

**DIGITAL VERSION AVAILABLE ON PROGRAM WEBSITE:**

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# Introduction to the Workbook for Overturning the Immunity to Change

I’m delighted to have you as my official coachee who will go through the Immunity to Change (ITC) journey with me, the purpose of which is to support you to meet your improvement goal. We will be using this workbook to guide us.

This workbook, developed by Lisa Lahey and Robert Kegan, is based on the Immunity-to-Change framework they developed through their many years of research on how people change. Their methods are specifically designed to help people make the personal changes that are most important to them but have proven resistant even to thoughtful plans and heartfelt intentions. The approach first generates a personalized picture of the way our current mindset produces exactly those behaviors which prevent progress on the goal we most want to achieve. This is the immunity to change. Once we see the real source of what’s been preventing change, we understand why our usual approach of focusing on behavior change only doesn’t work. Instead, we need to focus on changing our mindsets, the source of our counter-productive behaviors.

Kegan and Lahey’s approach guides us on this new path to achieving change. The workbook captures the heart of this approach through a series of structured exercises, the purpose of which, collectively, is to help anyone motivated to change to be successful.

The format of the workbook consists of a series of exercises, which are completed over the course of approximately 5 months. I will be adding an exercise every few weeks. While each coaching journey may not need all these exercises during its coaching lifecycle, we will discuss each step together and decide on whether to apply it in our context. Given this is a learning context for both of us, I’m hopeful that we will experiment with most of them. Each exercise is briefly explained, and there is room for you to write your responses. If you use this workbook like a journal where you add your thoughts for each “assignment,” and I also add my responses after your thoughts, you will have a complete, chronological account of your overturning the immunities to change by the end of the process. I strongly encourage you to write your reflections and observations along the way. Experiences have indicated that when people devote even a half an hour a week to this process, they can make significant headway in their Column 1 goal, as well as other areas in which their Big Assumption operates.

The basic set of activities Kegan & Lahey recommend for overcoming an immunity to change are below, listed in three phases, with a simple statement of the purpose of each so that you can get an overview picture of what we will be doing in our work.

I’m looking forward to our co-learning!

**Opening Moves: Setting the Stage**

Exercise 1: Honing Your Map: Review and revise your immunity map, as needed, so that it feels powerful to you and you have a testable Big Assumption.

Exercise 2: Time-One Survey: Get external input on the importance and value of your Column 1 Goal, and create a baseline of how well you are doing on the goal at the start of the process.

Exercise 3: Continuum of Progress: Envision what full success looks like in achieving your Column 1 goal.

**Middle Game: Digging into the Work**

Exercise 4: Self-Observations: Tuning in to The Big Assumption in Action & Observing Counter-Examples of the Big Assumption: Deepen your understanding of your Big Assumption, including when it “runs” you and when it is inaccurate. Draw on the results of these observations to make your ITC map and Continuum of Progress more inclusive of what you are learning.

Exercise 5: The Biography of the Big Assumption: When did it get started? What is its history? Reflect on the current relevance of your Big Assumption by understanding when, where and how it originated.

Exercise 6 & 7: Testing the Big Assumption: Intentionally behave counter to how your Big Assumption would have you act, see what happens, and then reflect on what those results tell you about the certainty of your Big Assumption. Draw on the results of your tests to make your ITC map and Continuum of Progress more inclusive of what you are learning. Test your Big Assumption once, twice, three times or as many times as you need until you are confident of when, if at all, it applies.

Designing Tests of the Big Assumption

Running Tests of the Big Assumption

Interpreting Tests of the Big Assumption

**End Game: Consolidating Your Learning**

Optional: Time-Two Survey: Get input (from the same people you heard from in Survey #1) on your Column 1 Goal. Compare your self-assessment of progress with what they see. Hear about the effect of your changes on others.

Exercise 8: Hooks and Releases: Take stock of the current status of your Big Assumption, how to maintain your progress, and how to guard against future slippage.

Exercise 9: Future Progress: Once you are “Unconsciously Released” from your current Big Assumption, you may want to consider re-engaging the Immunities process, especially around any unmet goals or areas in which you currently feel stuck or discouraged. All the exercises and tools in the Overcoming-immunities process are re-usable.

