

## Values Clarification Exercise

Values are who we are. Not who we would like to be, not who we think we should be, but who we are in our lives, right now. Another way to put it is that values represent our unique and individual essence, our ultimate and most fulfilling form of expressing and relating. Our values serve as a compass pointing out what it means to be true to oneself. When we honor our values on a regular and consistent basis, life is good and fulfilling.

As coaches, we know how beneficial it can be for clients when they are clear about their own values. Important life decisions are easier to make and outcomes are more fulfilling when the decisions are viewed through a matrix of well-understood personal values. However, the process of clarifying values is often difficult for clients. It frequently makes people intellectualize and fantasize, whereas you want them to look into their lives and uncover the values that are already there, in their day-to-day actions and interactions. That's one of the reasons selecting values from a list seldom works: the list becomes an opportunity to vote on the most desirable or socially acceptable values, rather than serving as a mechanism to identify who we are. Selecting values from a list reinforces the intellectual urge to figure it out and get the words right. Clients' values are observable; they live in the world. Thus, they won't benefit from picking their values from a list. The coach's job is to assist clients in viewing their lives in such a way that values are revealed.

Sometimes clients can't seem to get a perspective on their values. Coaching works well in such cases because the coach can ask questions and provide scenarios that take clients into their lives rather than into their heads. Values clarification coaching allows clients to examine and articulate their values

in a safe yet courageous environment. The exact wording will matter to the client in the long run, but what is most important in the short run is that the approximate label for the value resonate with the client. As a practical matter for coaches, values clarification is enormously helpful in learning to know clients, and in helping clients know themselves. Coaches and clients use values to help facilitate fulfilling choices, to strategize appropriate actions, and to recognize situations in which values are an issue.

Many clients nevertheless struggle with finding the right words. They are constrained because they feel they have to find the perfect word and the value has much more emotional meaning than the definition of a single word allows. In fact, each individual has his or her own unique meaning for each value. We may have different meanings even though we use the same word. Earlier, we mentioned techniques that can minimize vocabulary anxiety. The first tip is to use a pencil with an eraser. Clients often experience a sense of reluctance when values have to be written in ink. The coach can emphasize the advantages of using a pencil so the client realizes that it is not important to get it right the first time. The second tip when doing values clarification is to use several words together to form a string describing the value. Separating the words with slash marks makes the string easier to read. For example:

- Integrity/Honesty/Walk-the-talk
- Integrity/Whole/Congruent
- Leadership/Empower/Collaborative
- Leadership/Decisive/Powerful

When creating the values string, ask the client to place the most significant term at the beginning,

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such as “Integrity” and “Leadership” in the examples above. Point out that it may take several months to come up with a fairly complete list of values. Since values show up over time in our lives, it is unlikely that we will be able to capture them accurately and completely in one sitting. Values that are fully defined and elaborated on become a powerful tool in pointing clients toward fulfilling choices as they approach a major crossroads or get off track.

The coach facilitates the process of identifying values by proposing various scenarios to the client. The following scenarios will give you a place to start. Experiment with these and continue to explore other methods for allowing clients to see their values.

### **A Peak Moment in Time**

Ask the client to identify special, peak moments when life was especially rewarding or poignant. It’s important that the time frame be quite limited—a “moment”—or there will be too much in the experience to allow the client to pinpoint specific values. When the client has a specific moment in mind, start probing: “What was happening?” “Who was present and what was going on?” “What were the values that were being honored in that moment?” Acknowledge what you are hearing and keep probing, periodically testing words to see what values resonate for this client. “That sounds important.” “Is there a value of accomplishment or achievement in that experience?” or “You light up when you describe that day. It sounds like you were honoring a value around nature and a value of connection. Does that sound right?” There will be a stronger response when the words ring true. Ask the client to expand on the first word. “What does ‘accomplishment’ mean to you?” “What words elaborate on your value of connection?” Keep looking at peak moments, seeking experiences the client found particularly rich and fulfilling.

### **Suppressed Values**

Another way to isolate values is to go to the opposite extreme, looking at times when a client was angry, frustrated, or upset. This will often lead to identification of a value that was being suppressed. First, have the client name the feelings and circumstances around the upset; then flip it over and look for the opposite of those feelings. For example, the client might say, “I felt trapped, backed into a corner. I had no choices.” The coach might then say, “Trapped, cornered, without choice. If we flip that over, it sounds like there might be a value around freedom or options or choice. Does that sound right?” For the coach, it’s not so important that the vocabulary be right—it’s important that the words feel right to the client. To further illustrate, the coach might say, “So you felt frustrated when they kept spinning their wheels, doing the same thing over and over again? Is the other side of that a value for creativity or innovation?”

Many of us have created our lives in such a way that we automatically and easily honor many of our values without even being aware that we are doing so. Therefore we may not recognize them as values until something gets in the way. The key here is to point out to the client that every upset or moment of distress is likely to signal that a value is being suppressed.

### **Must-Haves**

Another way for clients to identify their values is to look at what they must have in their lives. Try it yourself. Beyond the physical requirements of food, shelter, and community, what must you have in your life in order to be fulfilled? Must you have a form of creative self-expression? Must you have adventure and excitement in your life? Must you have partnership and collaboration? Must you be moving toward a sense of accomplishment or success or be surrounded with natural beauty?

