

Upgrade Program Values Plan

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Introduction

This document is part of a series of upgrade plans for every [area](#) of your life. It's broadly designed for a single, middle-class, 30-something living in a major city in a developed country.

Please go to "File" > "Make a copy" and make a copy of it for yourself. Then fill it out section by section according to your particular needs and circumstances. Perhaps add sections or items, delete them, change the order, and so on.

Your aim should be to make the plan as applicable and useful to you as possible. You should not follow the plan blindly—think it through for yourself.

Note that this process might be challenging. You might need to teach yourself things you aren't very knowledgeable about yet. You might feel like you need to do preliminary work in a different life area first. That's okay. Figure out broadly what makes sense for you, operationalize that understanding as specific actions in the [Actions](#) section, and then do them.

If it feels overwhelming, just start with the parts you find most valuable and do what you can. Tackle the rest over time. It may also help to set aside a dedicated [day](#) to work exclusively on this by yourself or with friends. Or you may choose to enlist an [UP Coach](#) to co-design and execute this plan alongside you.

Epistemic Status

This is an overview of how confident the principal [author](#) is in this plan.

- Generally high confidence in this plan
- Based on 30+ years of experience of personal work, 100+ hours of research on personal values, and 30+ years of coaching and mentoring 100+ people on identifying their values

Objectives

Decide what objectives you have with this plan and rank them in order of importance. Below are a few sample objectives.

1. Develop comprehensive map of personal values that's appropriately organized and ranked
2. Live in accordance with personal values as much as possible
 - a. Identify and eliminate [value-action gaps](#)

Metrics

Decide what metrics you will use to evaluate the effectiveness of this plan. Also include the frequency in which you'll evaluate those metrics. For example, ad hoc, once, hourly, daily, weekly, monthly, quarterly, annually or per decade. Below are some sample metrics.

- Values Rating: How would you rate your values, on a 1-10 scale?

Values

List all of your relevant values and rank them in order of importance. Below are some sample values.

1. Life congruence
2. Self-awareness
3. Comprehensiveness

Value Analysis

List and then analyze all of the costs and benefits of this plan. Potentially also estimate expected value, cost-benefit, return on investment, and/or net present value.

- Time costs: 1 - 1,000 hours
- Financial costs: \$0 - \$50,000 dollars (e.g., coaches, psychotherapists, retreats, travel, drugs, etc.)
- Benefits: \$X in potentially extremely large subjective benefits

Strategies

Decide on your high-level strategies for achieving your objectives. Below are some sample strategies.

Key People

- Do the work on your own
- Outsource some of the work to experts (e.g., moral philosophers, professional ethicists)
- Outsource some of the work to assistants

Key Timings

- Make incremental progress every day until you reach your objectives
- Make as much progress as you can over a set period (e.g., one day, one week or one month)
- Intensively invest resources until you reach your objectives

Actions

List the specific actions you will take to achieve your objectives. You should add these tasks to your project management system unless you are choosing to do them now. Below is a sample sequence of actions you might take.

1. Describe your [mental model](#) of human values
 - a. Create a visual representation of it from memory without referencing this plan or outside sources of information
 - b. Create a new visual representation after thoroughly studying this plan and any relevant sources of information
 - c. Pay special attention to the improvements in the second version as incorporating those new insights may be crucial to the success of your plan
2. Finish every section of this plan, including the [assessments](#), [tools](#), and [resources](#) below
3. Complete [UP Life Audit](#)
4. Complete [UP Self-Model](#)
5. Complete [UP Life Areas Taxonomy Design](#)
6. Explore [UP Assessments](#) and do whichever assessments seem most valuable to you
 - a. Consider all the instruments in [Self](#) (see above)
 - b. Consider all the assessments in [Personality](#)
7. Complete [UP Life Responsibilities](#)
8. Complete [UP Life Dashboard](#)
9. Complete [UP Life Goals](#)
10. Complete [UP Life Paths](#)
11. Complete [UP Life Strategies](#)
12. Complete [UP Life Plan](#)
13. Consider doing intensive psychotherapy (especially [Internal Family Systems Therapy](#))
14. Consider experimenting with psychedelics (under proper medical guidance in jurisdictions where it's legal)
15. Consider doing long meditation retreats
16. Consider experimenting with complete isolation for 1 week to 6 months
17. Consider doing somatic-focused explorations (e.g., somatic therapy, bodywork, yoga, surfing, skiing, etc.)
18. Consider doing “men’s work” or “women’s work” (e.g., [New Warrior Training Adventure](#), men or women’s circles, retreats, etc.)
19. Consider traveling the world to absorb insights from other cultures

Schedule

Decide on which days you will take which actions. You should add these dates to your calendar now.

- [Date]: Finalize plan
- [Dates]: Execute plan
- [Dates]: Review plan's outcomes

Predictions

Predict how well you will do in achieving your objectives.

- [Name]: I predict with [X]% confidence that I will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].

- Combined: We predict with an average [X]% confidence that [Name] will [Y] by [Z].

Outcomes

Objectively record how well you achieved your objectives.

- [Date #1]: [Outcomes]
- [Date #2]: [Outcomes]
- [Date #3]: [Outcomes]
- [Date #4]: [Outcomes]
- [Date #5]: [Outcomes]
- [Date #6]: [Outcomes]
- [Date #7]: [Outcomes]
- [Date #8]: [Outcomes]
- [Date #9]: [Outcomes]
- [Date #10]: [Outcomes]

Assessments

List all of the assessments you might take to understand how you're doing compared to your objectives. Below are some sample assessments.

- [Comprehensive Motive Scale](#): a questionnaire to measure how much you value meaning, communion, and agency
- [Intrinsic Values Test](#): a test to find out what you most value in the world

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- [Fair Market Ideology \(FMI\)](#): an assessment to measure the extent of individuals' belief that the existing free-market system is fair, ethical, and legitimate
- [Portrait Value Questionnaire — Revised \(PVQ-R\)](#): an instrument that measures 19 value types
- [Portrait Values Questionnaire \(PVQ\)](#): an instrument to measure human values
- [Schwartz Value Survey \(SVS\)](#): a self-report questionnaire developed for assessing individual differences in values, with values being defined as desirable, trans-situational goals, varying in importance, that serve as guiding principles in people's lives
- [Valued Living Questionnaire \(VLQ\)](#): an instrument that taps into 10 valued domains of living

Tools

List all of the tools you might use to achieve your objectives. Below are some sample tools.

- [UP Assessments](#)
- [UP Curriculum](#)
- [UP Holistic Life Assessment](#)
- [UP Life Areas Taxonomy Design](#)
- [UP Life Audit](#)
- [UP Life Dashboard](#)
- [UP Life Goals](#)
- [UP Life Paths](#)
- [UP Life Plan](#)
- [UP Life Responsibilities](#)
- [UP Self-Model](#)
- [UP Life Strategies](#)
- [UP Tools Database](#)
- [Upgradable Theory of Optimal Living](#)

Resources

List all of the resources you might use to achieve your objectives. Below are some sample resources.

- [Date With Destiny](#)
- [Hoffman Process](#)
- [New Warrior Training Adventure](#)
- [PSI Seminars](#)
- [Shadow work](#)
- [Spencer Greenberg's List of Human Needs](#)
- [Theory of Basic Human Values](#)
- [Unleash the Power Within](#)

Notes

Add any random thoughts, questions, uncertainties, etc.

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