Using Five Roles to Support Growth Action Planning

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Abstract

A natural way of scheduling intentional growth is through designing action plans for specific weekly activities. This paper examines five roles that support growth action planning: guide, director, coach, scriptwriter, and performer. 20 Process Education (PE) practitioners who were interested in increasing their rate of growth capability development received self-growth coaching to advance their PE expertise through weekly action planning during the PE Expert Team Project (August 2021–August 2023). The protocol for this planning evolved into a Weekly Transition Methodology which began by reflecting on the previous week's results and generating insights that could be acted upon in the next time period. The writing of intentional action plans followed which included growth objectives, opportunities, and criteria. This became a standard practice that supported continuous improvement each week, with self-growth coaching support. Movement through these activities was made easier when taking the perspective of each of the five roles outlined in this paper. To assist others in adopting these perspectives, this paper discusses the alignment of these five roles with the 16 steps of the Weekly Transition Methodology. Performance descriptions for each role are then generated using the Methodology for Writing Performance Descriptions. Finally, performance criteria were upgraded to lay out the expectations of the performance.

Introduction

Growth action planning is a challenging endeavor because of the limits of self-determination and self-regulatory capabilities. Intentions are the starting point of any plan, such as a life plan or annual plan (Apple et al., 2021), but these often lack specificity and may misdirect attention to actions with little value for the planner's quality of life (QoL) or to unworkable options for attaining expected outcomes. Research on goal setting (Locke & Latham, 2019) and willpower (Vohs et al., 2008) has demonstrated many ways that outcomes are limited by human factors as well as by varied environmental conditions.

In this paper, the authors describe a set of carefully designed methods and roles is described that helped a group of Process Educators gain control over their intentions to pursue self-growth with assistance from a self-growth coach. During the two-year duration of the PE Expert Team Project (August 2021-August 2023), these participants learned to use five roles (i.e., imagined viewpoints). Each role helped with creating a useful mindset for specific steps in the activities involved in growth action planning. The use of these roles also made it easier to recognize the factors that must be addressed for developmental movement toward greater self-growth capability to occur.

We proceed by first discussing the literature behind action planning for growth and self-growth and the impact of perspective taking. This is followed by a brief discussion of the process which became the Weekly Transition Methodology (Apple, 2023) with the alignment of the five roles. We then examine performance descriptions and performance criteria for the five roles, concluding with considerations for further research.

Literature Review

Within the PE framework, several publications provide background about growth and self-growth functions (Leise et al., 2023), development of professional characteristics to overcome risk factors (Apple et al., 2018), and using the Self-Growth Methodology (Jain et al., 2020). Despite this, there are still many challenges when engaging in intentional growth planning. To make growth possible, it is necessary to produce and engage with a life history and other reflective work to establish personal ground rules for the direction and purposes of growth, a process similar to what Walsh et al. (2022) call "stories in action." Understanding the key characteristics of stories clarifies why they often are more useful for motivating change than directive interventions, such as government policies. Self-change is challenging but can be motivated and supported by gaining greater insight into one's own life development—one's ongoing story.

Intentions are key to growth action planning, but it is well known that regulating one's own intentions is prone to misinterpretation and disruptions from unforeseen impediments to action, even when carefully undertaken with self-awareness (Gollwitzer et al., 2009; Hagger, 2010). What seems clear at the outset often becomes muddled in

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the context of real-time situations that are difficult to control. Honey et al. (2023) examines the role of "psychological momentum" to understand the role of lingering memories from some experiences and when this continuity is helpful or disruptive to realizing present goals. The importance and meaning of an experience are processed differently by each individual and can occur as rumination that directs attention away from current objectives or keeps it focused on features that are not important in a present context—even though they were important in the past. Duckworth et al. (2018) analyze the limitations of willpower for sustained self-control to achieve a desired outcome, presenting a range of influences on efforts to make life changes such as environmental conditions and other external factors. Cognitive strategies are more useful in some situations than in others, so psychological perspectives, such as seeing the bigger picture, can make the difference in knowing how to size up possible strategies for realizing what one intends (Leise et al., 2023).

