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Look, Then Commit

The Quarterly Snapshot and The Becoming Plan: a quarterly practice for leading a deliberate life

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The Quarterly Snapshot and The Becoming Plan are instruments of the Choose Becoming program, Infinitum Leadership's five-instrument development sequence for executive leaders.

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Executive summary

Leaders plan their organizations quarterly and their lives almost never. The annual goal, set in January's optimism, decays without a review loop; the urgent quarter consumes the important year; achievement in one domain is quietly purchased with neglect in three others. This white paper presents the two instruments at the centre of Infinitum Leadership's Choose Becoming program — the **Quarterly Snapshot**, which reads a leader's whole life across twelve areas, and **The Becoming Plan**, which converts that read into a single 90-day commitment with the structure to survive contact with real weeks.

The instruments are the author's own, and their distinctive features are his. The Snapshot reads twelve areas of a life. Community, Consciousness, and Habits stand as named areas in their own right because coaching clients most often leave service, attention, and daily practice unexamined, and relationships are read at the resolution leaders actually live them — Partner, Family, Friendships, and Community. The Plan carries a Candor clause that coach and client both sign, requires every promise to be written in a worst-week version sized to survive the quarter's hardest week, and tests each focus area with a two-point question — if this area rose two points, what would be different, and who would notice first? A reader running a well-made paper planner on the same cadence may fairly ask what these instruments add. The answer is the coaching: the read is whole-life and reviewed with a coach, the commitment is co-designed in session, and the review loop closes with another person in the room.

The method is the author's own practice — how he reviews his year, builds his life, and stays on track with goals and healthy rhythms — built over years of personal use and client work. Section 3 states its provenance and the scholarly anchors each element stands on: the mechanisms the instruments use (specific and difficult goals, implementation intentions, recorded and reported progress monitoring, behaviour-focused feedback) are each anchored in the peer-reviewed literature and the standard organization-development textbooks, with effect sizes quoted alongside their corrections and limits. The instruments ask little of the leader who uses them: two minutes for a pulse, an honest hour a quarter, fifteen minutes a week.

The paper describes both instruments from their actual forms, justifies each design decision a reviewer would question — gut ratings and short phrases, 1–10 scales used ipsatively, a quarterly cadence, focus routing by declared focus rather than by score thresholds — and states plainly what the evidence does not show. The instruments are evidence-informed in their design. Their outcome record is the program's own, reported as it accrues.

Evidence at a glance

Mechanism the instruments use	Headline effect	Governing caveat
Specific, difficult goals	Difficulty effects of d = .52–.82 across the goal-setting literature	Effects depend on commitment, feedback, ability, and task complexity
Progress monitoring, recorded and reported	d+ = 0.40 across 138 randomized studies	Mostly single goals over shorter periods; the paper claims the mechanism
Structured after-action review	d = .67–0.79; a further estimate of 0.92 is uncorrected	Team task samples; transfer to a whole-life review runs by mechanism
If–then plans, within mental contrasting (MCII)	d = .65 in the original synthesis, ≈ .27 corrected; MCII g = 0.336	Corrected figures govern; guided delivery outperforms document-only delivery
Coaching as the delivery vehicle	g = 0.59 restricted to randomized trials	Publication bias detected; self-reported outcomes exceed observed ones
Recovery experiences	Detachment reduces fatigue; relaxation and mastery predict job outcomes	Detachment alone does not improve job outcomes; recovery protects health and capacity

1. The why: a life reviewed quarterly

This section is written in the first person, because the method began as one leader's practice.

I review my life the way a good executive reviews a business: on a cadence, in writing, against the whole picture. Every Sunday I sit with a weekly review I have refined page by page over years of use. Every quarter I take stock across the whole of my life — health, marriage, family, work, money, spirit — before I commit the next ninety days. Every year I complete the past year honestly before I design the next one.

The architecture is one I built for myself, and then kept. The annual frame is plain: believe the possibility; complete the past before designing the future; find the why underneath the goals; then make it happen in the weeks as they actually arrive. The discipline underneath is a conviction I practise: productivity exists to produce freedom — freedom to focus, to be present, to be spontaneous, to rest — and a week is something you design before it designs you. I have practised this for years, through a presidency, a coaching practice, a family, and a training life. It works because it is a rhythm, and rhythms survive what resolutions cannot.

