

Exploration

Meeting Preparation and Notes

Homework/action points prior to the session:

- While not necessary, consider distributing a packet of all the inspirational Life Planning exercises prior to the first session, so your client will have a better understanding of the nature of the conversation. These exercises include the *Three Questions*, *Heart's Core Grid*, *Goals for Your Life*, and *Ideal Day/Week/Year*. Although you might ask the client to prepare the materials, you shouldn't expect the client to have completed any or all of the exercises prior to the Exploration session.
- The financial data organizer (if you will be doing a financial plan)

Goals for the session:

- Make a connection
- Following the feelings

Agenda items for this session:

- *"Anything urgent?"* or *"Anything pressing?"*
- *"Why are you here?"* *"What brings you here today?"* If the client is stumped by the question, a clarifying question might be used: *"If we were to meet over several meetings or over several years, what would you like to accomplish?"*
- Possible goals and what really gives the client energy
- Reserve 30 minutes at the end of the session for the financial planning questionnaire, bells & whistles, and urgent matters
- Questions and next steps

Tips:

- Come rested and prepared to the session.
- *"Anything else?"* (and variations)
- No deepening questions
- Respond as little as possible to the content of the answer but respond to the emotion you perceive
- Watch for changes in tone, body language, and facial expression
- Always confirm that you will involve every part mentioned by the client in your planning
- Be positive and enthusiastic for your client
- Dare to believe in your client's dream

Reflection:

- What touched the client the most? (three things)
- What is the client most concerned about? (three things)
- If the question “*Anything else?*” has been fully answered, look back at the emotional highs and lows of your client. (This shows how comfortable you were with the range of their experience.)
- What is the client experiencing that falls into the stages of *Innocence* and *Pain*?
- Where is the client currently having problems with *Vigor*? What are the possible solutions?
 - Addictions (including money, food, and alcohol)
 - Dependencies (including parents, family members, or spouse/significant other)
- Where did the client express resentment, blame, and complaints?

Homework/action plans for the client:

- Introduce the *Three Questions*, *Ideal Day/Week/Year*, and the *Heart’s Core Grid* and give them as inspirational exercises to be completed for the next meeting.
- Ask them to deepen/flesh out items from the Exploration meeting.
- Make it clear that for now they do not have to worry about how the dream should come about. This stage is all about energy!

TRUST THE PROCESS

Vision

Lighting the Torch

Start the conversation with appreciation, and reflecting on the last meeting, and asking “Has anything changed?” Then let your client know you want to talk with them about their answers to the *Three Questions* and the *Heart’s Core Grid*. (“How was this process for you?”)

For a brief meeting, this is the best approach:

- Ask permission to focus primarily on the Third Question.
- Express your appreciation for the quality of the responses.
- Read each response to the Third Question with an appreciative gesture or guttural.
- Pause.
- If the client doesn't respond, ask them to share more. You want to get the client’s enthusiasm piqued as you’re gathering kindling for “the Torch” here.
- After discussing their answers to the *Three Questions* (and possibly top elements of the *Heart’s Core Grid*), then “Light the Torch” by painting a picture using the following formula:
 - **If, as a consequence of our work together, I/we were to deliver to you a moment (name some point in the near future)**
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 - **How would that be for you? [Or] How would that feel?**
 - **(Long pause, empathy, pause)**
 - **Anything missing?**
- Promise the torch now or in short order, not more than three years.
- Name the time frame.
- Look back on the responses to the *Three Questions* as much as necessary.
- Support the commitment to make it all happen.
- Homework: Set the obstacles aside and live into the dream. Ask your client to complete the *Ideal Day/Week/Year* exercise as inspiration and in preparation for the next conversation if the exercise wasn’t already completed and used as part of the Torch.

Make sure you include each element of the Third Question in the Torch.

How did you sort through what needed to be included in the torch? (e.g., the relationship between Questions 2 and 3 and the *Heart’s Core Grid*)

If, because Question 3 has many elements, you are confused about what will give the most energy in the torch, you could ask the client: “Of all the things we've discussed, what are the three most essential elements for you to have a fulfilled life?”

Make sure that you deliver a particular focus on these elements in the torch.

Find the deeper meaning by feeling what it means to the client. Always ask yourself, “Is there something more profound here that I might be missing?” Be open to spirituality, creativity, and real listening without taking on the role of psychotherapist. (Continued on next page)

After lighting the Torch and using a nice long pause, ask the question: *“Anything missing?”* or *“Is there anything you want to adjust or add?”*

After offering the Torch, it’s time to fuel it and get a better understanding of the elements: *“Paint the picture for me...”* or *“What would that look like for you?”* helps to flesh out the details and gives them the opportunity to live into their dream.

Use pauses liberally throughout this process.