# Exercise One: Honing the Immunity Map

A powerful "diagnostic" immunity map provides a snapshot picture of what your immunity to change looks like, including what the basic Big Assumptions are that give rise to your immunities. You’ve now had a chance to “sleep” on the first draft of your map. The purpose of this exercise is to review that draft and revise it, if needed, so that 1) it feels compelling to you, 2) you understand what your current immunity to change is (you see how you have a “foot on the gas” and a “foot on the brake” all at the same time), and 3) you have a testable Big Assumption.

|  |  |  |  |
| --- | --- | --- | --- |
| **1. Commitment****(Improvement Goal)** | **2. Doing/Not Doing****(Instead of #1)** | **3. Hidden Competing Commitment****(generating Col. 2 behaviors)** | **4. Big Assumption(s)** |
| CRITERIA:-- True for you-- Implicates you-- Room for improvement-- Important to you |  CRITERIA:-- Behaviors (not emotions)-- That work against col. 1-- Not Why. Or what you should do about it. |  CRITERIA:-- Follows from the fear-- Commitment to self-protection-- Show why col. 2 behaviors make good sense!-- Feels powerful | CRITERIA:-- See how it sustains immune system-- Has a “Big-Time-Bad” conclusion for you |

# Exercise Two: Column 1 Goal Survey

The intent of this customized baseline survey is to get other people’s perspective on your change goal: do they also think it would be useful for you to work on your stated goal? What do they see as your current level of success in enacting your column 1 goal? In this way, the data provides you a “reality check” (is what you see yourself doing what significant others also see?). I will send a second survey to the same respondents at the end of this process, if appropriate. The baseline data will thereby provide a means for you to track and measure your progress accurately.

Towards this end, I will be asking you to identify 6 – 8 respondents, including yourself. Please select those people who see and/or interact with you most frequently around your column 1 improvement goal. Be vigilant to not “stack the deck” by asking only those people who you think regard your performance highly in this area! Assuming you want a realistic picture, include people who you think are your toughest critics or from whom you think you have something to learn.

Once your respondents send me their written thoughts, I will compile them to send them to you for future conversation. I will try my best to alter any identifying comments in such a way that their meaning is maintained, but the respondent’s identity is masked. However, since you work closely with these respondents, *and* some of their responses will be specific to projects in which you engaged with them, please be aware that you may be able to identify them through their comments. No one but you and I will see the responses.

Because the survey questions are designed to generate data most relevant to the changes you are looking to bring about in our work together, people’s feedback will be targeted. This survey ensures that people will provide more honest-- and therefore more useful-- feedback than they might otherwise do if *you* were to ask them for direct feedback (at least early on in this process). Feel free, however, to use additional means to gather information from your co-workers about your behaviors and the impact on them.

## Preparing for the Survey Process

Please read the Sample Survey below so that you can see what a survey looks like.

Let me know your thoughts and questions about the survey and data gathering. Comment on any aspect, *especially if you have any concerns*. Before we move further, I want you to decide whether the survey would be valuable to you.

If you agree to the survey, I will ask you to respond to the following questions:

*How do you want to inform respondents of your request for their input?* You can a) tell them in person or by phone, at which time you can answer any of their questions, b) send them an e-mail (if you want, I can send you a sample note you might want to send) or c) I can contact them (by e-mail or phone). If you choose to contact them yourself, please give them my name and tell them they can expect to hear from me shortly. Let me know by \_\_\_\_\_\_\_\_\_(date) how you want to handle this. If you want me to take this step, then please send me people’s contact information at this time too.

*Who do you want to get feedback from?* Remember to select people who see and/or interact with you most frequently around your column 1 improvement goal. Include people who you think are your toughest critics or from whom you think you have something to learn.

*Send me the names and e-mail addresses of all of your respondents*. If you are contacting them, send me this information as soon as you have contacted everyone. Can we agree to you sending me that by \_\_\_\_\_\_\_\_\_(date)?

*What specific wording would you like in your survey, especially in communicating the area you have chosen to work on?* I have attached a draft of what your survey might look based on your current immunity map. However, this specific wording might not be what you want to use, so think about how best to explain to your colleagues what it is that you want to work on.

## Survey Process

You complete “Prep” steps as described above

All respondents sent survey and directions

You and I set a phone meeting time (45 minutes) for two weeks after the survey is sent out

Respondents have 1 week to complete the survey. (I will have information re: who has and hasn’t responded, and will send a reminder if needed to those who haven’t returned their survey by mid-week).

Before our phone meeting, and within the week of my receiving all responses, I send you a summary of survey results.

Once you receive your results, you prepare for our phone meeting by answering the reflection questions below.

