate to get more blood circulating around the body, and releases adrenaline and cortisol, readying us to escape the danger through fight, flight, freeze or fawn.

Once the danger is passed, it regulates itself and goes back to neutral standby.



Unfortunately, our brain doesn't recognize the difference between being chased by a bear and having a huge deadline at work. Or between being left out in the elements where we could die, and being left out of a group invitation to a party. Or even between being in danger of attack and the neighbors playing loud jarring music.

Our modern world, paired with our own thoughts and emotions, offers our sympathetic nervous system excessive opportunity to be triggered into a state of readiness. This ongoing regular activation can lead to feeling constantly anxious, overwhelmed or burned out.

Regulating the nervous system.

The two approaches to nervous system regulation are ongoing, long term practices that allow us to operate in a generally more calm and deactivated manner, and in the moment deescalation tools that let us “turn down the volume” in order to get through whatever experience we’re faced with.

Long term tools include practices like:

- Meditation
- Yoga
- Deep breathing exercises
- Low intensity exercise (anything that doesn't get your heart rate very high)
- Good nutrition
- Social support and connection
- Time in nature
- Rest and good quality sleep.

You'll notice that all the tools are things that impact our physical body. Nervous system activation is a physiological reaction, and needs us to calm our body in order to regulate.

Quick tools

Sometimes we need quick in the moment tools that allow us to turn down the volume on our nervous system activation so we can move forward. Below is a short list of tools, there are others that you can experiment with until you find ones that suit your needs.

The Heart Hold

Place one hand on your chest with firm pressure, directly over your heart. Place the other on your stomach over your belly button. Take several deep breaths into the pressure of your hands, paying close attention to the physical sensation of your hands presence.

This tool gives us a tangible “anchoring” point which mimics the experience of being held. It reassures our body and then our brain that we are physically safe.

Widening peripheral vision

Choose a spot ahead of you and relax your gaze to star at it. Slowly try to widen your gaze, expanding your peripheral vision until you're able to see as much around you as possible while still staring at your original spot

Widening our field of vision is the opposite to what our brain does automatically when it thinks there is danger. This sends our brain a message that we're not focused on danger and therefor, safe.

Grounding

This exercise can be done in a variety of ways, but the key is to use your physical senses to become hyper aware of your physical experience. Anything you're able to do that bring you into a very present state and paying attention to your senses can be used as grounding. Examples of grounding are.

Asking yourself to name:

- 5 colors you can see.
- 4 sounds you can hear.
- 3 Scents you can smell
- 2 textures you can feel.
- 1 taste you can identify.

Changing the spin

When we feel anxiety or fear, we often feel a sense of energy spinning in our bodies. To use this tool, start by locating where the sensation of spinning is in your body and notice which direction its moving in. Next, imagine that you've moved it outside of your body so that you can see it and reverse the direction. Keep your attention on making it spin the other way until you feel at ease.

Practicing the quick tools

Pick a tool to practice and prepare by letting yourself think about a recent stressful experience. Allow yourself to visualize it and remember it as clearly as possible. Once you notice that you're having an emotional reaction, pause and identify the action and the sensations you're experiencing.

Now apply the tool and notice what changes.

Repeat this exercise with the different tools and using different memories to see what kinds of emotions you can impact using these tools.

Quick tool:
Stressful situation:

Emotion:
Sensations:

What changes:

Quick tool:
Stressful situation:

Emotion:
Sensations:

What changes:

Quick tool:
Stressful situation:

Emotion:
Sensations:

What changes:

Quick tool:
Stressful situation:

Emotion:
Sensations:

What changes:

Capacity & Time Management

Time is fixed. We only have so much of it. Capacity can be built, is flexible and ever changing

The concept of capacity management requires us to accept the reality that time is a fixed and finite resource. Traditional time management asks us to do things as fast as possible in order to squeeze in as many tasks as we can in order to be more productive.

This often has the reverse effect as it results in us over burdening our mental and emotional capacity, while not allowing for recharging due to the scarcity created by focusing on time. We tend to become less focused and productive over time, leading to less of our tasks being accomplished in a timely manner and ultimately poor time management.