Shared with clients, the same rhythm has helped hundreds of leaders lead more purposefully. The pattern I kept seeing in coaching was leaders performing a life — competent, applauded, quietly unexamined — while the domains that make leadership sustainable eroded offstage. The Quarterly Snapshot and The Becoming Plan are the instruments I built to give clients the rhythm I use: look first, honestly and across the whole life; then commit, to one thing, with a structure worthy of the commitment. That is the whole method, and it carries the conviction of my practice: end performing, choose becoming.

2. The problem

Three features of executive life make an instrument like this necessary.

Planning asymmetry. Organizations receive quarterly planning, monthly reviews, and weekly operating rhythms as a matter of course. The leader's own life — the asset every one of those plans depends on — typically receives a January intention and no review structure at all. Goal-setting research has known for decades that goals without feedback and review underperform goals with them (Locke and Latham, 2002); the asymmetry means leaders routinely deny their own goals the conditions they would insist on for any business objective.

Decay without monitoring. The strongest available evidence on monitoring itself is direct: across 138 randomized studies with nearly twenty thousand participants, interventions that prompted people to monitor their progress improved goal attainment, and the effect grew when progress was physically recorded and reported to others (Harkin et al., 2016). Annual intentions fail at exactly this point. Nothing is recorded, nothing is reported, and the goal dissolves into the quarter's urgencies.

Single-domain distortion. Goal setting pursued aggressively in one domain distorts the rest — the documented side effects include narrowed focus and the crowding out of un-goaled goods (Ordóñez et al., 2009; a critique its targets answered in the same journal issue: Locke and Latham, 2009). A leader can hit every vocational target in a year and lose the marriage, the health, and the inner life that made the targets worth hitting. Any whole-life instrument must read every domain before it sets a goal in any of them. That ordering is a design requirement, and it shapes everything in Section 4.

3. Provenance: a practitioner's architecture, and its scholarly anchors

The Quarterly Snapshot and The Becoming Plan are the author's own instruments. They were built across his own annual and quarterly review practice and refined in client work over years; no part of them is licensed, franchised, or adapted under another name. Provenance, for this paper, is therefore a question of evidence: where does each element of the architecture stand in the research literature and in the standard organization-development textbooks? This section answers that question element by element, and Section 6 then audits each mechanism against the literature in full.

A completion review. The practice runs on a review before it runs on goals: the annual cycle completes the past year — what was intended, what happened, what was learned, what changes — before it designs the next one, and each quarter closes the same way, with a keep / improve / start / stop review at its turn. That device is adapted from military after-action practice, and it is introduced by its evidence: structured debriefs and after-action reviews are among the most consistently supported practices in the performance literature, with three meta-analyses behind them (Tannenbaum and Cerasoli, 2013; Keiser and Arthur, 2021, 2022) and a further finding that reviewing successes alongside failures improves subsequent learning (Ellis and Davidi, 2005). Section 6 states the effect sizes and the transfer qualification.

A goal checklist. Goals in the Plan are written against a plain-language checklist — Specific, Measurable, Actionable, Risky, Time-keyed, Exciting, Relevant. The checklist's lineage is the management literature: the mnemonic for framing objectives entered that literature with Doran (1981), whose original letters were Specific, Measurable, Assignable, Realistic, and Time-related, and the checklist used here keeps the mnemonic's function while setting its letters by the evidence. Its warrant is the research program behind it — goal-setting theory (Locke and Latham, 2002, 2019). A standing note applies throughout this paper: the checklist operationalizes the conditions that theory has validated — specificity, difficulty, commitment, feedback — and it carries no validation as a framework in its own right. Section 6 grades the checklist's letters against the theory, letter by letter.