## Sample Survey

|  |
| --- |
| *The area Al has chosen to work on is to deal* ***more directly with situations and circumstances that may involve conflict, confrontation, uncomfortable or “negative” feelings.*** *There are many ways that Al’s skill at keeping relationships smooth is a great strength, of course, but he wants to work at reducing unproductive sides of this tendency, particularly in areas where conflict may be necessary for pushing the business forward.**This is a confidential survey. You were chosen by Al to be one of his survey respondents. It is his hope you will answer as frankly as possible.* ***Obviously, Al’s own self-assessment on the following questions at the present time would be rather low.*** *Responses will not be identified by respondents. Al will receive an anonymous profile of the results of 5 – 7 surveys like this one. On his behalf, I thank you for the benefit of your thinking and about 15 minutes of your time—now, and again in about four months.**1. The area Al has chosen to work on is to deal more directly with situations and circumstances that may involve conflict, confrontation, uncomfortable or “negative” feelings. To what extent do you experience Al dealing directly with these issues WITH YOU?*1 = Not at all 10 = Very frequently*2. To what extent do you experience Al dealing directly with these issues WITH OTHERS?*1 = Not at all 10 = Very frequently*3. COMMENTS: Please take a minute to expand on this quick take. E.G., any further thoughts, explaining what you mean, giving examples, will be helpful.**4. As you think about just this aspect of Al’s functioning,* ***how important to the office would you consider his making significant improvement?***1 = Not at all 10 = Very important*5. Why do you say so? In what ways would it matter/ not matter? (We know these take a moment, but they are extremely helpful to Al and his coach. The more particular you can be, the better).**6. If this is NOT an area you think Al should be working on, what alternative suggestions do you have?* |

## Reflecting on Your Survey Data

## Your workspace:

**Consider the data *in the context of your most recently revised immunity map*.**

|  |  |
| --- | --- |
| What, if anything, does the data suggest regarding your column 1 commitment? (i.e., do the results suggest that you have targeted a powerful column 1 commitment?) |  |
| What, if anything, does the data suggest regarding your column 2 behaviors? (i.e., are there add’l column 2 behaviors to add to your map?) |  |
| What, if anything, does the data suggest regarding your Big Assumption? |  |
| Compare your responses with those of your respondents. What’s similar? Where are the differences? What’s your take on those differences? |  |
| What are your “take-aways” from thinking about this data? |  |

# Exercise Three: Continuum of Progress

This exercise is designed to help you plan for your success in meeting your Column 1 Improvement Goal. Its purpose is to have you envision what success looks like, both short-term and long-term, in terms of how you *think, feel* and *act*, while drawing on your insights into your immune system. The main focus here is on *you*, and your increasing effectiveness in meeting your goal. To be clear, the purpose of identifying these progress steps is NOT to begin immediately trying to accomplish them. The whole point of the immune system concept is that change is not a straight-forward matter as people often think. It may be useful to periodically review and revise your Continuum of Progress as you discover new thoughts and feelings through later exercises.

|  |
| --- |
| **What you will get from creating a personalized picture of emerging success:** A clear picture of success ***provides direction***. You are more likely to get where you want to go the more you know where you want to go.Being able to visualize what full success looks like--like athletes do—also ***increases the likelihood of being successful*** as you imagine effectively engaging in targeted new mindsets & behaviors. This often ***releases energy and optimism for improvement***, important allies for personal change.You can safely ***explore how revising your Big Assumption can lead to new mindset & behavior options***. In doing so, you may develop potential ways you want to test your Big Assumption.You can use your success picture to ***identify what you may need to learn*** to be successful. In this way, you plan for success.A completed Continuum of Progress ***provides a realistic image of the pace of improvement***. Lasting change depends on small, incremental steps, taken over time, with success building upon success. |

## Directions

1. Review your 4-column map to remind yourself what your immune system is (columns 1 through 3), and how your Big Assumption(s) influences your immune system. Ask your coach if you need clarification.

2. Enter your Column #1 improvement goal into the 1st column of your Continuum.

3. Then answer the question: “What would it look like if you were to be fully successful in accomplishing your Column #1 goal?” *Be as specific as you can* in naming what you would be thinking, feeling and doing. Because meeting your goal will likely involve you being *less* *captive* by your Big Assumption, you may be helped by imagining what different thoughts, feelings and behaviors you would have if you were free of it. (If nothing comes to mind, think of someone you admire who models your goal. What thoughts, feelings and actions do you imagine he or she engages in that you would like to experience for yourself? Remember, the focus is still on you.) Enter your answer in the last column, “Full Success.”

