

SAMPLE

<Your Client Name Here>

My Values Insights™

<Consultation Dates Here>

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values are ideals that give significance to our lives, that are reflected through the priorities that we choose, and that we act on consistently and repeatedly.

Brian P. Hall, (Founder of values Technology)
values Shift

<Your Client Name Here>
My Values Insights™
Date: <Consultation Dates Here>

MY VALUES INSIGHTS™ - Getting Started

Values are literally everywhere! They are embedded in the stories we tell and hear; the way in which we observe and interpret the world; and how they influence the decisions we make both personally and professionally. Making sense of our values provides opportunities to shape our world and deepen skills to accomplish our priorities.

The desired outcome of this activity is to make those values explicit and to explore how they influence your life.

Navigating My Values Insights™

My Values Insights™ is assembled using your values selections from your online survey. These selections are incorporated into the graphs and reports found in the following pages. Your coach will walk you through your report step by step, explain what each page means, and explore with you the connections to your life and leadership experience.



About My Values Insights™

My Values Insights™ is prepared for you and your values facilitator by the dedicated team of values practitioners at *the Values Hub*. We are dedicated to providing resources for gaining values insight in one's personal life, relationships, and workplace teams.

Thank you for the privilege of exploring your values and experiences with you in conversation.

<Your Name Here>

Values Coach
<Consultation Dates Here>

Purpose and Desired Outcome



1. *Identify* my values that provide security, daily focus, and help me navigate towards the future.
2. *Reflect* on the values that inform my view of the world.
3. *Grow* from insights gained in reviewing my values and what I believe about myself, my relationships and place in the world.
4. *Prepare* to develop new values-integrated skills.

[Visit The Values Hub](#)

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INSIGHT I: MY VALUES - OVERVIEW

My Values List – Goals Values

The following tables (this page and next) illustrate the number of times values are chosen. The values selected in the online inventory you completed are sorted by number of times selected (4 being most; 1 being least), and listed in the tables according to the stage in which the value is found on the Values Map. Along with your facilitator, you will have opportunities to explore the significance and influence of your selections.



[Definitions Navigator](#)

Goals Values			
Times Selected – 4	Times Selected – 3	Times Selected – 2	Times Selected – 1
Stage 5: Equality/Liberation	Stage 6: Being Self Stage 4: Belief/Philosophy/Value Stage 4: Play/Recreation Stage 3: Self-Worth	Stage 8: Ecology/Global Stage 7: Truth/Wisdom Stage 6: Knowledge/Insight Stage 4: Competence/Confidence Stage 3: Family/Belonging	Stage 6: Art/Beauty Stage 6: Construction/New Order Stage 5: Service/Vocation

SAMPLE

My Values List – Means Values

Means Values			
Times Selected – 4	Times Selected – 3	Times Selected – 2	Times Selected – 1
Stage 6: Accountability/Ethics Stage 5: Equity/Rights Stage 4: Technology/Science	Stage 6: Education/Knowledge Stage 6: Research Stage 5: Congruence Stage 5: Empathy Stage 5: Expressiveness/Joy Stage 5: Mutual Obedience Stage 5: Sharing/Listening/Trust Stage 4: Ownership Stage 3: Endurance/Patience Stage 2: Sensory Pleasure Stage 2: Wonder/Curiosity	Stage 7: Community/Personalist Stage 6: Community/Supportive Stage 6: Leisure Stage 5: Adaptability/Flexibility Stage 5: Authority/Honesty Stage 5: Quality/Evaluation Stage 5: Relaxation Stage 5: Search/Meaning/Hope Stage 4: Loyalty/Fidelity Stage 4: Management Stage 4: Memberships/Institution Stage 4: Rule/Accountability Stage 3: Equilibrium	Stage 7: Prophet/Vision Stage 6: Complementarity Stage 6: Creativity Stage 6: Detachment/Solitude Stage 6: Mission/Objectives Stage 6: Mutual Accountability Stage 6: Pioneerism/Innovation Stage 5: Decision/Initiation Stage 5: Generosity/Compassion Stage 5: Limitation/Acceptance Stage 4: Communication/Information Stage 4: Competition Stage 4: Duty/Obligation Stage 4: Economics/Success Stage 4: Efficiency/Planning Stage 4: Law/Rule Stage 4: Productivity Stage 4: Reason Stage 4: Responsibility Stage 4: Unity/Uniformity Stage 4: Workmanship/Art/Craft Stage 3: Care/Nurture Stage 3: Obedience/Duty Stage 3: Rights/Respect Stage 1: Function/Physical