A whole-life read. The Snapshot's twelve areas stand on three scholarly foundations. Adult-development theory treats a life as a *life structure* — the underlying pattern of relationships, occupations, and commitments a person has built at a given time — and development as the periodic examination and rebuilding of that structure (Levinson, 1978); a quarterly review of the whole structure is that theory turned into a practice rhythm. The work–life literature supplies the interaction evidence: the domains of a life are distinct worlds that nevertheless influence each other continuously, crossed and recrossed daily (Clark, 2000), and balance across roles is itself defined and studied as engagement and satisfaction across those roles (Greenhaus, Collins and Shaw, 2003). The leadership textbooks carry the same position into development practice. Yukl and Gardner (2020) ground leader development in structured self-examination — a personal vision, self-monitoring, feedback-seeking, and learning from experience — with feedback paired explicitly to goal setting and follow-up. Kouzes and Posner (2023) make clarified values the first discipline of exemplary leadership and the celebration of progress a named practice. Northouse (2025), presenting George's account of authentic leadership, counts an *integrated life* among its constitutive elements. The twelve areas are the author's set, assembled from that ground: Career, Physical Health, Mental Health, Partner, Family, Friendships, Rest & Recreation, Financial, Community, Consciousness, Habits, Spiritual.

A work-sorting device. The practice sorts a leader's current work by passion and proficiency into zones to expand, hold, delegate, or drop, so that the Plan's single commitment is made against an honest picture of where the leader's hours actually go. The device is the practice's own, and it is named here as what it is: a practitioner sorting tool with no published validation, kept because practitioners find it useful and labelled accordingly wherever this paper mentions it. Its neighbours in the literature are real — attention residue (Section 6) prices the fragmented week the sort is meant to repair — and the paper claims the mechanism, while the device carries only practice warrant.

A weekly design template, the Ideal Week. The week's shape is designed in advance, with rejuvenation built in as a system component rather than left to whatever time remains. The template itself is untested; its supporting mechanisms — attention residue, and the ready-to-resume plan that reduces it — are peer-reviewed, and Section 6 claims the mechanisms and leaves the template as a template.

The Snapshot and the Plan run the cadence these elements imply — annual goals, a quarterly read and a quarterly commitment, a weekly review with its Big 3, a Daily Big 3 — with the author's Sunday Weekly Review as the gear that meshes the quarter to the week.

Standing of the practice. Infinitum Leadership is an independent practice, and the Quarterly Snapshot and The Becoming Plan are the author's own instruments, built as this section states.

4. The instruments

4.1 The Quarterly Snapshot

The Snapshot opens with its instruction: *"You can't lead well from a life you haven't looked at. Rate on gut instinct; your first number is usually the honest one. Short phrases, not essays."*

Its components, in order: a **vision prompt** ("A year from now, flourishing" — an ordinary Tuesday, described); a **Well-Being Pulse** of five 1–10 ratings (sleep quality, energy through the day, calm under pressure, connection with people who matter, sense of purpose) headed *"This is the trend line we watch together"*; **twelve areas** — Career, Physical Health, Mental Health, Partner, Family, Friendships, Rest & Recreation, Financial, Community, Consciousness, Habits, Spiritual — each with a gut rating from 1 to 10, a "what's going well," and a "what's neglected," and a marker for one or two focus areas for the coming quarter. The twelve areas are the author's set, assembled on the ground Section 3 lays out. Community, Consciousness, and Habits stand as named areas because they carry goods — service, attention, daily practice — that coaching clients most often leave unexamined, and relationships are read as four areas (Partner, Family, Friendships, Community) rather than one, at the resolution leaders actually live them.

Marking a focus area opens its **deep-dive**: what flourishing would look like in a normal week, what is already working, what this area is costing the rest of the life, what has been avoided, and a two-point test — if this area rose two points this quarter, what would be different, and who would notice first. The quarter closes with **four questions, every quarter** — what went well, what was neglected, what's next in one or two achievable steps, and who's with you — plus two the annual reviews inspired: what are you celebrating, and have you actually celebrated it; who contributed to your progress, and have they heard it from you.