4. Then work backwards from that picture: What would constitute significant progress in moving towards full success? Consider the different thoughts, feelings and behaviors you would experience if you were on your way towards being less captive to your Big Assumption. Enter your answer in the column entitled, “Significant Progress.”

5. Next, answer the question, “What would constitute just an appreciable first step forward?” A useful first step can be as straight-forward as telling someone you trust what you are working on. Enter your answer in the First Noticeable Step Forward column.

If you want to start your Continuum now, skip the next page. If you’d like to see an example first, keep reading here:

## Example Continuum of Progress

*Big Assumption****: “If I tell someone what I really think, they’ll react negatively to me, I’ll get overwhelmed by feelings of self-doubt and worry that I’m offending him or her.”***

|  |  |  |  |
| --- | --- | --- | --- |
| Column 1 Improvement Goal | First Steps Forward | Significant Progress | Success |
| To deal directly and effectively with conflict and difficult conversations | I become aware of when I’m avoiding conflict. Are there patterns? What pushes my buttons?I later plan what I’d say if I was to deal with any of those situations directly & effectively. I get feedback on those comments from someone who wasn’t a part of the situation. Also, I ask that person what she or he might have said. I pay attention to times when I overhear others dealing well with conflict to figure out what they are doing that works. I ask them afterwards whether they doubt themselves when disagreeing.I read a few highly recommended readings on how to deal with conflict and practice the advice in my mind. | I know what some of the topics are that lead me to avoid conflict. I have thought through, as much as I can, what I really think about the topic. When the topic next comes up with someone, I don’t mince words or sugarcoat my position. I say what I think. Even if I feel nervous saying it, I feel good for having said it.I am open to what the other person says in response. I don’t react; I listen and take it slow. I figure out how to not let my feelings take me over both before & during my comments. I don’t start doubting myself. I feel okay about the person disagreeing with me. | I’m aware in the moment that I disagree, or I know I need to say something that might lead to a difficult conversation. I say what I’m really thinking, but without getting all caught up in nervous & anxious feelings I may have. I catch myself when I’m reacting too quickly to the other person. I catch myself when I feel like they are dismissing my idea and know how to stay in the conversation productively. |

### Your workspace:

**CONTINUUM OF PROGRESS**

|  |  |  |  |
| --- | --- | --- | --- |
| Column 1 Commitment | First Noticeable Step Forward | Significant Progress | Full Success |
|  |  |  |  |

# Exercise Four: Observing the Big Assumption in Action & Observing Natural Challenges to the Big Assumption

What happens, and fails to happen, as a result of holding your Big Assumption as true? The idea in the first part of this next step is to keep track of situations where you can see (or have recently seen) your Big Assumption at work—e.g., influencing how you look at things, feel about things, take action (or not take action), make choices, spend your energies, etc. These situations may be so abundant that it will make sense for you just to keep track of the several most salient instances. Or, there may only be a few such situations that occur. Feel free to confine your observations to the work sphere or make note of *wherever* you see your Big Assumption influencing you.

**For the next two weeks, do not attempt to change your behavior or your Big Assumption. Do attend to its influence in your life. Specifically: What do you notice does or does not happen as a result of holding your Big Assumption as TRUE? Write two things down: 1) what happened (including inside of you, what you were thinking and feeling), and 2) what costs did you incur?**

### Your workspace:

Describe situation where Big Assumption got in your way

Describe costs to you (“what did it block, prevent or impair?”)

|  |  |
| --- | --- |
| Situation #1: | Situation #1: |
| Situation #2:  | Situation #2:  |
| Situation #3:  | Situation #3:  |
| Situation #4:  | Situation #4:  |

Once you have a few examples of seeing your Big Assumption in action (three or more), you can start to look for patterns and themes. Take a look across all your examples and ask yourself the following kinds of questions:

|  |  |
| --- | --- |
| What stands out to you? What do you notice most of all? |  |
| What does your BA do to you? What thoughts, feelings, perspectives, actions, & choices do you experience as a consequence of your BA? |  |
| Do you see patterns i.e., are there particular types of people, content areas, circumstances (inside yourself or in the environment) that activate your Big Assumption?  |  |
| Any “ah ha”?  |  |
| Do you notice any additional Big Assumptions you are making? If so, add these to your 4-col map. |  |
| What are your key take-aways? Any implications for your Continuum of Progress? If so, add these. |  |

In addition to looking for examples of your Big Assumption in action, we invite you to be on the lookout for experiences that lead you to question the truthfulness or widespread applicability of your Big Assumption. Because of the “certainty” quality of our Big Assumptions (our difficulty in considering how things could be any \*other\* than this), our Big Assumptions actually inform what we see and how we see the world. They lead us to attend systematically to certain data and to systematically avoid or ignore other data.