Consider the following:

- Did you use guttural responses? Did you pause at emotional moments, and did you show empathy?
- Did you ask challenging or skeptical questions? (This usually creates a problem.) Even encouraging questions that are actually suggestions i.e. *“have you ever thought of”* can sometimes cause a client to shut down. It is important that the client always determines the direction on their own.
- *“Tell me more about...”* helps you identify lesser/false kindling. It's a way to find out what's really important and what's not. It allows the client to make their meaning clear and determine how profound the answer is. Much better even than asking, “Tell me more,” simply mention the item verbally, with an inquisitive look or gesture.
- Did you look for ways to convey enthusiasm and encouragement rather than asking questions?
- Did you make the torch personal with many vivid details i.e. family member’s names? Don't make it too general.
- Did you use the Torch formula exactly? *“If, as a consequence of our work together, I/we were to deliver to you (a moment) _____ . How would that be for you?”* or *“How would that feel?”* Follow with a long pause.
- Did you light the torch? How do you know? Did your client flush, get excited or emotional, tear-up, or start talking enthusiastically?
- Double the stakes. If the Torch feels soggy, ask your client if there is anything else that they want to add to the vision for their future. If it is substantial, offer the entire Torch again including what was missing, and then double the stakes (decrease the timeframe).
- Where necessary, further sharpen the vision (after the Torch is lit): *“What would your ideal day in this future look like? Your ideal week? Your ideal year?”* This builds the flame and provides maximum energy!
- Tell your client to forget about the “how”.
- Challenge your client to make the vision happen soon.
- If your client has not found the energy to do the inspiration exercises in advance, do not think that it is because they are not motivated. They might just have a different way of reflecting and reporting. Acknowledge and compliment their way of processing. Trust the process and continue to do the exercises as much as possible during the meeting.
- End Vision in such a way that there is a connection and enthusiasm about the torch. Encourage them to “paint the picture” and live into their dream in the weeks before the next meeting. Don’t dwell on obstacles. Instead live into the dream. You could also give an inspirational assignment that furthers the vision, e.g. *Ideal Day/Week/Year*.

Meeting Preparation and Notes

Goals for the session:

- Deepening the relationship
- Lighting the Torch

Preparation for the session:

- Review the *Three Questions*, the *Ideal Day/Week/Year*, and *Heart's Core Grid* (look for overlap and missing items between Question 3 and the Heart's Core column)

Agenda items for this session:

- “*Anything pressing?*” “*Anything changed?*”
- Review answers to the inspirational exercises and ask deepening questions
- Light the Torch!
- If you haven't already used them, introduce or deepen *Ideal Day/Week/Year* exercise to elaborate on goals and build a blazing Torch
- Questions and next steps

Tips:

- Come rested and prepared to the session.
- Use “*Anything else?*” (or variations)
- If the client is skeptical or raises obstacles, respond confidently that you will address these obstacles later

Reflection:

- Did you learn anything new about the client?
- How did you feel during this session? Did the client's thoughts and feelings affect you? If so, how?

Homework for the client / Action plans:

- Filling in the forms: *Ideal Day/Week/Year*
- Encourage the client to dream big and to feel confident that all possible challenges will be dealt with in the best possible way. Dream about what they would ideally want.

TRUST THE PROCESS

Obstacles

Dealing with Obstacles

- Articulate a warm and generous personal appreciation and sincerely welcome the client.
- Ask the client: *"Has anything changed?"* or *"Anything new?"*
- Re-Light the Torch as soon as possible. The energy is needed to work with obstacles.
- Paint the picture.
- Go into more detail about the vision, so that both the vision and the possible obstacles become clearer. Make sure you do not bring up obstacles yourself.
- After Re-Lighting the Torch, ask *"What could possibly get in the way?"* to learn what obstacles they see and follow with *"Anything else?"*
- Important: Get the client's complete list of potential obstacles before offering any that you see.
- If you choose to raise possible obstacles, realize that this will immediately reduce the client's energy. To deal with obvious obstacles that the client does not name, present the obstacle as a possibility and ask: *"Could this be a potential roadblock for you?"*
- If you are concerned about possible obstacles, present them in a friendly way where you give the client enough space to respond. Still leave the solution to the client with questions such as: *"How would you solve this?"* or *"What solution do you see for this?"*
- For each obstacle and to gain maximum energy, the client will likely need to answer the following questions:
 - Knowing how important is to you,
 - *WHAT* can you do about this?
 - *HOW* could you do that?
 - *WHEN* are you going to do that? (be specific)
 - *WHO* could help you with that? (preferably people from the client's own environment)
 - 'What' is about the specific action to be taken
 - 'How' is about the method or strategy to be used
 - 'When' makes the action time specific
 - 'Who' guarantees the action in their own social network, which increases the chance of implementation
- By agreeing to realistic action steps together with your client, one by one, you will fuel the torch and further ignite the torch.
- Make sure that actions are small enough to accomplish within the next two weeks or the reasonable near future.
- Avoid challenging questions; allow the client to dream!