Bradford et al. (2023) examined executive functioning of adults ranging in age from 20 to 86 to evaluate the effects of age on perspective-taking, which is a component of an individual's "theory of mind". The study employed a previously standardized task in which an avatar "director" gives instructions to a participant about a 4 × 4 image of a cupboard of objects where some spaces are occluded from the director's view and some from the participant's view. The challenge is to inhibit an egocentric view and to account for the director's view with each instruction. An instruction might be "move the smallest candle" but the performer may need to realize that the director may be looking at a still smaller candle than the one they, the performer, sees. Varied tests were deployed to measure four subcomponents of executive function: inhibition, working memory, cognitive flexibility, and planning. Eye-tracking was used to detect when participants looked first at an item from their perspective—"egocentric bias" in looking. Advancing age was associated with more egocentric interference and increased time to orient attention to the correct task. Age significantly predicted reductions in all but the planning subcomponent of executive functioning. When there is more demand on memory, a greater need to inhibit alternative responses, and requirements for greater speed of cognitive flexibility in switching tasks, declines in perspective-taking decrease with age. Although this study illustrates the adult challenges in role-taking, the results are of a general nature and no remediation strategies were discussed. Of interest is the exemption of the executive function of planning, which did not show the same decrease as the other three subcomponents. The results are enlightening regarding the perspective-taking required to effectively use the five

roles of the self designed for the PE Expert Team Project to support growth action planning.

The Five Roles in Weekly Growth Planning

During the PE Expert Team Project (August 2021–August 2023), 20 PE practitioners interested in increasing their rate of growth capability development worked to create weekly action plans to advance their PE expertise with the assistance of a self-growth coach. The process for creating these weekly action plans, which elevated intentional growth from the previous week based on reflection, continued to be developed and refined. The result is the Weekly Transition Methodology (Apple, 2023) delineated in Table 1. The 16 steps within the methodology walk an individual through a process of developing weekly performance plans that realize the intention of growing capabilities and improving the quality of life.

As the participants worked weekly to proceed through the steps, perspective taking (Bradford et al., 2023) emerged as an effective means to guide oneself through the Weekly Transition Methodology (WTM). Five perspectives or *roles* as they became known, were termed Guide, Director, Coach, Scriptwriter, and Performer. The names were meant to invoke an image of a performance and/or the personal attributes one assumes in that role while working through the steps of the WTM. For example, the guide represents the attributes of someone who looks at life holistically in a non-judgmental and reflective manner, while seeking to improve their quality of life.

The alignment of the five roles with the steps of the WTM is included in Table 1. More specifically, the role of Guide is enacted in Steps 1 through 3 in continuously reflecting on life's moments to gain greater connection to life and its meaning. Their observations and related insights are shared with the Director, who, in Steps 4 through 7, uses these observations and insights to inform the Scriptwriter and Performer of new intentions. The Coach within Steps 8 through 12, identifies impediments in carrying out intentions, identifies growth objectives and the opportunities to intentionally grow the capability with criteria projecting the impact the growth will have in achieving the desired behavior. Then in Steps 13 through 15, the Scriptwriter lays out a considered vision for the week using these intentions and growth objectives to produce performance plans and active growth plans with a collection of best practices so the Performer can live the current week better than ever, moment by moment. Finally, in Step 16, the Performer is responsible for the metacognition of being in the moment which consists of knowing impediments, growth objectives, criteria for the moment, image of who you want to become, and new best practices to implement the performance plans.

Table 1 Alignment of the Five Roles with the Weekly Transition Methodology (Steps, Purpose, and Descriptions)

	Guide
1	**Improve Weekly Transition** Once you have set the transition point, when one week ends and the next week begins, pick a specific hour. Don't leave any time, but sleep, during this transition. For example, Saturday night and Sunday morning. The transition time could be 6 am – 7 am, Sunday morning. Each week assess this transition hour so you can improve upon its effectiveness. Plan a backup hour so that when a legitimate reason occurs you won't miss this week's transition.
2	**Monitor Monthly Progress** While the goal of weekly transition is to make each week better than the last, the real goal is to enhance one's impact, quality of life, and growth each week in relationship to one's annual measures, growth plans, project plans, and quality of life. These four areas should be reviewed once a month.
3	**Reflect on the Week** In using the Weekly Reflection Methodology (Apple, 2022), review the week, identify highs and lows, compare planned weekly outcomes against results, and take in the positive aspects of life. The key here is to collect a set of valuable observations and answer the question "Why?".
4	**Create Insights** Use the Insight Methodology (Leise, Dombi, & Apple, 2023) to produce approximately 5 new meaningful insights from the observations on last week's experiences. It is useful to use four sentences to clarify the insight: 1) observation, 2) implications, 3) significance, and 4) expanded impact.