**Search for data and experiences—whether in your professional life or personal life—that would counter or cast doubt on the absolute quality of your Big Assumptions. Take notes about specific situations, interactions, feelings, etc.** *Again, do not intentionally change anything you do or think, relative to your Big Assumptions, only take account of any spontaneously occurring experiences that might cast doubt on their absolute quality.*

Describe situation that **casts doubt** on Describe your reactions (thoughts and your Big Assumption feelings)

|  |  |
| --- | --- |
| Situation #1: | Situation #1: |
| Situation #2:  | Situation #2:  |
| Situation #3:  | Situation #3:  |
| Situation #4:  | Situation #4:  |

Once you have at least three observations of challenges and counters to your Big Assumption, it’s time to step back to see what you can learn from these about your Big Assumption and your mindset, more generally. Take a look across all your examples and ask yourself the following kinds of questions:

|  |  |
| --- | --- |
| What stands out to you? What do you notice most of all? |  |
| What thoughts, feelings, perspectives, actions, and choices did you experience in these instances? |  |
| Do you see any patterns? Is the same doubt about your Big Assumption raised across the different instances? Is there anything in common across the examples that might account for the counter-data? (e.g., particular types of people, content areas, circumstances, inside yourself or in the environment). |  |
| Did you act differently than your Big Assumption would have you act? If so, what did you do? What are your hunches about why you acted differently? Was it because of something “out there,” or something you said to yourself, or some combination of the two, or anything else? |  |
| What does the counter-data suggest to you about your Big Assumption? |  |
| What are your key take-aways? Are there any additions or revisions you’d want to make to your Continuum of Progress based on these observations? |  |

# Exercise Five: Writing the Biography of the Big Assumption

Our Big Assumptions, typically, have been living with us for awhile (sometimes, for a very long while), and have become part of our skin without our realizing it. They may have been born out of a single, significant event or over a series of experiences, typically at a time when we were young and in a different relationship to power and authority than we are as adults. The idea behind this exercise is that we may discover a different relationship to our Big Assumption if, now that we are adults, we revisit their earliest and most tender state (before they systematically re-confirmed their truth).

Read the “Biography” question below and sleep on it. It might be helpful to know that people tend to have one of two experiences with this exercise: blah or wow! Some people find it very difficult to uncover a history of their Big Assumption, or if they do, they tend not to find anything interesting about it, whereas other people find this is a very clear “ah ha” moment. They feel excited by discovering a key source of what has allowed their Big Assumption to thrive all these years. So read the question now and unless something immediately comes to mind, come back to this exercise tomorrow. If this is a “blah” for you, skip it.

**Explore the history of your Big Assumption: When was it born? Are there specific situations, feelings, important events or “moments” you can recall? How long has it been around? What were some of its critical turning points?** Perhaps there is one “story,” event, “snapshot” or episode that captures something from your past that may have gotten your Big Assumption started or served to emphasize its importance? ***Again, do not intentionally change anything you do or think relative to your Big Assumption*.**

### Your workspace:

### Reflections on the Biography of the Big Assumption

### Your workspace:

If you wrote a biography, here are a few questions you might find useful:

|  |  |
| --- | --- |
| In what ways does the biography (or biographic moment) explain your Big Assumption? |  |
| Does your biography (or biographic moment) illuminate any additional Big Assumptions you might be making? Do you notice any definitive, i.e., this- always-happens, quality?  |  |
| To what extent do you believe and feel the situation or events from your biography (or biographic moment) apply to your current life? If you think they do, how so? |  |

# Exercise Six: Designing a Test of Your Big Assumption

Testing Big Assumptions is at the heart of overturning an immunity to change. *The purpose of a test is to see what happens when you intentionally alter your usual behavior in order to learn about the accuracy of your Big Assumption*. (In other words, the purpose of a test is to “get information” not immediately to improve or “get better.”) Everything you have been doing up until now is to better prepare you to design, run and make sense of the results of testing your Big Assumption.