4.2 The Becoming Plan

The Plan is a 90-day instrument organized by The Becoming Method, with its start date and 90-day review date fixed on day one. **Clarity** names the single measurable goal worth pursuing this quarter, interrogated by "Why this, why now" and "What success looks like." **Courage** names the stretch and the obstacle — located honestly "in your schedule, your habits, or your own thinking" — and answers it with an if-then plan: "When that obstacle shows up, I will…" A **Scale It** section rates importance and confidence from 1 to 10 and asks what would raise confidence by one point. **Commitment** records three specific promises and the worst-week version — the smallest form of those promises that survives the quarter's worst week. **Character** closes the goal work with the destination the rest serves: "In 90 days, the leader I am becoming is…" Milestones at day 30, 60, and 90 supply the quarter's feedback points. A **Consistency** layer keeps the plan alive between reviews — a daily practice, an evening check, a fifteen-minute weekly review, and weekly measures the client chooses and tracks. Vision horizons (one year, three years, ten years), a Support section naming the people, books, practices, and restoration the plan depends on — ending in a specific support ask — and an Ideal Week template complete the document. The Plan is co-designed with the coach

and carries a Candor clause both parties sign: *"My coach will tell me the truth, kindly and directly. I will bring honesty, not performance."*

4.3 How the Snapshot feeds the Plan

The feed is structural. The Snapshot's focus markers and "What's next?" steps generate the candidate priorities; the Plan's Clarity section forces one selection and tests it against its why; the Snapshot's "Who's with you?" returns operationalized in the Plan's Support section; and the Plan's review date, set at its creation, schedules the next Snapshot. Each quarter's read is made from inside the previous quarter's commitment, and each commitment is made from a fresh read. The loop is closed by the forms themselves.

5. Methodology justification

Two instruments, sequenced. Diagnosis precedes prescription: commitment made from a current whole-life read is the kind of commitment goal-setting theory requires, since commitment moderates goal effects (Locke and Latham, 2002). The sequence also mirrors the architecture's own order — complete the past, then design the future, then settle the why.

Gut ratings and short phrases. Three reasons. Burden: a twelve-area review that demands essays will not survive four repetitions a year, and the monitoring evidence rewards frequency and recording (Harkin et al., 2016). Candour: prompts ask about conditions and behaviours — what is going well, what is neglected — rather than verdicts on the self; feedback research shows why that matters (Section 6). Interpretability: every number arrives flanked by a strength and a neglect in the client's own words, so a rating stays information a coach can work with. One honesty note on the Snapshot's own wording: its instruction that the first number is "usually the honest one" is a design instruction, offered so the rating outruns self-editing. This paper advances no claim that first responses are demonstrably more accurate; the instruction's warrant is the burden and candour rationale above.

1–10 scales, used ipsatively. The instruments assert no population norms and permit no comparison between people. A score's meaning is the same person's score last quarter; the Well-Being Pulse is explicit that the trend line is the unit of analysis. The Pulse's five items form a deliberately small vital-signs set, repeated identically each quarter so change is readable. Two defences of the Pulse's design belong here. A validated five-item well-being instrument exists — the WHO-5, with a systematic review behind it (Topp et al., 2015) — and a reader may ask why the Pulse keeps its own five items. The answer is deliberate scope: the Pulse tracks the five conditions a coaching conversation in this program actually works on (sleep, energy, calm, connection, purpose), a domain set the WHO-5 only partly overlaps, and it is framed throughout as a conversation tool carrying no screening or clinical function. Adopting a validated well-being index would import screening expectations and duties the program has deliberately declined; the Pulse accepts the cost of that choice, which is that its items carry no external validation. Second, single-item ipsative trends carry measurement error: a two-point move on one gut-rated item between quarters is partly noise, and the program reads Pulse movement alongside the client's own words in the areas, never as signal standing alone. The Snapshot is a coaching instrument; Section 7 states its permitted and excluded uses.

The 90-day cadence. The quarter is defended on its merits: long enough for a habit to take hold — the formation literature's timescales place a quarter inside the window in which a deliberately practised behaviour can become substantially automatic, with a median of 66 days to near-complete automaticity and an individual range of 18–254 days in the foundational study (Lally et al., 2010), and medians of 59–66 days with a range of 4–335 days across the current systematic review (Singh et al., 2024) — and for an achievement goal to complete a meaningful arc; short enough that a failing course is caught while correction is still cheap; sustainable at four cycles a year, where a weekly whole-life re-read would collapse under its own weight while weekly reviews maintain the thread. The cadence also draws on a verified initiation effect: aspirational behaviour rises after temporal landmarks — new years, new quarters, birthdays — because landmarks create psychological distance from the past self and open a fresh mental-accounting period (Dai, Milkman and Riis, 2014, 2015). That evidence supports starting at a boundary; it says nothing about persisting, no study has compared review cadences against one another, and the paper claims the landmark effect for initiation only. The annual layer remains the design horizon — the Snapshot's one-year flourishing picture and the Plan's one-, three-, and ten-year vision fields nest the quarter inside the year.