- Did you allow and follow yourself to feel the feelings? If so, how? How do you know? Using pauses, gives space to your feelings and allows you to separate yours from your clients'.
- As soon as you notice that your client is anxious or shutting down, use empathy and light a mini-Torch. Always use optimism to light the fire! Use mini-Torches periodically to keep the client's energy high throughout the meeting.
- Almost all solutions can be devised by the client. So, don't try to provide all kinds of smart solutions yourself, but give your client the opportunity to come up with the solutions themselves. The chances of the client following the solution are much greater if it is their own solution!
- Detach from your own ideas. Give your client enough space to draw their own conclusions.
- End each session in a way that strengthens your bond and radiates enthusiasm about your client's Torch.

*"What is meant by light?
To gaze with undimmed eyes
on all darkness."*

Nikos Kazantzakis

Meeting Preparation and Notes

Goals for the session:

- Re-Lighting the Torch
- Delve deeper into your client's vision and test its strength in the face of possible obstacles
- Using their own energy, motivate your client to remove any obstacles

Preparation for the session:

- Review the *Three Questions*, *Heart's Core Grid*, and *Ideal Day/Week/Year*
- Look for opportunities to compliment, get excited, enthusiastic, or moved by your client's plans
- Brainstorm potential obstacles and various solutions
- Think about what your own prejudices/sensitivities are in relation to your client's vision and obstacles

Agenda items for this session:

- “*Anything changed?*”
- Elaborate or deepen the vision by reviewing responses to the *Ideal Day/Week/Year* exercise
- Re-Light the Torch and be specific
- Gather a list of obstacles according to the client
- Share obstacles that you perceive (“the elephant in the room” by asking, “*Is it possible that ...?*”)
- Collect the solutions the client sees by following the method: What, How, When and Who to wrap up each obstacle

Tips:

- Start the session with an open mind (clear, open, and unbiased) and with an inspired heart (truly believing in the Torch and your client). Be prepared with ideas on their vision, possible obstacles, and possible solutions.
- *Gently* share any perceived obstacles after your client has shared their own list.
- Watch for your own biases, longings, and sensitivities
- Be creative and enthusiastic! Optimism lights the fire!
- If it is difficult to see your role or where the obstacles are, ask “*Where can I help?*”

Homework/action plans for the client:

- Fill in the form: *Goals for Your Life*
- Fill in missing data for the financial plan
- Begin taking action to resolve the obstacles

TRUST THE PROCESS

Knowledge

Meeting Preparation and Notes

Goals for the session:

- Together with your client, review the responses to the *Goals for Your Life* exercise during the meeting and, where necessary, further sharpen it
- Present and complete the financial plan in conjunction with the Life Plan

Preparation for the session:

- Prepare the plan/presentation that brings together the life goals and financial goals

Agenda items for this session:

- “*Anything urgent?*”
- Re-Light the Torch
- Go through the *Goals for Your Life* exercise in full and help your client tighten it up where necessary
- Present and complete the financial plan if that is part of the agreement

Tips:

- Come rested and prepared to the session.
- Keep relying on the client's energy and ingenuity. If the client cannot feel it within, then in Execution phase, the idea will usually die.
- So, don't be too attached to the outcome, nor to your own opinion and solutions.
- Remember that everything in this process is about the client.

Reflection:

- How did your client respond to the financial strategy and recommendations?
- How did you feel after this session ended?
- Is their Torch still burning? If not, any ideas about what happened? Any undiscovered obstacles? Immediately Re-Light the Torch, otherwise your client will lack the vigor to execute and stick with the plan.

Homework/action plan for the client:

- Study the plan and write down questions, thoughts, and ideas.
- Begin to implement the plan or further refine aspects of the plan.

TRUST THE PROCESS

Execution

Meeting Preparation and Notes

This session can follow the Knowledge Session or be a regular review meeting.

Goals for the session:

- Discuss progress in your client's life
- Discuss progress in the chosen financial strategy
- Make sure that the financial plan still matches your client's desired life

Preparation for the session:

- Review the plan and any correspondence with the client. Are there any thoughts, ideas, or action items to discuss?
- Do there appear to be any blocks in moving ahead with the (financial) plan?

Agenda items for this session:

- Ask “*Anything urgent?*” “*Anything changed?*”
- Re-Light the Torch
- Discuss the progress, updates, and new possibilities with their plan
- Outline next actions and implementation steps

Tips:

- Come rested and prepared to the session.
- Be prepared that your client's process (on the way to their ideal life) can be slower than you would like or expect. Be patient, stay positive, and encourage your client. You may have to carry the Torch until the client is ready to take it and run!
- Are there new or unresolved obstacles?
- At any time, you can revisit any step of the EVOKE® process in service of your client.

Homework for the client:

- Plan implementation

TRUST THE PROCESS