The goal of this exercise is for you to design a test of one of your Big Assumptions. It is preparation for actually running your first “formal” test. We will have a phone meeting to look together at the extent to which your test meets the criteria below.

A good test meets **S-M-A-R-T** criteria.

### S-M-A-R-T Criteria:

1) **S-M**: it is important that your experiment be both **safe** and **modest**. You might ask yourself, “what can I risk doing, or resist doing, on a small scale that might seem inadvisable if I held my Big Assumption as true, in order to learn what the results would actually be?”

2) **A:** a good test will be **actionable** in the near-term. This means that the test is relatively easy to carry out (ideally, it doesn’t require you to go out of your way at all, but rather is an opportunity to do something different in your normal day), and that you are able to carry it out within the next week or so.

3) **R-T**: finally, a good test **researches** the question, “how accurate is my Big Assumption?” and, like any good research, it requires collecting data (including data that would qualify your assumption or call it into doubt). In addition to how people react to you, *your feelings* can be a very rich data source. The test, in fact, **tests** your Big Assumption. A “test” should not be some clever way to prove that your Big Assumption is true! Your test should be designed so that it can generate disconfirming data, if it exists.

Sometimes, the easiest way to design a test is to start with the end in mind: What data would lead you to doubt your Big Assumption? What data would lead you to doubt your Big Assumption? (If you can’t imagine what data could challenge or cast doubt on your assumption, then you don’t have a testable assumption.) Work backwards from there to figure out what action you could take that could generate that data.

Or you could design a test by thinking first about your behavior: what behavior you could change (start or stop doing) that would get you useful information about your Big Assumption? Here are some options from which to choose:

* + Alter a behavior from your Column 2
	+ Perform an action that runs counter to your Column 3 Commitment
	+ Start directly from your Big Assumption (Column 4): “What experiment would give me information (as to whether, e.g., the if-then sequence built into the assumption is really so certain)?”
	+ Go to your Continuum of Progress and enact a version of a next recognizable step
	+ Go to your Observations of Counters to your Big Assumption and try an intention version of one of these

### First workspace:

|  |  |  |  |
| --- | --- | --- | --- |
| My Big Assumption Says: | So I will (Change my Behavior This Way)… | And collect the following data … | In Order to Find Out Whether … |
|  |  |  |  |

Is there anyone to whom you’d like to give a “heads-up” or ask to serve as an observer who can give you feedback after the fact?

### Review your test on these criteria:

|  |  |  |
| --- | --- | --- |
|  | **Yes** | **Not Sure** |
| Is it safe? (If the worst case were to happen, you could live with the results). |  |  |
| Is the data relevant to your Big Assumption? (see question 2 above) |  |  |
| Does it have face-validity? (The test actually tests your Big Assumption) |  |  |
| Are the data sources valid? (No one is either out to get you or wants to protect or save you). |  |  |
| Might it “re-true” your Big Assumption? (Is it designed so that it surely will lead to bad consequences, just as your BA tells you? Are you setting yourself up to fail? Is there any data you could collect that could disconfirm your BA?) |  |  |
| Is it actionable in the near-term? (e.g., the people or situation you need in order to enact the test are available, you are reasonably certain you know how to do what you plan, and you can run the test within the next week or so).  |  |  |

If you made any changes to your original test design based on our phone meeting, capture them here.

### Workspace for test changes:

|  |  |  |  |
| --- | --- | --- | --- |
| My Big Assumption Says: | So I will (Change my Behavior This Way)… | And collect the following data … | In Order to Find Out Whether … |
|  |  |  |  |

# Exercise Seven: Running and Interpreting the Test

Designing an effective test of your Big Assumption is one step. Running it is a next step. Now is the time to look at your “data” for the sole purpose of understanding what it suggests about your Big Assumption. **Remember, the purpose of running a good test is not to see whether you improved, i.e., whether your behavior change “worked” (although this is not unimportant!), but rather to use the test results to inform your Big Assumption.** You will know you are on track with this exercise if you can see what aspect of your Big Assumption, if any, is confirmed by the data, and what aspect, if any, is disconfirmed.

Here are a few tips to keep in mind when you interpret your data:

-- The point of a test is not to outright reject a Big Assumption, but rather to help sharpen its contours so you have a realistic, data-based version of when, where and with whom your Big Assumption is relevant. (Even relatively modest changes to a Big Assumption can overturn an immunity to change.)

-- No one experiment is likely to be conclusive about a Big Assumption.