INSIGHT II: FOUNDATION, FOCUS, VISION

Foundation, Focus, and Vision Exploring the relationships between foundation, focus, and vision, goals and means values.	
VALUES INSPIRING VISION “vision values pull people forward to the future”	
<u>GOALS VALUES</u> Equality/Liberation-4 Being Self-3 Ecology/Global-2 Truth/Wisdom-2 <u>MEANS VALUES</u> Accountability/Ethics-4 Equity/Rights-4 Education/Knowledge-3 Research-3	
VALUES PROVIDING FOCUS “focus values are the values in which people invest time and energy every day”	
CONTEXT (Internal/Subjective Reality)	CONTEXT (External/Objective Reality)
<u>GOALS VALUES</u> Self-Worth-3 Family/Belonging-2 <u>MEANS VALUES</u> Endurance/Patience-3 Equilibrium-2 Care/Nurture-1	<u>GOALS VALUES</u> Belief/Philosophy/Value-3 Play/Recreation-3 Competence/Confidence-2 <u>MEANS VALUES</u> Technology/Science-4 Ownership-3 Loyalty/Fidelity-2
VALUES ANCHORING FOUNDATION “foundation values provide stability to people so they can maintain focus and move towards their vision for the future”	
<u>GOALS VALUES</u> <u>MEANS VALUES</u> Sensory Pleasure-3 Wonder/Curiosity-3 Function/Physical-1	

My Values – Stages Distribution Map

For ease of reading, the four-part coloration of the four phases is removed on this part of *My Values Insights™*.

“the world is a mystery over which I have no control” Phase I SURVIVING		“the world is a problem with which I must cope” Phase II BELONGING		“the world is a creative project in which I want to participate” Phase III SELF-INITIATING		“the world is a mystery for which we care on a global scale” Phase IV INTERDEPENDENT	
Stage 1: SAFETY	Stage 2: SECURITY	Stage 3: FAMILY	Stage 4: INSTITUTION	Stage 5: VOCATION	Stage 6: NEW ORDER	Stage 7: WISDOM	Stage 8: WORLD ORDER
GOALS VALUES							
		Self-Worth-3 Family/Belonging-2	Belief/Philosophy/Value-3 Play/Recreation-3 Competence/Confidence-2	Equality/Liberation-4 Service/Vocation-1	Being Self-3 Knowledge/Insight-2 Art/Beauty-1 Construction/New Order-1	Truth/Wisdom-2	Ecology/Global-2
MEANS VALUES							
Function/Physical-1	Sensory Pleasure-3 Wonder/Curiosity-3	Endurance/Patience-3 Equilibrium-2 Care/Nurture-1 Obedience/Duty-1 Rights/Respect-1	Technology/Science-4 Ownership-3 Loyalty/Fidelity-2 Management-2 Memberships/Institution-2 Rule/Accountability-2 Communication/Information-1 Competition-1 Duty/Obligation-1 Economics/Success-1 Efficiency/Planning-1 Law/Rule-1 Productivity-1 Reason-1 Responsibility-1 Unity/Uniformity-1 Workmanship/Art/Craft-1	Equity/Rights-4 Congruence-3 Empathy-3 Expressiveness/Joy-3 Mutual Obedience-3 Sharing/Listening/Trust-3 Adaptability/Flexibility-2 Authority/Honesty-2 Quality/Evaluation-2 Relaxation-2 Search/Meaning/Hope-2 Decision/Initiation-1 Generosity/Compassion-1 Limitation/Acceptance-1	Accountability/Ethics-4 Education/Knowledge-3 Research-3 Community/Supportive-2 Leisure-2 Complementarity-1 Creativity-1 Detachment/Solitude-1 Mission/Objectives-1 Mutual Accountability-1 Pioneerism/Innovation-1	Community/Personalist-2 Prophet/Vision-1	

*Ecology/Global changed to Ecology/Global Sustainability (November 2019)

