

# The Yourell Self-Planner: "Getting There from Here"

V.1.1

Dear Counselor, Coach or Case Manager,

This self-planner has twenty-three questions covering seven topics that run your client through a valuable self-assessment. It is a common-sense and clinically-grounded approach that can accommodate a basic or extensive investment by the client.

**Purpose:** *Getting There from Here* leads the client through a process that can better prepare them for intervention and for an effective dialogue with helping professionals. The result is also a plan, or valuable plan components, directly tied to the client's needs and perceptions. As such, it can assist the counselor in maintaining rapport with the client. (If you frame your recommendations in terms of the client's perceptions, you will side step one of the most common causes of harm to a counseling relationship by helping the client perceive you as being *relevant and capable of acting in their interest*.) Coaches can also use this form, or its format, to assist clients in their pursuit of excellence.

**Client Ability Level:** If your client would have trouble completing *Getting There from Here* on their own, you should take them through it with support and dialogue. This way, you will not only get assessment information, but the client will receive initial counseling with the structure of the *Getting There from Here* process. This can help the initial assessment and counseling work together well, and be more thorough and relevant.

**Integration with *the Yourell Plan Format for Counseling and Case Management*:** Note that the items correspond directly to the beginning of the *Yourell Plan Format*, a structure for initial assessment for counseling or case management. . The information that comes with the *Yourell Plan Format* explains how these two items can work together to improve assessment, counseling, and client readiness for intervention and dialogue.

**Tips:** The clinician should complete this form before using it, in order to better understand its use, and because it can benefit even exceptionally high-functioning persons who haven't the slightest mental problem. This form works well with motivational interviewing, and clarifies themes and directions for the Shimmer Method that I feature at Yourell.com.

**No Warranty:** Of course, this document is provided as is, with no warranty. It is up to you in your professional, clinical judgement to determine whether or how to use or modify it.

**I welcome suggestions:** I'm always eager to refine these materials. Send any modifications you make.

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I hope you find this helpful.

- Bob Yourell

## **Getting There from Here**

**Instructions:** Use a separate piece of paper. Answer the questions, numbering them to match this page. It helps to add the bold keyword at the beginning of each question.

### **Limitations**

**1. Limits:** How is your functioning limited and why?

### **Distress**

**2. Discomfort:** What discomfort have you been experiencing. (Concern, emotion, stress, physical, or any other areas.)

**3. Meaning:** What does this mean to you?

### **Desires**

**4. Desire:** How would you like to see this resolved and what do you really feel is possible from here?

**5. Hope:** What do you see as the highest potential of this situation and yourself?

### **You**

**6. You:** What are your capacities and strengths that can help you (directly or indirectly) with this? (Skills, talents, gifts, resolve, life experience, or any other kind.)

**7. About You:** What things about you can help or hinder you in using or expressing those capacities and strengths? (Uncertainty, confusion, will power, values, or anything.)

### **Resources**

**8. Help:** Who and what should be able to help you with this? (Your people, professionals, organizations, opportunities, circumstances, or anything else.)

**9. Access:** What may help or hinder these resources in helping you?

### **Second Look**

**10. So what?** What does all this add up to at this point?

**11. Reality Check:** How realistic, complete and useful is your perspective here?

**12. Forces:** What has helped or hindered your ability to analyze this?

**13. Therefore:** What should happen to improve your ability?

### **Ideas**

**14. Your plan?** What has your plan (or way of handling it) been for this, lately?

**15. Your efforts?** What have you done about it lately?

**16. Evolution:** How have your plans and efforts changed over time and why?

**17. Your results?** How effective have your plans and efforts been, and why? (How has this changed over time or chapters in your life.)

**18. Forces Inside:** What is it about you that has helped and hindered your planning and efforts? (Stress, other priorities, chaos, advice, problem-solving style.)

**19. Forces Outside:** What people, or situations have helped or hindered you?

**20. Therefore:** What needs to happen in order to make your plans and efforts more effective in resolving this?

**21. Lemonade:** How well have you been able to take advantage of situations that were mainly just obstacles or challenges? (Finding detours, opportunities, ideas, etc.)

**22. Lemon-Now:** What situations are in your way now?

**23. Now-Aid:** What kind of thinking or actions might help you benefit from them?

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Name: \_\_\_\_\_

Date:    /    /