	Director
5	**Decide on New Intentions** Based upon each insight, do you have a new intention that would improve any combination of impact, growth, or quality of life? Create a clear intention for each insight into what you want to do differently and why you want to do it differently. These are your new aims for the upcoming week.
6	**Top Weekly Outcomes** To forecast the upcoming week, identify the most important outcomes you want to produce from the upcoming week's efforts. Ask "Which results planned for the week would best contribute to quality of life, impact, and growth?".
7	**Decisions to Make** Becoming conscious of key decisions, immediate and pending, that should be considered this week helps you to understand how your actions influence these decisions before, during, and after each decision. *QoL decision making* is making decisions consciously by applying new intentions with impact, growth, and quality of life at the forefront of your consciousness.

	Coach
8	**Identify New Impediments** Clarify any new impediment that might have appeared during the week that caused you to perform less effectively than you wanted. Additionally, in analyzing your new intentions, do you perceive any limitation in carrying them out?
9	**Determine Three Growth Objectives** Based upon the new intentions, impediments, annual growth goals, and weekly outcomes, identify growth objectives that will increase your capabilities in carrying out these intentions to positively affect weekly outcomes. These growth objectives should be concise so they can be consciously considered during the activities of the week.
10	**Define Growth Opportunities** Explore the week and identify activities that provide challenges that require a higher level of use of the capability represented by the growth objective than currently possessed. Write this opportunity using the challenge and not just the activity. Additionally, identify efforts this week that would generate growth opportunities for future weeks.
11	**Create Criteria** Within each opportunity, you will identify a key performance that has the greatest impact on that activity's results. Within the performance, select a focus area. Define criteria that, if applied, would enhance the results, be influenced by the growth objective, and align with the new intentions.
12	**Visualize Desired Behavior** Step back and visualize this growth objective capability in action. What does it look like? Create this image as a dimension of your ideal self. The purpose is to monitor your actions in carrying out your growth efforts when you are in the moment, so you can self-mentor behavioral changes towards this image of your ideal self. Implementing an active growth plan is challenging and requires motivation. The best way to increase this motivation is to visualize and predict the impact that the growth plan will have on performance, results, and increased capabilities.

Scriptwriter		
13	**Collect Best Practices**	Continuous quality improvement in performance is the accumulation of practices that elevate performance towards the imagined behavior. You gain these practices by watching experts, self-assessing past performances, and accepting feedback from others, especially mentors.
14	**Prepare Performance Plans**	For the top opportunities in the week, develop and practice creating performance plans. The investment in the preparation will produce a greater return even considering the extra time invested. Before you start these activities, become ready by collecting all necessary resources and reviewing these plans.
15	**Schedule the Week**	With new intentions, growth opportunities, growth objectives, and growth plans developed, use the Weekly Scripting Methodology (Apple, 2024) to schedule the week to optimize productivity, quality of life, relationships, growth, and wellness. You will want to know what, how, why, when, where, and with whom you are going to do each activity. Script both professional time and personal time, leaving about 30% for flexibility for contingencies (unexpected events and new opportunities).

Performer		
16	**Live in the Moment**	When executing your script, be in the moment. Monitor your behaviors and actions to determine which you want to change to enhance 1) growth objectives, 2) improve performance with the criteria, 3) move closer to the image of your ideal self, 4) mitigate your impediments, 5) see synergy, or 6) adapt the best practices effectively. This reflection-in-action allows you to mentor your own development. After the moment is over, reflect to gain insights to decide what you will do differently the next time, i.e., an after-action-reflection.

Performance Descriptions and Criteria for the Five Roles

The alignment of each of these roles with the steps of the Weekly Transition Methodology is made clearer through the role's performance description and criteria. The performance description for each role was created using the Methodology for Writing Performance Descriptions (Nelson et al., 2020). The Quality Framework Model (El-Sayed et al., 2020) was used to delineate the 15 characteristics of quality for each role in order to incorporate them into the description. Finally, performance criteria were upgraded to lay out the expectations of the performance. For each of the five roles, an overview of the associated steps in the Weekly Transition Methodology is provided. Next the performance description for the role is presented. Finally, the performance criteria for each role are delineated.