Hall-Tonna Values Map

PHASES	"The world is a mystery over which I have no control" PHASE I SURVIVING PRE-CONVENTIONAL				"The world is a problem with which I must cope" PHASE II BELONGING CONVENTIONAL				"The world is a creative project in which I want to participate" PHASE III SELF-INITIATING POST-CONVENTIONAL				"The world is a mystery for which we care on a global scale" PHASE IV INTERDEPENDENT GLOBAL ETHIC AND MORALITY							
	T1				T2				T3											
STAGE	1 SAFETY		2 SECURITY		3 FAMILY		4 INSTITUTION		5 VOCATION		6 NEW ORDER		7 WISDOM		8 WORLD ORDER					
GOALS VALUES – MY VALUES-INTEGRATED HOPES AND ASPIRATIONS																				
GOALS VALUES	Self-Interest/Control Self-Preservation Wonder/Awe/Fate		Physical Delight Security		Family/Belonging Fantasy/Play Self-Worth		Belief/Philosophy Competence/Confidence Play/Recreation Work/Wealth		Equality/Liberation Integration/Wholeness Self-Actualization Service/Vocation		Art/Beauty Being Self Construction/New Order Contemplation Faith/Risk/Vision Human Dignity Knowledge/Insight Presence		Intimacy/Solitude Truth/Wisdom		Ecology/Global* Global Harmony Word					
MEANS VALUES – THE SKILLS I NEED TO ARRIVE AT MY GOALS VALUES																				
MEANS VALUES	Food/Warmth/Shelter Function/Physical Safety/Survival		Affection/Physical Economics/Profit Property/Control Sensory Pleasure Territory/Security Wonder/Curiosity		Being Liked Care/Nurture Control/Order/Discipline Courtesy/Hospitality Dexterity/Coordination Endurance/Patience Equilibrium Friendship/Belonging Obedience/Duty Prestige/Image Rights/Respect Social Affirmation Support/Peer Tradition		Achievement/Success Administration/Control Communication/Info Competition Design/Pattern/Order Duty/Obligation Economics/Success Education/Certification Efficiency/Planning Hierarchy/Order Honour Law/Rule Loyalty/Fidelity Management Membership/Institution Ownership Patriotism/Esteem Productivity Reason Responsibility Rule/Accountability Technology/Science Unity/Uniformity Workmanship/Art/Craft		Adaptability/Flexibility Authority/Honesty Congruence Decision/Initiation Empathy Equity/Rights Expressiveness/Joy Generosity/Compassion Health/Healing Independence Law/Guide Limitation/Acceptance Mutual Obedience Quality/Evaluation Relaxation Search/Meaning/Hope Self-Assertion Sharing/Listening/Trust		Accountability/Ethics Collaboration Community/Supportive Complementarity Corporation/Stewardship Creativity Detachment/Solitude Discernment Education/Knowledge Growth/Expansion Intimacy Justice/Social Order Leisure Limitation/Celebration Mission/Objectives Mutual Accountability Pioneerism/Innovation Research Ritual/Communication Simplicity/Play Unity/Diversity		Community/Personalist Interdependence Minessence Prophet/Vision Synergy Transcendence/Solitude		Convivial Technology Global Justice Human Rights Macroeconomics					
STEP	FOUNDATION					FOCUS					VISION									
	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
CYCLE	1 AUTHORITARIAN		2 PATERNALIST			3 MANAGER			4 FACILITATOR			5 COLLABORATOR			6 SERVANT			7 VISIONARY		
T1 – The Genesis Transition					T2 – The Grand Transition					T3 – The Omega Transition										

*Now Ecology/Global Sustainability (November 2019)

INSIGHT III: LIFE TRANSITIONS

Developing as a Person

Developing as a person is never a straight line. Development moves us forward, but sometimes we retrace our steps to regain strength, address difficult issues, or develop new skills. The open dot and the closed dot on the following table indicates your steps of personal and leadership development. The closed dot is the current leadership development step (acquired), and the open dot is the leadership style to which you aspire. These two steps correspond with the cycles of leadership at the bottom of the Values Map (Authoritarian, Paternalist, Manager, Facilitator, Collaborator, Servant, and Visionary) – we call this the Leader’s Life.

Read more about the *Leader’s Life* either in the last section of *My Values Insights™* or [click here](#) visit the Values Hub and click on the applicable tab under the menu header, “The Leader’s Life”.