By instead focusing on the PERSON doing the tasks and their mental and emotional capacity first, and the time management second we can undo the damage done by a culture of “do more, faster, at any cost.” When we build a person's capacity, they tend to be more focused and more resilient. Tasks seem easier because they aren't approaching them with exhaustion and dread. This helps cut down on procrastination and lets us get things done in a more efficient way.

- Capacity building is a combination of:
- Considering the person before the time or the tasks.
- Understanding our energy and focus cycles.
- Being honest and realistic about our tasks and time, and dropping perfectionism.
- Being strategic about the tasks we take on and why.
- Creating plans that are achievable, honor our essentials needs and offer flexibility.

This allows us to lower stress, reduce procrastination, ensure there is availability of needed downtime and increase productivity. We can't make more time, but we can create more capacity.

Time Audit

Looking at what we are spending our time on and why

There are several ways to do a time audit. Below are two options, one looking at trends based on categories. The second by doing a reflection of your day by tracking what you spend time on. It's recommended you do both as they offer different types of data.

To do the category audit, consider the following areas of your life and answer the question prompts.

What is the breakdown of time spent on?"

Work

Family connection

Life logistics (Includes things like laundry etc)

- Home
- Personal

Social

Self

- Health
- Hobbies
- personal development
- Spiritual

Online (Includes any time not intentionally. Eg working or actively having conversations)

For each aspect of your time spent consider the following questions.

What are you prioritizing and why?

Which activities did you choose vs ones you feel obligated to do?

As you assess each activity, what personal value or priority does it reflect?

How does each activity add to or detract from your goals in that area of your life?

Which activities use capacity?

Which activities build capacity?

To do the day by day audit, track what you spend your time on in a typical week. Record what you do and how long approximately you spend on each item. Once you've written everything out, you're going to first start to look for some patterns.

Where are you spending the most time?

What's something you seem to be spending way more time on than you thought?

WHY do you do each of those things?

Who else could be doing those things?

What are some things you do because you feel you should, not because they are actually a priority?

What's there that you forget takes time?

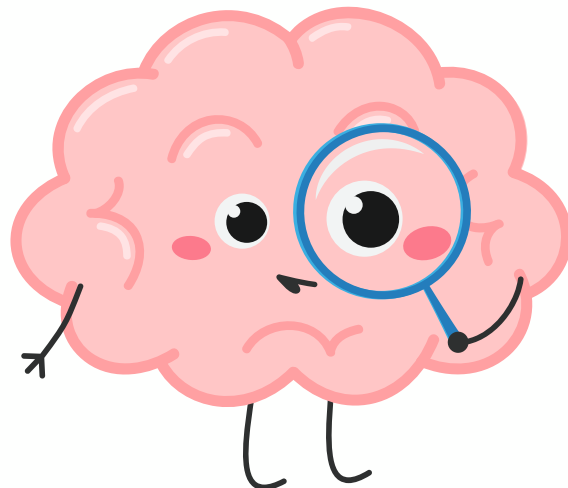
Where are there gaps, dead or wasted time?

What activities are for YOU vs for others?

What's working?

What's not working?

Where are you not allocating enough time?



Prioritizing.

Identifying the non negotiables.

After evaluating the time audit we can start to make decision about what things we DO want to spend our time on. Take the activities that are non-negotiable or that already have an allocated time & place (like dropping of kids at school) decided how much time you genuinely need for them and add them to whatever calendar system you use as an appointment.

By doing this we can now see what capacity we have available for the other tasks or activities on our list.

Overflow Blocks

In order to increase our capacity and help stay on track, we can partially anticipate life's emergencies and changes to our plans. Often when we overfill our schedules it only takes one change or even small disruption to throw everything off. By adding on Overflow blocks, open blocks of time in our plan, we create space. If we have to drop a task because of an emergency or something takes longer than we thought, we can use the extra time we have already out aside to get it done so that everything else stays on track.

An overflow block can be something you schedule once a week, say for an hour, or daily if you're able. If you have children or are responsible for elderly parents etc I recommenced adding a small overflow block every day of at least 20-30 minutes.

If everything goes smoothly, you'll have extra time on your hands to use as you please!

Rest and Recharge Capacity

Our ability to be productive relies not on how much time we have, but on how much capacity we have. This is like our battery. Just like we would recharge our phones before using them, we have to recharge ourselves too.