Guide

This role helps to guide the individual through the first four steps of the Weekly Transition Methodology. More specifically, the Guide works to improve the weekly transition (Step 1), helps to monitor monthly progress towards QoL improvement goals (Step 2), reviews and reflects on the past week to utilize life's moments for gaining greater connection to life and its meaning (Step 3), and generates new insights (Step 4).

Performance description

The Guide helps the individual take time out to effectively reflect and ponder on key moments and develop significant insights to determine how meaningful each moment was. They will use these explorations to help clarify who the individual is and what life qualities they value in a caring, nonjudgmental manner. To create greater meaning, the Guide will compassionately consider the high and low moments in life as well as reflect with gratitude on the many positive aspects of their life. They will use this meaning to help determine who they wants to become by defining their ideal self. This increased metacognition allows the Guide to act as an inner compass to guide and ensure that actions, decisions, and behaviors align with personal values, intentions, and efforts to develop the ideal self. While the Guide must use skills in the cognitive domain, all other domains must also be leveraged or aspects that connect the whole being will be missed while trying to enhance their ongoing life journey and quality of life. Being open to insight and elevated meaning can help the individual explore ways that differ from their usual expectations and intentions. New meaning gained in this way often causes necessary refinement of the ideal self and how the individual wants to share their journey with others, especially those most important. Ongoing weekly reflection helps the Guide to empower the individual so they can correct actions and behaviors that are inconsistent with their ideal self, especially when that ideal self continues to change and evolve.

Performance Criteria

- **Recognizes meaning in life:** Is aware of what they contribute to their own and others' lives, what brings happiness, wellbeing, relationships, and opportunities to life in becoming one's ideal self

- **Being true to self:** Provides the inner compass to determine if actions, decisions, and behaviors match the values and intentions that lead to becoming one's ideal self

- **Being open to the unknown:** Challenges behaviors that limit experiences by not choosing to not filter meaningful emotions, thoughts, relationships, diversity of senses, activities, and mindsets

- **Valuing others as self:** Questions compassion situationally to determine what type of caring is most appropriate to meeting the needs of others

- **Valuing reflection:** Schedules time weekly for processing life experiences and creating insights that help to create new intentions and expand the vision of one's ideal self

- **Being nonjudgmental:** Has a soothing, caring, and compassionate demeanor even when actions vary significantly from personal and societal values

Director

The Director role is invoked during Steps 5 to 7. The Director will utilize the insights to determine new intentions (Step 5), leverage these to determine the top weekly outcomes (Step 6), while considering decisions that need to be made (Step 7).

Performance description

The Director of the individual's life oversees the other four roles and creates the road map for those roles' work in improving quality of life. The Director sets the inspiration for what the individual wants to do in life and how to make that happen by creating a life vision. The Director uses the Self-Growth Methodology (Jain et al., 2020) to guide the development of plans to provide this road map. By continuously questioning and assessing past experiences, the Director gains additional insights into how to live life better. These collective insights provide new direction, creativity, and energy helping the Director to generate new intentions with justified and compelling reasons. The Director examines the implications of current intentions, the stress they induce, and their significance from the perspective of the ideal self, quality of life, and any identified impediments so efforts can be taken in stride.

Performance Criteria

- **Visioning the Future:** Intuits future possibilities so that the plans provide a road map for other roles to follow

- **Constant questioning:** Determines what can be improved, what is missing, what can be enriched, what is in the way (impediments), what has been learned, and what different actions can be used

- **Assessing scripting:** Assesses the previous week's script to improve the current week's scripting based upon reflection

- **Assessing the performer:** Allows for a distancing of the individual from the extensive weekly effort and objectively reflects on quality of life, outcomes, growth, and both highs and lows so that assessments can be carried out effectively

- **Assessing one's reflection capability:** Reflects on the practice of reflection to improve its productivity by increasing meaning and purpose in reflection practice

- **Expert in following the Self-Growth Methodology:** Helps others to understand the relationship between stages, steps within stages, and the synergy within and across stages of the Self-Growth Methodology

- **Assessing the Coach:** Reflects on the previous week's growth to see the effectiveness of the active growth plan and determine how it can be improved

Coach

The Coach role is enacted during Steps 8 through 12. The Coach identifies impediments to progress when carrying out intentions (Step 8). They identify growth objectives (Step 9) and the opportunities to intentionally grow identified capabilities (Step 10) as well as setting the criteria for this growth (Step 11). Finally, the Coach paints the picture of the impact the growth will have in achieving the desired behavior (Step 12), thereby motivating the individual.

