

## Uncovering Your Immunity to Change<sup>\*\*</sup>

A guide to the ground-breaking work of Robert Kegan and Lisa Lahey: A simple, powerful tool for learning to see and overcome the beliefs that hold you back.

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### HOW TO USE THIS GUIDE:

THIS IS MEANT TO BE A PRACTICAL, BUT NOT EXHAUSTIVE, OVERVIEW OF THE IMMUNITY TO CHANGE PROCESS DESIGNED BY HARVARD EDUCATORS ROBERT KEGAN AND LISA LAHEY. THE PROCESS WILL TAKE YOU ON AN INSIGHTFUL JOURNEY THROUGH YOUR OWN BELIEFS AND BEHAVIORS, AND SHOULD CREATE A FEW "LIGHT-BULB MOMENTS" ALONG THE WAY. IT'S MEANT TO BE A WORKBOOK, SO YOU'LL WANT TO PRINT IT OUT AND USE THE WORKSPACES PROVIDED AS YOU GO.

THAT SAID, THERE ARE A FEW THINGS YOU MAY WANT TO CONSIDER BEFORE YOU BEGIN.

FIRST, THERE ARE NO QUICK FIXES WHEN IT COMES TO SHIFTING OUR HABITS AND INGRAINED BEHAVIOR PATTERNS. CHANGE TAKES TIME.

SECOND, IF YOU REALLY PUT IN THE EFFORT TO GET THE MOST OUT OF THIS PROCESS, THERE WILL BE MOMENTS OF DISCOMFORT ALONG THE WAY. THAT'S OK. IN FACT, IT'S AN IMPORTANT PART OF THE PROCESS. IT ISN'T ALWAYS EASY TO LOOK AT THE BELIEFS AND BEHAVIORS THAT WE USE TO GET IN OUR OWN WAY, BUT WE CAN'T MAKE ANY REAL PROGRESS UNLESS WE'RE WILLING TO LOOK AT THE PLAIN TRUTH AND GET A LITTLE UNCOMFORTABLE.

LASTLY, CHANGE IS OFTEN MOST SUCCESSFUL WHEN THERE'S OUTSIDE ACCOUNTABILITY, OR AT LEAST VISIBILITY. SOME OF THIS PROCESS REQUIRES YOU TO LOOK AT YOUR ACTIONS AND EXAMINE YOUR BELIEFS, WHICH YOU CAN DO WITHOUT OUTSIDE HELP. BUT THE REAL WORK COMES IN AT THE END WHEN YOU GO OUT INTO THE WORLD TO TEST YOUR DISCOVERIES AND START EXPERIMENTING WITH CHANGE. AT THAT POINT IT CAN BE HELPFUL TO HAVE A TRUSTED FRIEND OR ADVISOR WHO'S AWARE OF WHAT YOU'RE WORKING ON, OR EVEN A DEDICATED COACH, TO HELP GUIDE AND ENCOURAGE YOU TO STICK TO IT WHEN THE GOING GETS TOUGH AND TO REMIND YOU OF THE PATH YOU'RE ON IF YOU GET SIDETRACKED OR LOSE PERSPECTIVE.

WHATEVER YOU DECIDE, REMEMBER TO BE KIND AND PATIENT WITH YOURSELF. WE DON'T TRANSFORM OVERNIGHT, AND PROGRESS ISN'T ALWAYS A STRAIGHT LINE. USE THIS GUIDE TO LEARN MORE ABOUT YOURSELF AND YOUR OWN CHANGE PROCESS. IF YOU REALLY LOVE THE CONCEPTS, PICK UP A COPY OF KEGAN AND LAHEY'S BOOK. IF YOU WANT TO TAKE IT EVEN FURTHER, GIVE ME A SHOUT AND I'LL BE HAPPY TO HELP YOU BRAINSTORM A STRATEGY TO SUPPORT YOU IN UNCOVERING AND OVERTURNING YOUR OWN IMMUNITY TO CHANGE SO YOU CAN LIVE A HAPPIER ,MORE EFFECTIVE, THRIVING LIFE.

> TAKE RISKS. LEARN THINGS. GROW. -CHAIM ROCHESTER



## INTRODUCTION

So here you are, at the beginning of another year. Hopefully by now you've started to emerge from the post-holiday food coma and get back into your routine. And if you're like many of us, you've got some sweet "new year, new me" goals that you're trying to incorporate into your life as well.