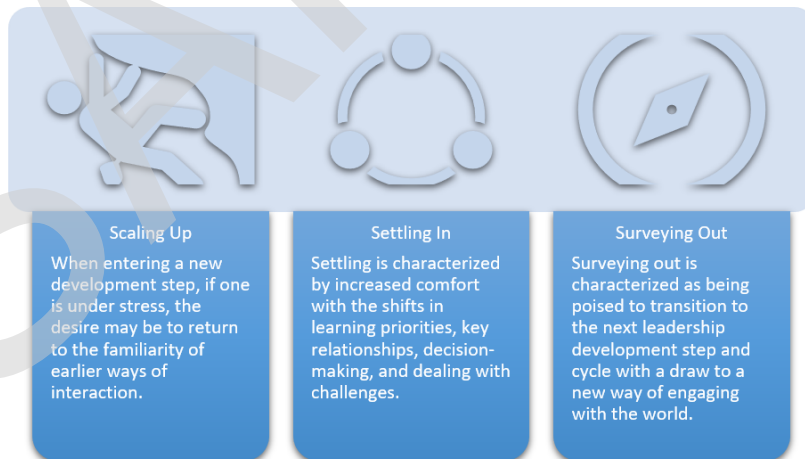


Conversation with your facilitator will support insight into these important development steps.

- Current Leadership Development Step
- Aspired Leadership Step

Foundation			Focus					Vision												
								●		○										
0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Cycle 1 Authoritarian			Cycle 2 Paternalist			Cycle 3 Manager			Cycle 4 Facilitator			Cycle 5 Collaborator			Cycle 6 Servant			Cycle 7 Visionary		

There are three steps of leadership development in each cycle. From the table above, if one’s *closed dot* is in step nine, that step would be scaling, Step 10 settling, and Step 11 surveying. The following diagram provides a synopsis of how people move through personal and leader development. Each leadership step within the seven leadership cycles presents a unique set of challenges along the journey of personal development.



Three Transitions

There are three *transitions* located across the top of the Values Map. These are indicated by the three tabs – T1, T2, and T3, and are known as: *The Genesis Transition*, *The Grand Transition*, and *The Omega Transition*. Your facilitator will explain and explore these with you.

Phase III Worldview – Important Notes

The worldview of Phase III states, “the world is a creative project in which I want to participate.” As one moves to a Phase III worldview, sources of authority shift from external authorities to internalized controls. Phase III a time in life where one begins to trust your own principles and take self-initiating action – it is the beginning of personal empowered. Creativity increases, and a willingness to act in ways that would have seemed too risky before. Your attention now turns to using your skills to create a better world.

- A new understanding that the from the notion that world is externally driven to recognizing that the world is engineered and created by one’s self – *from them to me*;
- Emphasis on knowledge as the source of developing transformational learning communities;
- Shifting from a fragmented/compartimentalized worldview to one that sees the world as interconnected – complex and yet profoundly meaningful; and
- Feeling a significant pull towards a Phase IV orientation around the values of human rights, justice, and convivial technology.



[Definitions Navigator](#)

Values Insight



Under stress or duress, one may often return to more comfortable or familiar patterns of behaviour found in earlier stages of development. Sometimes, transitions in life will elicit feelings of being at a crossroads – opportunities for trying new approaches.

Sounds exciting? Transitions can be the source of stress and uncertainty. Insight is essential for the successful navigation of life’s transitions.

INSIGHT IV: THE LEADER'S LIFE

Leadership Profile

The Leaders' work is informed by their personal values, and by the relationship between those values and the dominant values of one's organization. It's all part of your journey of personal and professional development. A leader's life is informed by how one faces adversity, how they make ethical and moral decisions, and how well they develop and manage personal and professional relationships. This is an essential part of the leader's commitment to learning throughout life – learning in informal and formal settings, and from the many experiences the leader faces.

Four Themes

The Leader's Life focuses on four life and workplace themes leaders face:

- Lifelong Learning – desire to gain knowledge, skills, and wisdom throughout life.
- Healthy Relationships – capacity to develop and nurture key relationships.
- Wise and Ethical Choices – processes for quality decision making.
- In the Face of Adversity – strategies for adapting to change and stress in life and the workplace.

You may access the details of the Leader's Life from the *Participant Handbook* or visit [the resources page](#) at the Values Hub and scroll down – each of the leader's life options are on the left.



[Definitions Navigator](#)