Focus routing without score thresholds. Breadth first (all twelve areas, every quarter, so neglect cannot hide), then forced narrowing to one or two focus areas, then depth only where focus is declared. Routing runs on declared focus and on movement in the trend, exercised with the coach. The v2 forms contain no numeric banding thresholds, and this paper claims none; should formal banding be adopted later, it will be published as a design amendment rather than read back into the current instruments.

Each Plan device, defended. The named obstacle makes commitment specific under difficulty, the condition goal effects depend on. The if–then plan placed beside it is a direct implementation intention (Gollwitzer, 1999). Taken together — a vivid destination, a named obstacle, an if–then answer — the Courage sequence is the combination the literature calls mental contrasting with implementation intentions; Section 6 gives its evidence. Scale It surfaces low confidence while redesign is still possible — "what would raise your confidence by one point?" is a design question, and the worst-week version sizes promises to survive the quarter as lived. The 30/60/90 milestones supply the feedback that goal-setting theory names as a condition of its own effects. Character stands last in the writing and first in the logic: identity appears as the destination organizing the work, held steady while the weekly reviews attend to behaviour.

6. The scholarly spine

Goal-setting theory. Across thirty-five years of laboratory and field research, specific and difficult goals reliably outperform easy goals and "do your best," with difficulty effects in the meta-analyses Locke and Latham (2002) review ranging from d = .52 to .82, operating through attention, effort, persistence, and strategy. The theory's current canonical statement (Locke and Latham, 2019) names five moderators: commitment, feedback, task complexity, ability, and situational constraints. The goal checklist's criteria enter here at their graded weight: the specific, measurable, and time-keyed letters restate the theory's core; "Risky" restates its difficulty effect, with the theory's boundary conditions attached; "Exciting" and "Relevant" correspond to the commitment

moderator and to the autonomous-motivation literature — a correspondence at the level of the letters, since no study tests them, resting on a literature that carries direct evidence of its own. Self-determination theory's current workplace statement holds that goals pursued for autonomous reasons, because they are valued or enjoyed, sustain effort and well-being better than goals pursued under pressure (Deci, Olafsen and Ryan, 2017). The theory's goal-level form is the self-concordance model: people pursuing goals aligned with their intrinsic and identified reasons expend more sustained effort, attain more of those goals, and gain more well-being from attaining them (Sheldon and Elliot, 1999). Self-concordance is the scholarly form of the why-interrogation the method builds in — the question the Plan's Clarity section puts to every goal: why this, why now. The instruments are built to the theory's conditions: one specific goal, its why recorded, feedback points built in, commitment made explicit and signed.

Implementation intentions. If–then plans delegate behaviour to a pre-chosen cue. Gollwitzer and Sheeran (2006) found a medium-to-large benefit across 94 tests (d = .65); the same team's later, larger update reports a smaller effect for behaviour change specifically (around d = .27, with bias-corrected estimates lower still). This paper quotes both figures together, as any honest account must. Even at the corrected size, if–then planning remains among the cheapest well-replicated devices in the goal literature, which is why it sits at the Plan's centre.

Mental contrasting: the Courage sequence, named. The Plan's Courage movement pairs the if–then plan with two elements an implementation intention alone does not include: a vividly imagined destination and an honestly named obstacle standing in front of it. That combination is mental contrasting with implementation intentions (MCII), and it carries its own synthesis. Across the meta-analysed studies, MCII improved goal attainment at g = 0.336, falling to 0.242 after correction for publication bias (Wang, Wang and Gai, 2021); a companion synthesis in health behaviour reaches consistent conclusions (Cross and Sheffield, 2019). The finding this paper most wants on the record is the delivery moderator inside that analysis: experimenter-led delivery produced g = 0.465, against g = 0.277 for document-based delivery. Guided delivery outperformed document-only delivery by a wide margin — the strongest evidence in this literature that the Plan's sequence belongs inside a coaching relationship, which is why the Plan is co-designed in session.