It's no secret that change is hard. And let's be perfectly honest - there's no silver bullet for any of it. There isn't one quote or skill or technique that I can impart to you that will magically solve all of your problems once and for all. There are, however, tools and strategies that can help you get to the core of your challenges and shed light on the reasons that you get stuck when trying to shift your patterns of belief and behavior. The goal of this guide is to give you a quick primer on a tool that I've found incredibly helpful in my own experience with resistance to change, and to support you in accomplishing the goals you have set out for yourself in the new year.

## **"IDEAS THAT WE HAVE, THAT WE DON'T KNOW WE HAVE, HAVE US."** - JAMES HILLMAN

Change is a tricky topic. We all struggle with it in one way or another on both a personal and professional level. There are many ways to approach change, and many theories about how best to manage it.

One in particular that I have found to be quite powerful is the Immunity To Change model developed by Harvard educators Robert Kegan and Lisa Lahey. The underlying concept behind the Immunity To Change model is that each of us has within us an "emotional immune system" that exists to protect us, but left unexamined can often cause us to get stuck when it comes to change.

This system is designed to keep us safe from fear, anxiety, and emotional discomfort. That's all well and good, except for the times when these discomforts are crucial to facilitating intentional change. Any time we try to change habits, there's going to be a necessary amount of uncertainty. When we're trying to change patterns that we've become used to, or build new ones that we aren't, our emotions can be triggered to protect against the unknown. Our commitment to the safe and familiar can rear up and get in the way of our change goals.

At the heart of the emotional immune system are our competing commitments - those safety-net beliefs and coping mechanisms that guide our thoughts and actions. Most often, we don't actually know what these commitments are or how they limit us. They live in our subconscious, working in the background to keep us balanced and on track.

The Immunity To Change process helps to uncover the obstructions in your emotional operating system, and allows you to consciously engage with them as you work toward successful change



### STEP 1: CLARIFY YOUR GOAL

The most important part of any change effort is planning. It's all too common in both personal and professional change efforts to say "I have problem X. Ready... Set... CHANGE!" The problem with this kind of thinking is that it doesn't give us an opportunity to clarify our goals, assess our current state, or build momentum for success.

As we undertake the Immunity process, it is important at this point to understand the difference between a technical goal and an adaptive one.

A technical goal requires you to change your skillset. For example, if you wanted to learn to do a handstand you could study and practice the technique until you were able to pull it off.

An adaptive goal requires a change in your *mindset*. Adaptive challenges require deeper shifts in thinking and behavior patterns. A common example would be losing weight.

Yes, there is a technical aspect to losing weight, but most

often there are underlying factors that make this more complex than simply eating differently. If it were as easy as making a technical change, we probably wouldn't have to make a resolution about it!

With that in mind, take some time and brainstorm your goal below. Then write a sentence that clarifies why this is an important goal for you to achieve. What's most important to you about reaching this goal? In what ways would reaching that goal make a difference for you? To your company? Is it the clearest version of your goal? Does it resonate with you on an emotional level? If so, great!

It can be helpful at this point to ask a trusted friend or advisor for input. Ask "knowing me, does this goal sound like the truest version of what would make me happier/ more fulfilled/more effective as a person?"

When you feel like you've got it down to the version that feels the most powerful to you (a 4 or 5 out of 5, emotionally), write it down at the top of column 1 on the immunity map (p. 6)

### MY ADAPTIVE GOAL:

Once you've got your clarified goal on the map, think of the actions you will need to take to accomplish it. List these under the goal in column 1. You could probably fill up a whole page with action steps, but for our purposes try to keep it to 5 or 6 concrete behaviors that would support your ultimate goal.



### STEP 2: WHAT ARE YOU DOING?

Now that you're crystal clear about your change goal and what you need to do to get there, you're probably starting to get all kinds of ideas about hitting the ground running and starting to check those actions off your to-do list.

STOP RIGHT THERE! That's exactly the sort of approach that causes so many people to fail at reaching their goals in the first place.

Before you launch into frantic action, you need to step back and do a bit of research. It is crucial to get an accurate picture of what's happening now before trying to initiate major changes, otherwise it's impossible to know what you're really up against. Our goal at this stage is to take a thorough, honest inventory of our current state.