Performance description

The Coach is the catalyst who develops an active growth plan that is focused on creating the next iteration of self by setting growth objectives to mitigate the impediments limiting the new intentions shared by the Director. The Coach consistently challenges the status quo through extensive questioning, developing growth interventions, and creating growth opportunities. Because the Coach believes so strongly in unlimited potential, they strive to develop self-growth capabilities, including strengthening learning, growth, and mentoring skills. The Coach, who has strong shoulders to lean on, actively listens to the voices of the other roles to determine which performances are to be strengthened during growth opportunities, generates the performance criteria, and develops the performance plans to support the identified intentions and increase the quality of performance. The Coach assesses past performances to select the best practices that will support the change of behavior necessary to actualize

the new intentions within these opportunities. These best practices are incorporated into the active growth plan for each activity that includes defining the criteria, having an image of ideal self, visualizing the successful results, scripting one's actions, and defining specific growth objectives which will permit metacognition in the moment for the Performer. Because this ongoing process is very strenuous, the Coach understands the importance of balancing growth efforts within the active growth plan with renewal and celebration of successes. The Coach is in charge of researching new strategies for plans that did not yield successful growth moments. The Coach also continuously assesses their coaching to validate that it provides an improved quality of life, produces a greater impact, and encourages the development of new capabilities as a self-grower.

Performance Criteria

- **Challenging:** Constantly questions life satisfaction, intentions, impediments, and the selection of growth objectives

- **Questioning:** Whenever something is not crystal clear, asks a question that will enhance thinking to improve clarity

- **Impediment identifier:** Predicts impediments that will get in the way of new intentions or, through reflection on past experience, ferrets out what slows down new intentions

- **Develop self-growth capabilities:** Is aware of which components of self-growth capability are in play at any given time (each current activity favors 1 to 3 simultaneous components)

- **Active listener:** Attentively listens to one's own thinking so comments can be provided that will enhance the thought process, the quality of results, and the alignment of efforts towards goals

- **Proactively intervenes:** Is always present, available without intrusion, and adds value without getting in the way, much like top-notch wait staff

- **Model the practice:** Models the self-growth process publicly, understanding that helping others leaves plenty of time for oneself

- **Self-assessor:** Selects the appropriate past performances to obtain best practices for current growth opportunities by aligning past strengths with ideas for areas of improvement

Scriptwriter

The Scriptwriter role is enacted during Steps 13 to 15. The Scriptwriter identifies best practices that will help achieve the visualized behavior identified by the Self Growth Coach (Step 13). They then lay out a considered vision for the week using the intentions and growth objectives to produce performance plans for the identified opportunities (Step 14). Finally, using the Weekly Scripting Methodology (Apple, 2024), the Scriptwriter creates a script for the week (Step 15).

Performance description

The Scriptwriter intentionally makes each day better than the last by optimizing an efficient, systematic schedule to improve daily outcomes, performance capability, growth, and quality of life. This schedule aligns the weekly script, from the perspective of one's ideal self, with desired weekly outcomes, annual measures of success, and life goals. The Scriptwriter prioritizes what matters most to optimize the desired impact and productivity. They constantly strive to find new growth opportunities that are a strong fit for the new intentions, growth objectives, and growth plans provided by the Director and Coach. The Scriptwriter chooses the appropriate activities and designs performance plans that will contribute effectively to weekly outcomes while increasing growth capability and improving quality of life. They finalize the daily schedule to ensure it is well-balanced by providing time for learning, the preparation for key activities, strengthening relationships, enhancing self-care (taking care of personal needs as well as exercise). The Scriptwriter ensures that each activity has as its focus something the individual wants to do. Further, the Scriptwriter is clear over why any activity is on the schedule, knows what is to be accomplished, how the activity is to be approached, when it will occur, where it will happen, and with whom.