-- When our Big Assumptions have a powerful hold on us, they direct us to predictable interpretations—ones that keep the Big Assumption alive and well! An antidote to this tendency is to push yourself to generate at least one additional interpretation of the data. (If nothing comes to mind, then try this: Imagine you are someone else, a real person, who happened to be in that exact situation, and the same things happened. How would this person make sense of what happened? If that doesn’t get you anywhere, then find a person you trust to offer his or her interpretation.)

### Your workspace:

|  |  |  |  |
| --- | --- | --- | --- |
| My Big Assumption Says: | So in Order to Test it I Changed my Behavior This Way … | This is What I Observed Happening … | And This is What it Tells me about my Big Assumption |
|  |  |  |  |

Remember that no one test is likely to be conclusive about a Big Assumption. Often, the second and third tests are versions of the first one. What differs is the person, circumstance or level of risk. It is the cumulative weight of several tests that, in most cases, begins to overturn the person’s Immunity to Change --the whole purpose of these exercises. Once the Big Assumption no longer has its force, the self-protective Column 3 Commitment is no longer necessary and we stop needing to generate the obstructive Column 2 behaviors.

What are your thoughts about a next test of your Big Assumption? Pick up on what you’ve learned about your Big Assumption. What next test could you design to learn more?

This may also be a good time to revisit your Continuum of Progress to check whether it reflects any new thoughts, feelings and behaviors you have access to now that you have begun to formally test your Big Assumption.

### Your workspace to design a next test:

|  |  |  |  |
| --- | --- | --- | --- |
| My Big Assumption Says: | So I will (Change my Behavior This Way)… | And collect the following data … | In Order to Find Out Whether … |
|  |  |  |  |

Is there anyone to whom you’d like to give a “heads-up” or ask to serve as an observer who can give you feedback after the fact?

### Review your test on these criteria:

|  |  |  |
| --- | --- | --- |
|  | **Yes** | **Not Sure** |
| Is it safe? (If the worst case were to happen, you could live with the results). |  |  |
| Is the data relevant to your Big Assumption? (see question 2 above) |  |  |
| Does it have face-validity? (The test actually tests your Big Assumption) |  |  |
| Are the data sources valid? (No one is either out to get you or wants to protect or save you). |  |  |
| Might it “re-true” your Big Assumption? (Is it designed so that it surely will lead to bad consequences, just as your BA tells you? Are you setting yourself up to fail? Is there any data you could collect that could disconfirm your BA?) |  |  |
| Is it actionable in the near-term? (e.g., the people or situation you need in order to enact the test are available, you are reasonably certain you know how to do what you plan, and you can run the test within the next week or so).  |  |  |

A quick reminder of a few tips to keep in mind when you interpret your data:

-- Can you see contours of your Big Assumption, i.e., “when, where and with whom” it is and is not relevant?

-- No one experiment is likely to be conclusive about a Big Assumption.

-- Can you generate at least one additional interpretation of the data?

### Your workspace to report on test #2, what happened and how you make sense of that:

|  |  |  |  |
| --- | --- | --- | --- |
| My Big Assumption Says: | So in Order to Test it I Changed my Behavior This Way … | This is What I Observed Happening … | And This is What it Tells me about my Big Assumption |
|  |  |  |  |

Feel free to add more pages to your workbook for planning and running additional tests. While you are exploring your Big Assumption, you may discover that it would be valuable to test another assumption. That often happens. If so, revisit exercise 6 & 7 with the new assumption (you might want to do the self-observations exercises first).

# Exercise Eight: Taking Stock

You hopefully have seen personal progress towards your improvement goal by this point in the overcoming-immunities process. You may also be wondering, just about now, whether you are going to be able to sustain your good progress. We all have had experiences of slipping back into old habits and patterns, so we can legitimately ask, “Why should this be any different?”

One way to help yourself not slip back is to consolidate your current progress on overcoming your immunity. This exercise is designed to help you do just that. By assessing where you on in the following developmental sequence, you will be able to make informed choices about what next steps will deepen or anchor your new learning.

**Development Sequence for Overcoming Immunities to Change**

UNCONSCIOUSLY “IMMUNE”

CONSCIOUSLY “IMMUNE”

CONSCIOUSLY “RELEASED”

UNCONSCIOUSLY “RELEASED”

**Reflecting on where you are in the process of overcoming your immunity to change:**

Take a moment now to think about exactly where *you* are in overcoming *your* immunity. To do that, use the following basic descriptions of what it means to be “Consciously Released” and “Unconsciously Released.”