As part of your non-negotiable activities, ensure that you're committing to making time to recharge. This is a very individual experience so whether you choose to have 15 minute "mirco-breaks" or time for yoga, walks or building puzzles, ensure that you're adding in something during your week that's designed to allow you to recharge.

Putting it into action

Creating a system that works requires some experimentation so initially its useful to plan 1 week in advance at a time. Aside from the “non-negotiables” already on your calendar, start by writing out a list of everything you think needs to be done in the coming week.

Once you have the list, you’re going to go through each item and prioritize everything into the following categories.

Urgent - These are things that **MUST** be done in that week & there will be serious consequences if they don't get done. Due date: this week.

Important - These need to get done but no serious consequences if it doesn't happen this week. Due date: between this week and the end of next week.

Nice to have - These would be great to get done but here is no urgency or need to have them done. Due date: later than 2 weeks or possibly no deadline.

When you’ve allocated everything to your categories, go through each item and give it a time frame; how long you think its going to take. Make sure its realistic so try not to over or underestimate how long you need. You can also evaluate this as you go to see if your estimate is accurate.

Adding The List To The Calender:

Once your list has been sorted and you've allocated time frames, you’re going to add your activities into your plan / calendar.

Starting with URGENT then IMPORTANT and if there is any space left add any NICE TO HAVE items into the available time you’re willing to spend on them. If you don't use the overflow blocks you can also add nice to have items to those time slots.

Anything on your Important or nice to have lists then get kept and when you do your planning next week add them into the initial evaluation of what needs to be done.

Mindset

Following the plan.

Having a great strategy makes it much easier to know exactly how you want to spend your time and help you get things done, but following the plan requires us to understand our mindset. This is something that can be done with journaling, coaching or even counseling, but it starts with us asking ourselves questions about the things we want to do, or what we believe, like “I should be doing more.”

For example, I might have “write report” on my plan but I keep ignoring it or having multiple things happen which “force” me to put it off and I can easily convince myself I just don't have time. But if I stop to ask myself “How do I feel about doing this?” I might notice I feel dread. Then I'm going to start asking myself why. Doing this I might discover that I don't feel confident about writing it, that I'm afraid I'm going to do it wrong, or some other thought which effectively makes me just avoid it.

Knowing WHY we aren't doing something, helps us to know what problem we actually need to solve, most often “I don't have time” is just a way we let ourselves off the hook for things we are avoiding.

This is a great opportunity to use the mindset tools to understand how you think and feel about your plan and any tasks you're struggling to complete.

Using the tools we can turn dram, overwhelm or procrastination, into determination and motivation.



Another common mindset issue that prevents us from following our plan is distractions. Some we have direct control over, like:

- Phone notifications.
- Emails.
- Treating any communication or text as urgent.
- Allowing ourselves to jump from task to task or multi tasking.
- Not being clear about what is an actual problem or emergency you're willing to shift your focus to.

Others, we can't control but we don't have appropriate boundaries around, for example, when other people have requests on our time. Without healthy boundaries we might:

- Think that when someone asks us to do something we have to drop everything and do it now.
- Prioritize what other people want above our own plan.
- Always saying yes to requests for time.

To begin addressing these, start with journaling and mindset management tools or even just asking yourself some questions about each distraction.

For example:

Why does this feel like a priority?

Is this a priority for me or for someone else?

What am I afraid will happen if I say no?

Why am I checking my phone right now?

What do I think would happen if I waited another 15 minutes to message / email back?

By starting to explore what's driving our distractions, we can find useful information to start creating change.



This workbook is meant to be a reference guide for the tools covered in the first core skills workshop and represents the beginning of growth. These tools are meant to start you on the path to a more positive and focused mindset and greater emotional awareness. These tools can also take time to implement and practice until they become second nature.

Please allow yourself compassion, grace and patience as you learn how to make these practices a part of your every day life.

For additional reading, these are some great books that reference this work that you might find useful.

The Emotions Code - Bradley Nelson

Loving What Is - Byron Katie.

Finding Your North Star - Martha Becks

The Anti Anxiety Tool Kit - Melissa Tiers

Zebra Don't get Ulcers - Robert Sapolsky



Thank you for joining me in this workshop!
-Tarryne West