For each of the actions you identified in column 1, ask yourself, "What am I currently doing, or not doing, instead of taking this action?" So if your goal was to become more financially responsible and the supporting action was to start putting money in a savings account every week, what are you doing instead? Spending \$10 a day on expensive coffee drinks? Eating out when you could cook at home for less?

How about what you're not doing - not going to the bank to find out what kind of account options they have? Not taking time to record your expenses each day or week? Hopefully that helps give you an idea of how to go about filling out column 2 of your map.

You might find yourself a little uncomfortable when you get going with this list. It can be quite eye-opening when you start putting things down on paper and getting a good look at your actions. At this point it's important not to give up. Don't beat yourself up about things as you go along and try not to judge your own behaviors as you recognize them. We'll dig deeper in the next steps to understand the reason behind these actions and why they actually make sense in terms of our emotional safety.



Take the list of "doing/not doing" items from the right side of this section and write them in column 2 of the map on page 6.



### STEP 3: FEARS AND COMPETING COMMITMENTS

Column 3 is where things really get interesting.

At the top of the column you'll see the "worry box," In this box, write down what you are afraid would happen if you changed each of your column 2 behaviors. For example, if you listed "spending too much money on coffee drinks" in column 2, what would you be afraid of if you stopped? Perhaps it would be a fear of not having anything to look forward to on your break at work. Or being left out if you always go for lattes with your friends on Saturday morning. Spend a little time and try to get to the root fear associated with changing each column 2 behavior.

Once you've listed your fears, it's time to reveal the competing commitments that create them. We do this by looking at the fears from a different angle.

Going with the same example, if "I'm afraid of being left out when my friends go for coffee," you can turn this around to say, "I am committed to NOT being left out." The commitments are typically in the form of a negative, something we are committed to NOT experiencing. This means that in order to prevent it from happening, we are protecting ourselves with our obstructive column 2 behaviors.

You may start to see it by now. Once you've completed column 3 for each of your conflicting behaviors, the map makes complete sense in reverse. Based on your commitments in column 3, *of course* you would exhibit the behaviors in column 2. If you're committed to not being left out, *of course* you're going to spend money on fancy coffee every time you go out with your friends!

As you complete your map you should experience a personal "light-bulb" moment. This is your first glimpse into the heart of the emotional immune system, the mechanism that makes your resistance to change much more understandable.

\*See the appendix at the end of this guide for more examples.

### WHAT AM I AFRAID OF ?:

WHAT WOULD HAPPEN IF I CHANGED MY COL. 2 ACTIONS?

WHAT DOES THAT MAKE ME COMMITTED TO?

Your fears go in the worry box on the map. The commitments get listed in the column below the worry box.



## More on Competing Commitments

Column three of the Immunity Map talks about your worry box and your competing commitments. This is one of the challenging areas of the process and it can be a little confusing at first, so let's break it down a bit further in order to get the most value from the exercise.

When we talk about the fears that drive our behavior, they typically boil down to two types. There are fears of the things we're trying to avoid, and fears of not getting what we hope to gain. Robert Kegan and Lisa Lahey use a great example in their workshops to help illustrate this.

There was a gentleman who was told by his doctor that he needed to take heart medication daily. Despite the possible dire consequences, he continued to ignore the doctor's advice. When asked "what would be your biggest worry if you took your medication every day," he became quite passionate and defensive. "If I have to take those damn pills every day, I'm going to feel like an old sick man like my father who's in the nursing home!" Upon hearing himself say it out loud, the man realized what Kegan was getting at. By acknowledging the fear, he could see that he had a hidden commitment to **not feel like a sick, old, over the hill man.** This was the hell that he was trying to keep away by holding on to the conflicting behaviors from the second column of his map - not taking the medication that could save his life.