Performance Criteria

- **Outcome focused:** Imagines how to make the current week a very productive one by matching intentions and growth objectives to potential activities to increase the week's outcomes

- **Optimizer:** Allocates time in appropriate balance among the QoL domains so that overall quality of life is maximized by increasing impact and growth from the activities the individual wants to perform

- **Strategic:** Uses weekly challenges, contexts, growth opportunities, and relationships to allocate time to maximize planned outcomes, productivity, quality of life experiences, and personal well-being

- **Systematic:** Uses a systems model of the week to make sure that each component or segment of the week is synergistically connected with the potential of producing a powerful weekly experience

- **Efficient:** Has a developed process for thinking through the desired outcomes, various contexts,

requirements, relationships, needs, and growth opportunities so that there is an increase in quality of life experience, accomplishments, growth, productivity, and well-being

- **Scheduler:** Once a completed picture of the week is produced, the Scriptwriter schedules it, leaving valuable discretionary and contingency time so the individual can stay on schedule but also deal with the unexpected

Performer

The Performer role is enacted during Step 16. Utilizing the weekly script, the Performer is responsible for the metacognition of being in the moment which consists of knowing impediments, growth objectives, criteria for the moment, an image of who the individual wants to become, and new best practices to implement the performance plans. The Performer tries to live the current week better than any previous, moment by moment.

Performance Description

The Performer of one's life, who loves to perform well, regulates the intentions and contributions to weekly outcomes by implementing performance and growth plans. They enter planned opportunities fully engaged by knowing the performance, key focus area for development, others' expectations, performance criteria, and the details of the performance plan to passionately implement that plan. When necessary, the Performer implements a learning plan and has practiced and rehearsed the growth and performance plans for the upcoming context to best prepare the individual for the performance. The Performer adopts a mindset that allows for forethought, openness, focus, energetic engagement, and positivity. The Performer's full engagement increases intersubjectivity by having an image of the ideal self, specific growth objectives, impediments, criteria for the moment, and the new best practices to implement within the performance plans. During the moment, the Performer increases presence by improvising, thinking quickly, monitoring the individual's actions, and mentoring new actions that are adapted from the script to meet the needs of the situation. After critical moments, the Performer conducts a short reflection over what happened, whether expectations and outcomes were exceeded, and how the moment met personal needs.

Performance Criteria

- **Mindset:** Enters each activity or event with forethought, openness, focus, positivity, and an assessment mindset, so that the moment is maximized for both quality of life and growth development

- **Engaged:** Knows the script, context, opportunities, expectations, performance criteria, and performance plan details so that the individual can be productive and accomplished

- **Passionate:** Puts their heart into each scripted activity as if it is their last act in their life's play

- **Reflect in action:** Monitors the individual's actions, analyzes them, and improves upon their quality in continuing with future actions

- **Growth oriented:** Focuses on what can be done to improve on the past by having activated action plans with purpose during the current activity

- **Self-Assessor:** Uses the current context in preparation for upcoming opportunities by transferring strengths (best practices), creating new action plans for improvement, and pulling new learning forward

- **Improvisor:** Enjoys the challenge of performance, knowing the intentions of others, and flexibly adapts in response to new issues while continuing to focus on growth and performance outcomes

Conclusions

These five roles offered here include acting as one's own guide, director, coach, scriptwriter, and performer, all of which emerged as effective perspectives during the PE Expert Team Project where 20 PE practitioners worked to increase their capability in producing weekly action plans using the Weekly Transition Methodology. This research was not meant to provide all the nuances of the Weekly Transition Methodology. The complexities of that methodology, which contains other methodologies, are beyond the scope of this work. Our focus has been providing an overview of the five roles or useful perspectives that can assist an individual as they work through the steps of the methodology.

We are often encouraged to seek help from others (e.g., self-help books). When we do this, we give others control over the roles of Guide (choosing what is best), Director (making decisions) and Coach (motivating and encouraging us). This leaves us with only some control over the roles of Performer (doing) and Scriptwriter (planning). If we learn to take on these five roles ourselves, we are then able to determine and regulate our lives to a greater degree, living according to our own vision and guided by our own inner compass.

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