“Consciously Released”: Testing your Big Assumption(s) and discovering the conditions under which it is and is not valid is a crucial part of this development phase. This may include discovering that the Big Assumption is not warranted in any situation. Often people learn new behaviors and new "self-talk" scripts as a part of this testing process. When you can act on your newly discovered knowledge to interrupt the Big Assumption (and the old behavior and self talk patterns associated with it) in those situations where it is not valid, you are demonstrating the new capacity to be "Consciously Released" from your Big Assumption. This takes mindful practice. The journey is not a bump-free or necessarily straight one. It is normal to fall back into old patterns associated with the Big Assumption. Still, knowing that you're falling back, and knowing how you can get yourself unstuck are all signs of development. You should also see that you have made progress towards meeting your Column 1 goal.

"Unconsciously Released": When you no longer need to stop, think and plan in order to interrupt your Big Assumption, you have developed the capacity to be "Unconsciously Released" from it. At this point, you automatically act and think in ways that run counter to your previously held Big Assumption in those situations where it is not valid. New beliefs and understandings, informed and developed mindfully throughout the process, have taken the place of the Big Assumption. You have likely made significant progress, if not full success, towards meeting your Column 1 goal.

Which of these two descriptions speaks to you?

If your self-assessment is that you are "Unconsciously Released,” then this exercise will be a useful summary of your work to date. If “Consciously Released” better describes your current relationship to your Big Assumption, then you may want to continue with further tests of your Big Assumption (a good choice especially if you are aware that your Big Assumption grabs hold of you frequently) and use the results of this exercise to focus those tests. The testing process is iterative and there is no set number of tests that, if done, will overturn an immune system. Keep with testing until you no longer feel hooked by your Big Assumption.

**Review this development sequence and comment on where you see yourself in the sequence at this time. You may find the following questions useful as you take stock of where you are:**

### Your workspace:

|  |  |
| --- | --- |
| Where do you see yourself in the sequence at this time?  |  |
| Have you reached any conclusions, or have any hunches about conditions under which your Big Assumption is *valid*? Think about particular situations – who, what, where and when. |  |
| Have you reached any conclusions, or have any hunches about conditions under which your Big Assumption is *invalid*? Think about particular situations – who, what, where and when. |  |
| Do you find your Big Assumption asserting itself in situations you know it ought not? If so, do you have any generalizations about the conditions under which you are likely (more or less) to find yourself being sucked into the old patterns associated with the Big Assumption? What still sometimes *hooks* you? |  |
| Are there key “releases” (i.e., self-talk that unhooks you) you have developed and can use to help yourself easily and readily when you are facing your Big Assumption in real-time? |  |
| To what extent / how often can you use these “releases” to help you from being pulled into old patterns? |  |
| Have you developed new behaviors or ways of talking to yourself in situations that used to activate your Big Assumption? |  |
| Think about situations in which you think your Big Assumption is no longer accurate. What new beliefs or understandings do you hold about “how things work” or what will happen in these situations? |  |

# Exercise Nine: Future Progress

As described in the development sequence, becoming unconsciously “released” from the Big Assumption is the aspiration of overcoming one’s immunity. When you no longer need to stop, think and plan in order to interrupt your Big Assumption, you have developed the capacity to be “Unconsciously Released” from it. At this point, you automatically act and think in ways that run counter to your previously held Big Assumption in those situations where it is not valid. New beliefs and understandings, informed and developed mindfully throughout the process, have taken the place of the Big Assumption.

This may also be a time when you consider re-engaging the Immunities process, especially around any unmet goals or areas in which you currently feel stuck or discouraged. All the tools in this process are re-usable. These tools can be a resource to a life-long approach to transformative change by helping you see how you can achieve *other* commitments through identifying, testing and altering other Big Assumptions. Yes, the implication here is that if you look, you will find others areas in which you are Unconsciously Immune. Developing capacity to identify such areas is a key to enabling ourselves to better accomplish our aspirations.

The very first step is to develop a new immunity map. Once you’ve done this, return to the earlier portions of your journal to remind yourself of the unfolding exercises and how to do them.

### New immunity map:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Generating ideas | **Col 1.****Commitment** | **Col. 2****Doing/ Not Doing** | **Col. 3** **Hidden Competing Commitment** | **Col. 4****Big Assumption** |
|  |  |  |  |  |