This idea can be a little confusing and complex when we first start exploring it, but after a bit of thought and brainstorming you should start to get the hang of it. If you want a little more clarification, I recommend Kegan & Lahey's book "Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization"



#### UNCOVERING YOUR IMMUNITY TO CHANGE



Improvement Goal	What am I doing/ not doing instead	Hidden Competing Commitments	<b>Big Assumptions</b>
		Worry Box	
What I'd need to do differently to achieve my goal:			
		Competing Commitments:	
Write your clarified goal from the previous page at the top of this column. Next, specify the concrete behaviors that are necessary to achieve this goal. Make sure to frame them as positive statements (for example, "stick to a regular meal schedule" vs. "stop eating at random times during the day").	This is the part where we get deeply, maybe even painfully clear about where we stand. We must be fearlessly honest - we can't make progress if we can't take stock of where we're starting from. What are the things you do, or don't do, that most conflict with the behaviors you listed in column 1? Ex. "I wait until I get too hungry to	Your fears go in the "worry box." What are you afraid would happen if you did the opposite of your Column 2 behaviors? Ex. "If I plan my day ahead of time my life will become too rigid" The fears illuminate your hidden commitments. If I'm afraid of becoming too rigid, I could turn this around to say "I am committed to not	Big assumptions are the "beliefs and internalized truths we hold about how the world works, how we work, and how people respond to us. They are assumptions that make each hidden commitment feel necessary."* Look for assumptions that anchor and inform your specific hidden commitments. Notice how
Think about actions you can move TOWARD that will bring you closer to your goal, rather than those you need to move away from.	eat," or "I don't make time to plan for my day." Don't worry about explaining your behaviors at this point. Just notice them and write them down.	being bound to a rigid lifestyle." These competing commitments hold the key to your breakthrough. See page 3 for more detail on this.	your assumptions lead to the very behaviors that undermine, rather than support, your goal. Ex. "I assume that if I am seen as rigid, people won't like me and I'll be rejected."

# Column 4: Your Big Assumptions

Getting down to the Big Assumptions in the last column is where the map comes to life. This is where you really see how your emotional operating system is programmed, how you're wired to carry yourself through life.

Your Big Assumptions relate directly to your competing commitments. They answer the question: "What do you assume would happen if the thing you're trying to prevent in column 3 came true." They're usually in the form of "If \_\_\_, then \_\_\_" statements Using our previous example; if your commitment was to not be left out of social events (by not buying lattes with the rest of your friends), the assumption might be that "**If** I don't follow along, **then** I will be rejected." When we see that connection, it points out a strong tie-in to the emotional belief that's holding you back.

Some people find this part a bit confusing. Reference the sample maps for more examples if you need them, but also remember there is no "right answer" here. This is about exploring and discovering what is true for you so you can begin to break down your barriers to change. Big Assumptions reveal the lens through which we view the world. These are the ideas that have us, that dictate our approach to life and guide our choices, whether consciously or unconsciously. By creating visibility into them, we shine a light on the things that hold us back from change.

The competing commitments and big assumptions sections of the map are also where it's common to feel discouraged. It isn't always comfortable to discover the ways we undermine our own progress, but it is necessary if we want to truly break free of our limiting beliefs and achieve the goals that have been eluding us for so long.

#### UNCOVERING YOUR IMMUNITY TO CHANGE



## So now what?

At this point you should be looking at a completed map that sheds some light on the systems and structures that are obstructing progress toward your goals. It's a simple but challenging process, so you should definitely feel good about the work that you've done so far. At this point, most people go in a pretty predictable direction. "Ah ha! Now I see what I've been doing to block myself, I'm going to stop doing it!" If only it were that easy...

The real next step challenges you to hold off that part of the brain that is screaming for ACTION. If you launch directly into action, you're missing the point and going back down the same road we've been on that has failed to yield the results you want.

Looking at your Big Assumptions, the task is to design one or two SMART experiments: **S**afe & **M**odest - don't turn your whole life upside down, just look for a small change you can make that would challenge the Big Assumption; **A**ctionable - your test should be about trying a different *behavior*. Something you can actually do, not just a thought or idea; **R**esearch-based - remember, this is just a **T**est. The task at this point *is not to change your entire behavior*. You simply want to act against your Big Assumption in a small way and observe what happens as a result. The goal is to collect data – not to "improve" yourself.

Back to our example: The person who fears being left out in the group of their friends might decide "When I go for coffee with my friends from the office I'll just bring my own water bottle and not order anything." This plan involves a modest change in behavior. It's also something that can be done immediately. In addition, it's relatively safe: The statement involves only one behavior in a specific setting.