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An underlying question for the process is *What are the values you absolutely must honor—or part of you dies?*

### **Obsessive Expression**

We are all capable of obsessive behavior—insisting on honoring a value, inflating it into a demand rather than a form of self-expression. You’ve probably had an experience like this in your own life, such as when your roommate’s value of orderliness became an obsessive demand for perfection. Our friends and families often do us a service by pointing out the obsessive expression of our values: “You are so controlling!” “All you think about is your students.” “You want all the attention.” These statements might point toward a value of personal power/ leadership, of learning/ growth, and of recognition/ acknowledgment. Have your clients examine those times when they take certain values to the extreme. “What is it that people say about you? What do you say about yourself?” “What is it that people tease you about or that drives them crazy?” There are important values here that have mutated for some reason. Look for the value, and don’t focus on the mutation.

### **The Values-Based Decision Matrix**

One of the most potent tools for making fulfilling life choices is the Values-Based Decision Matrix. This matrix is launched during the initial values clarification process. (Please note that the listing of values may take several months to complete.) After you and the client have brainstormed a list of values, ask the client to rank the top ten values in priority order. Then ask the client to score his or her sense of satisfaction—the degree to which he or she is honoring each value—using a scale of 0 to 10. Most clients find this exercise very revealing, and they are often shocked at what they learn about themselves.

Generally, the coach pays particular attention when a client indicates that a score is below 7. This is a likely place for coaching, since low scores mean the client might be putting up with an intolerable situation. The coach may want to revisit this process from time to time to keep the client grounded in his or her sense of self.

Over the years, we have noted that when things are going particularly well in a client’s life, the scores typically are high. When the client is struggling or is at a low point, the values matrix can help determine where corrective action is needed. When a client is facing a major decision, such as whether to make a job change or start a new business, or even to have a child, the Values-Based Decision Matrix can be particularly revealing. Ask the client to score his or her values today. Next, ask the client to project out two months, a year, or sometime in the future: “Imagine that you did make the change. Anticipate and write down what your scores would be if you did. Next, imagine that you did not make the change and record those scores.” This exercise will provide the client with useful insight about making a fulfilling choice.

The following sample Values-Based Decision Matrix represents the responses of a client determining whether or not to take on the leadership role in her company. As you can see, Leadership is not among the top ten values. Review the numbers as if these were your values and your decision. Note how provocative and revealing such an examination can be. What are not on this list of values are tangible measures, such as money and status—factors that are usually the basis for decision making yet rarely lead to fulfilling choices.

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<b>Sample Values-Based Decision Matrix</b>						
	<b>Date: 7/06 Score Value</b>	<b>Date: 7/07 Score Value</b>	<b>Date: 12/07 Score Value</b>	<b>Date: Score Value</b>	<b>Date: Score Value</b>	<b>Date: Score Value</b>
<b>Prioritize and List Values</b>						
1. Learning/Growth	9	9	6			
2. Self-Expression	7	9	8			
3. Freedom/Independence	5	7	8			
4. Innovate/Create	6	8	7			
5. Partnership/Collaborate	8	9	8			
6. Organized/Order	7	8	7			
7. Integrity/Honesty	9	9	7			
8. Fun/Humor/Play	7	6	8			
9. Connection/Intimacy	8	6	8			
10. Adventure/Risk Taking	5	8	7			

### Keep Looking

Because values are such an important part of the way clients order their lives and make choices, it is essential to continue to look at this area. Values could conceivably be examined in every coaching call—either to help make a choice or to clarify and reinforce a course of action: What is the value that would be honored if you did that? When your clients honor their values, three things happen: one, they add additional fuel to the motivation fire and help build steam for action; two, they undermine the work of the Saboteur because action based on values is more powerful than the Saboteur’s reasons for not taking action or for taking some other course of action; and three, they have fulfilling lives.

### Additional Forms

Three additional forms that can be used when working with values are included in this section. They are the Values Worksheet, to assist the client in identifying values; the Standards and Obstacles Worksheet, to help with establishing standards and obstacles for honoring values; and the Values Action Log, to assist in creating values-based action plans.

The Sample Values List is to be held by the coach and not provided to the client. When we are on the spot, we often forget values; using the list enables the coach to prompt clients about their values—especially when the coach senses that a client may be negating or overlooking some obvious value, such as spirituality or humor.

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### Standards and Obstacles Worksheet

<b>Value</b>	<b>Honoring Score</b>	<b>Standard (How is value honored?)</b>	<b>Obstacle to Honoring Value</b>	<b>Strength of Obstacle Score</b>
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				

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### Values Action Log

Value	Action to Be Taken to Increase Score	By When?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

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### Sample Values List

The following list contains words or phrases that illustrate values. Remember as you work with this exercise that you may combine two or three values as long as critical distinctions are not lost. For example, whereas the combination "Honesty/Integrity/Truthfulness" maintains a single distinction, "Honesty/Integrity/Freedom" combines concepts and thereby loses clarity.'

Humor	Participation	Directness	Performance
Partnership	Collaboration	Productivity	Community
Service	Personal Power	Contribution	Freedom to Choose
Excellence	Connectedness	Free Spirit	Acknowledgment
Focus	Comradeship	Romance	Lightness
Recognition	Spirituality	Harmony	Empowerment
Accomplishment	Full Self-Expression	Orderliness	Integrity
Forward the Action	Creativity	Honesty	Independence
Success	Nurturing	Accuracy	Joy
Adventure	Beauty	Lack of Pretense	Authenticity
Zest	Risk Taking	Tradition	Peace
To Be Known	Elegance	Growth	Vitality
Aesthetics	Trust		