Progress monitoring. Harkin et al. (2016), across 138 randomized studies (N = 19,951), found that prompting progress monitoring improved attainment (d+ = 0.40), with larger effects when progress was physically recorded and reported to others. The Snapshot/Plan architecture — recurring, written, reviewed with a coach — is this finding given a form. The honest ceiling also applies: the meta-analysis covers mostly single goals over shorter periods, so the paper claims the mechanism, recorded and reported recurring review, rather than a proven effect for this exact instrument.

Structured review: the After-Action Review evidence. The practice's review steps — completing the past in the annual cycle, the keep / improve / start / stop review at each quarter's turn — adapt the After-Action Review from military practice, and that device now carries direct meta-analytic support. Debriefs improve effectiveness by roughly 20–25% over control conditions (d = .67 across 46 samples, N = 2,136), with structured, facilitated, developmental debriefs drawing on multiple information sources performing best (Tannenbaum and Cerasoli, 2013). A larger meta-analysis found d = 0.79 across 61 studies, with alignment to the individual or team and the use of objective performance information among the contributors to effectiveness (Keiser and Arthur,

2021). An extension across 83 studies reports d = 0.92 overall — a bare-bones, uncorrected estimate, quoted here as such — and finds the largest effects in high-complexity, high-ambiguity task environments: project and decision-making work, the executive's native terrain (Keiser and Arthur, 2022). Reviewing successes alongside failures improves subsequent learning more than failure-only review (Ellis and Davidi, 2005), which is why the Snapshot's closing questions ask after accomplishments and celebrations as deliberately as after disappointments. One qualification travels with the numbers: the underlying samples are military, medical, aviation, and education teams reviewing defined tasks, so the transfer to an individual's quarterly life review runs by mechanism — structured, written, multi-source review of a defined period, worked with a coach — rather than by direct test. The Snapshot's format matches the features those meta-analyses identify: structured, developmental, specific-period focused, and drawing on recorded information rather than recollection alone.

Feedback, with its caution. Kluger and DeNisi (1996) found feedback interventions improved performance on average (d = .41) while more than a third of them decreased it; their theory locates the difference in attention — feedback helps when it points at the task and harms when it points at the self. The instruments are designed under that discipline: reviews attend to areas, behaviours, and next steps; the Candor clause frames the coaching conversation as honesty rather than performance; identity appears as destination, never as the reviewed object.

Habit goals and daily practice. The annual design mixes achievement goals with habit goals, the Snapshot carries a Habits area, and the Plan's Consistency layer is a daily-practice design — so the habit claims deserve their own anchoring. Most clients arrive with the popular account in Clear's *Atomic Habits* (2019); this paper acknowledges Clear as the popular source and rests every load-bearing sentence on the scholarly record instead. Habits, properly defined, are behaviours triggered automatically by contextual cues associated with past performance; they form through repetition in a stable context and persist after motivation fades (Gardner, 2015; Wood and Rünger, 2016). The foundational formation study found automaticity growing with context-stable repetition to a median of 66 days, with an individual range of 18–254 days, and found that a single missed occasion did not materially affect formation — a miss is survivable, and the program claims no streak rules (Lally et al., 2010). The field's practice guidance agrees: repeat a chosen behaviour in the same context until it becomes automatic, and anchor new behaviours to existing routines and cues (Gardner, Lally and Wardle, 2012; Lally and Gardner, 2013). The current systematic review and meta-analysis reports medians of 59–66 days, means of 106–154 days, and an individual range of 4–335 days, with 11 of its 20 studies at high risk of bias and stronger formation for self-chosen and morning-anchored habits (Singh et al., 2024). Two consequences follow for the program's language. Any single formation number must travel with its range; no fixed number of days forms a habit, and figures circulating in popular habit writing appear in none of this literature. And where the program needs a scholarly grammar for its techniques — goal setting, action planning, prompts and cues, self-monitoring, habit formation as a named technique — it uses the field's consensus references: the Behaviour Change Wheel and its COM-B model (Michie, van Stralen and West, 2011) and the 93–technique Behaviour Change Technique Taxonomy (Michie et al., 2013). One popular claim is excluded by design. Clear's identity framing — each action a vote for the type of person one wishes to become — is the program's philosophy, stated as such in Section 5, and no study tests identity framing as a mechanism of habit formation; the nearest verified support runs in the opposite causal direction, with people inferring their intentions and identity from the frequency of