The SMART test is about "gradually building up a psychological space between ourselves and our Big Assumptions in order to move them from subject to object, where we can look at them, turn them around in our hands, and consider altering them."

- Robert Kegan & Lisa Lahey; "Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization"



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I hope you found this guide interesting and useful. Obviously there's no single solution or silver bullet for changing the patterns that hold us back. This is just one tool that I've found personally helpful and I wanted to share it with you in the hope that it can assist you as you reach for your own personal or professional goals.

If you're interested in going more in-depth with this process or seeking out coaching in support of your goals, please feel free to contact me. I'm here to support your success, and I can't wait to see where you'll end up.

Wishing you all the best in the year to come!

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1. Improvement Goal	2. Doing/Not Doing	3. Hidden Competing Commitment	4. Big Assumption
To be better at delegating 5+ This new leadership role is a wonderful opportunity for me to make a difference. But if I keep working the way I always have, I can't get to the more strategic issues. There's not enough time to do everything. I'm already too stretched, dropping balls, & stressed out. © Minds at Work	I don't prioritize; I don't separate the important from the urgent I don't plan my time well; am in constant catch-up mode I don't ask people to help me enough I don't say "no" enough	<ul> <li>I'll have fewer victories; I could be wrong; I could fail; I'd be dependent on others; I'll lose control</li> <li>I'm committed to: Not giving up fast hits of success/ small victories; experiencing myself as a winner</li> <li>Not finding out I'm wrong</li> <li>Not failing</li> <li>Not being dependent, weak. To not put my fate in other' s hands</li> </ul>	If I don't have fast hits of success, I'll be adrift & anxious. I need victories to know I'm on track If I find out I'm wrong, I don't deserve this leadership position If I fail, I'll let down everyone I care about Effective leaders get it right the 1 <sup>st</sup> time. We can't afford to make any mistakes in our business If I'm dependent on others, then I'm screwed when they don't deliver I can do it better than others can



1. Improvement Goal	2. Doing/Not Doing	3. Hidden Competing Commitment	4. Big Assumption
To be better at prioritizing; better at cutting away the clutter 4: I never feel relaxed, even when I'm doing things that ought to be relaxing. I'm too often thinking about what's hanging over my head. I'd like to stop that pattern so that I can both get	I don't focus(start, then stop) I let myself get distracted, e.g., I drift off with the internet! I work at what pops up (reactive over create) I don't have a plan	<ul> <li>I'll feel constrained, boxed in, I'll be bored &amp; boring to <u>myself and others</u></li> <li>To not feel contained or constrained</li> <li>To avoiding any discipline</li> <li>To not being bored</li> <li>To not miss anything</li> </ul>	If I feel contained, I will be unhappy Feeling free makes me happiest Any kind of a schedule will feel like a constraint & will reduce my joy If I'm bored, I'll lose my edge I must know everything, or I won't be successful All commitments are constraining
stuff done and relax otherwise. © Minds at Work			If I'm smart enough, I ought to be able to do everything I want



1. Improvement Goal	2. Doing/Not Doing	3. Hidden Competing Commitment	4. <b>Big Assumption</b>
To taking better care of myself (not be so stressed, exercise more, have more time to relax) 5: I'm exhausted. I don't feel like I can keep going like this.	I don't say 'No' enough I say "yes" without thinking it through I don't ask for help I schedule time for the gym but am too busy to go when the time comes	Fears: people would stop needing me; others, not me, would get the credit To not have people stop needing me to feeling indispensable / to being seen as indispensable To not lose getting the credit	<ul> <li>If I'm not indispensable I'm 2<sup>nd</sup> rate.</li> <li>If I'm not always available, then I won't be the "go to" person.</li> <li>My value depends on "doing"</li> <li>If I don't get the credit, I'll lose out on future opportunities</li> <li>Feeling indispensable &amp; getting the credit are more important to me than taking care of myself</li> </ul>