their habitual behaviour (Wood and Rünger, 2016). His compounding figure — one per cent better daily — is arithmetic inside a metaphor, and this paper does not present it as a finding.

Attention residue: why the week gets designed. The Plan's Ideal Week template, and the shutdown and re-entry habits the Consistency layer teaches, rest on a named mechanism rather than on a template's reputation. After a person switches away from an unfinished task, part of their attention remains with it, and performance on the next task suffers — the attention residue effect (Leroy, 2009). A brief ready-to-resume plan made before switching substantially reduces that residue (Leroy and Glomb, 2018). The mechanism is peer-reviewed and it supports protecting designated work and planning re-entry; The Ideal Week template as such has never been tested, and the paper claims the mechanism rather than the template.

Recovery, stated at its true size. The Well-Being Pulse, the restoration named in the Plan's Support section, and the rejuvenation the architecture builds in as a system component draw on the recovery literature, which supports a real and narrower claim than practitioner energy language usually makes. The Recovery Experience Questionnaire validates four recovery experiences: psychological detachment, relaxation, mastery, and control (Sonnentag and Fritz, 2007). Meta-analytically, detachment is the recovery experience most strongly related — negatively — to fatigue, and control is the experience most strongly related to vigour (Bennett, Bakker and Field, 2018); across 86 publications, detachment relates positively to health, well-being, and, at small-to-medium size, task performance (Wendsche and Lohmann-Haislah, 2017). The qualification is mandatory and stands in the same breath: in the largest synthesis to date (316 studies, N = 99,329), relaxation and mastery predict job outcomes, while detachment improves personal outcomes without itself benefiting job outcomes (Headrick et al., 2023). The claim this paper therefore makes is the supported one: recovery is evidence-based protection for the leader's health and capacity. It is not a proven direct performance lever, and no energy-management slogan is asked to carry more than that.

The delivery vehicle: coaching itself. The Plan is co-designed with a coach, and that arrangement carries its own evidence rather than resting on custom. Across 18 studies, coaching produced significant effects on all five outcome classes examined, largest on goal-directed self-regulation ($g = 0.74$), then performance and skills (0.60), work attitudes (0.54), well-being (0.46), and coping (0.43) (Theeboom, Beersma and van Vianen, 2014). Restricted to randomized controlled trials only — 37 trials, N = 2,528 — coaching's overall effect is $g = 0.59$, with publication bias detected and effects larger for self-reported than for observed outcomes (de Haan and Nilsson, 2023). That is the honest warrant for housing these instruments inside a coaching relationship: the recorded and reported review the monitoring evidence rewards happens, in this program, with a coach. Two further results complete the coaching record, and this paper reports both at full size. A workplace-specific meta-analysis found a smaller overall effect ($\delta \approx 0.36$ across learning and performance outcomes) and, within it, larger effects for internal coaches than for external coaches ($\delta = 0.70$ vs 0.49) (Jones, Woods and Guillaume, 2016). An external practitioner has no honest way to omit that moderator, so it stands here in plain view. Its bearing on this paper's offer turns on which comparison applies: the same analysis reports its largest effect for individual results ($\delta = 1.24$), and individual executive work is the engagement these instruments serve. What determines whether coaching works, beyond its average effect, is also studied: a systematic review of coaching effectiveness identifies the working relationship, trust, and the quality of feedback among its

determinants (Bozer and Jones, 2018) — the scholarly neighbours of the Candor clause the Plan asks both parties to sign.