1. Commitment / Improvement Goal	2. Doing/ Not Doing	3. Hidden Competing- Commitment	4. Big Assumption
To not avoid conflict To having difficult / courageous conversations 5+! I expend huge amts of energy thinking and rethinking what to do and worrying about whether to say something, and if so, what to say. It's exhausting and a waste of time.	I don't state my opinion firmly (I sugar-coat my words, dance around the message, make indirect comments) I act as if things are okay when they're not (I talk about other topics; I don't make appointments to talk) I avoid without letting go of what I feel Without being clear about what I really think & feel, I don't	<ul> <li>I'll offend people; won't be liked; could anger the person; I'll be seen as vulnerable, <u>disagreeable &amp; needy</u></li> <li>To not offending people</li> <li>To not being disliked, disagreeable or seen as anything but a good guy</li> <li>To minimizing negative emotions</li> <li>To not getting myself upset &amp; angry</li> <li>To not being vulnerable; to not being needy</li> </ul>	If I offend people, am not liked, am vulnerable, am needy, I will be left alone If I make someone angry, they'll strike back, get out of control, I'll get upset & say the wrong thing. I'll ruin the relationship. If I'm not agreeable, people will avoid me. People want to stay on the surface; they don't really want to know me.
© Minds at Work	ask for what I want		

#### UNCOVERING YOUR IMMUNITY TO CHANGE



1. Improvement Goal	2. Doing/ Not Doing	3. Hidden/ Competing "Goal"	4. Big Assumptions
To be warmer and emotionally connected to myself and others	I limit communication to substance/ business and others (rather than me)	Fears: I'll lose control; Feel weak; feel uncomfortable; be dependent	If I give up my current degree of independence, then I will be vulnerable, others will mistreat my vulnerability, they won't care enough and I'll be disappointed. I will be hurt If I give up my current degree of
5: I feel constantly dragged down by all	feel constantly what would get at/to in control of		independence, the goodies may not be worth it ("I might even feel worse")
that I have to do. No joy in my work. I want to inspire my peers be inspired by them.	Once I decide, I convey finality (too little gray; more black and white)	Not being weak & vulnerable; Not getting close to my emotional "discomfort zone"	I assume that letting more people in will mean that I will have to own their problems I assume it's a zero-sum game—i.e., independence must necessarily be given in order to be more connected
© Minds at Work	I use other obligations as an excuse to withdraw I reserve a great deal of time for myself	Not being dependent	I assume, with regard to assessing whether the change would be "worth it" that the calculus I now use for assessing "worth it" must be the only calculus I would ever want to use



1. Improvement Goal	2. Doing/Not Doing	3. Hidden Competing Commitment	4. Big Assumption
To be a collaborative leader who taps into the collective wisdom of my	Coming to the table with a predetermined definition of the problem & solution Always framing &	Fears: I'll look & feel weak and soft; I'll lose my value proposition	If I look weak, people won't follow me/ my leadership I assume people want
leadership team	writing the meeting agenda	To not appearing or feeling weak	a leader who has the answers = strong
4+ I worry that all I'm doing is building a	Speaking more than any other member of the team	To not being anything but hugely important,	I assume people don't want to take
compliance culture on my team.	Taking charge of & running every meeting (rather than sharing	indispensable and value-adding;	responsibility anyway
Everyone does what I ask but I don't see them	this responsibility with others, even though I claimed they were leaders too)	To never appearing to be on off my game	If I am not indispensable, then I'm 2 <sup>nd</sup> rate
stepping up to the plate. I need, we need their best ideas to do this	Not asking for help when I need it	To be the hero/ star of the team (scoring the goals)	If I am not special, then I am replaceable
work.	© Minds at Work		



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1.	2.	3.	4.
Improvement Goal	Doing/Not Doing	Hidden Competing Commitment	Big Assumptions
		Communent	
To be less	I speak more than	Fears: I'll lose my	I won't be independent
autocratic =>	others	independence; be	unless I dictate and
Listen more,		seen as not useful;	control
empower others	I decide the	seen as ineffective;	
	agenda	won't be respected	My independence is
5: I know I offend			about getting you to do
people & they	l impose (over	To not being seen as	what I think makes
aren't bringing	suggest)	losing my	sense
their best to the		independence	
team; to engage	l criticize people		Other people's ideas
people; to become		To not be seen as	threaten my
a better leader. To		not useful	independence
treat others the		<b>T</b>	
way I want to be		To not be seen as	If I listen to other
treated. To feel		ineffective	people, I will lose my
better about		To not bo	perspective
myself.		To not be	My independence is
		disrespected	My independence is what makes me useful
© Minds at Work			