Two further anchors are cited as correspondences. The Plan's importance and confidence rulers correspond to the motivational interviewing tradition (Miller and Rollnick, 2013), offered as a design observation. The construct the confidence ruler engages carries its own canonical name: self-efficacy, a person's belief in their capacity to carry out what a goal requires (Bandura, 1997); asking what would raise confidence by one point is a self-efficacy question, and Scale It works on that construct. The critique of over-prescribed goal setting (Ordóñez et al., 2009; answered in the same journal issue by Locke and Latham, 2009) is answered structurally by the twelve-area read and by the deep-dive's costing question — what is this area costing the rest of your life right now — which builds the critique into the instrument itself.

7. What the evidence does not show

The practice's own devices — the goal checklist and the work-sorting tool — have no published psychometric validation as frameworks, and this paper claims none for them. Energy claims in their slogan form exceed the record; Section 6 states the recovery evidence at its supported size — protection for the leader's health and capacity, with detachment alone shown not to improve job outcomes. The After-Action Review evidence is drawn from team task reviews, and its application to a whole-life quarterly review is a transfer by mechanism, stated as such where the numbers appear. The peer-reviewed effects transfer as mechanisms; their magnitudes were earned on defined tasks and single goals, largely in occupational and health samples, and do not transfer silently to whole-life coaching outcomes. The Snapshot's ratings are single-item, self-anchored self-report — defensible for low-burden repeated monitoring inside a coaching relationship, and excluded from selection, benchmarking between people, and any high-stakes decision. The quarterly cadence is a reasoned design choice defended in Section 5, and no trial compares review cadences for instruments of this kind. The claim that the method has helped hundreds of leaders is the author's practice claim, attributed to his practice. What this paper claims, in full: the instruments are carefully designed, their provenance is the author's own practice, and they are built from mechanisms the evidence supports. Outcome evaluation of the instruments themselves is the program's continuing work, and its results will be reported as they accrue.

8. The practice in use

Inside Choose Becoming, the pair runs as a rhythm: a Snapshot opens each quarter, a Plan is co-designed from it in session, the client works the Consistency layer daily and weekly — the Sunday Weekly Review among the tools offered — and the 90-day review date set on day one brings the client back to a fresh Snapshot. What the rhythm returns is the thing performing leaders most lack — a life that has been looked at, and a commitment made from the looking.

Sponsored use and data boundaries. Where an organization sponsors an executive's program, the reporting terms are agreed in writing with the client before the engagement begins, and they are narrow. The sponsor receives the program's structure — the instruments, the cadence, the session schedule — and confirmation that the executive is participating. Where a sponsored cohort is large

enough for aggregation to protect individuals, the sponsor may also receive cohort-level trend reporting; the program sets that floor at ten participants, and no trend is reported below it. The sponsor never receives an individual's Snapshot ratings, area scores, Well-Being Pulse values, or Plan contents. Two areas of the Snapshot carry an additional protection: Spiritual and Consciousness are self-rated, entirely voluntary, and may be left blank without explanation, and they are excluded from every form of reporting. The Well-Being Pulse serves as a coaching conversation tool and carries no screening or clinical function; if a client's pulse stays persistently low, the program's response is a referral conversation with the client about appropriate professional support. The client's material remains the client's, in sponsored and self-funded work alike.

Governance. The practice behind the instruments is a solo practice, and this paper prices that honestly. The author practises under the ICF Code of Ethics, holds the credentials in the byline (MA, PCC, MCS), and works under regular professional supervision. Solo practice is a confidentiality asset in one-to-one executive work: exactly one person holds the client's material, with no team or associate coach holding access to it. The corresponding risk is continuity: if the practitioner is unavailable for an extended period, engagements pause for the duration, with no substitute coach taking over the work, and the client's instruments and records remain in the client's hands throughout.

Three routes in. Self-funded executives ask about fit and confidentiality, and both are answered in a discovery call before any commitment. Organizations sponsoring an individual executive ask about reporting, and receive the boundaries set out above. Organizations considering a cohort ask about consistency of delivery across participants; the instruments, the cadence, and the reporting floor are identical for every participant, and cohort reporting is aggregate-only under the same floor.

The next step. Book a discovery call, and complete a sample Snapshot beforehand — an honest hour with the actual form, so the call works from the client's own twelve areas. The quarter a leader is currently living is the only starting material the method needs.

End performing. Choose becoming.

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