

Episode 29: MI Consistent Approach to Planning

Lions and Tigers and Bears MI is an interactive podcast focused on motivational interviewing

CASAT Podcast Network Lions and Tigers and Bears MI is brought to you through a collaboration between the Mountain Plains ATTC and NFARtec. In episode 29, Paul and Amy welcome a guest to discuss an MI consistent approach to planning for episode. Resources, links to episodes, contact us, and other information, please visit the Lions and Tigers and bears MI website at mtplainsattc.org/podcast.

Paul Warren: Lions and Tigers and Bears MI an interactive podcast focused on the evidence based practice of motivational interviewing, a method of communication that guides toward behavior change while honoring autonomy.

Amy Shanahan: I'm Amy Shanahan.

Paul Warren: And I'm Paul Warren.

Amy Shanahan: And we've worked together over the past ten years. We've been facilitating MI learning collaboratives and providing trainings and coaching sessions focused on the adoption and refinement of MI. We're also members of the motivational interviewing network of trainers. Join us in this adventure into the forest, where we explore and get curious about what lies behind the curtain of MI. Hey, Paul.

Paul Warren: Hello, Amy. How are you today?

Amy Shanahan: No, I'm happy always to be in the studio with you.

Carol DeFrancesco is a motivational interviewing expert from Oregon

Paul Warren: In the studio.

Amy Shanahan: we have a guest that came all the way from Oregon via Zoom. Yeah.

Paul Warren: To join us in the studio.

Amy Shanahan: I'm so excited, and I would love to do the introduction, but it would be way too long because I have so many wonderful things to say. So I'm going to pass the mic to you, Carol, to say hello and introduce yourself.

Carol DeFrancesco: Well, hi. Great to see you both. I wish we were in the same room together. That would be a lot of fun.

Paul Warren: Me, too.

Carol DeFrancesco: So, I'm Carol DeFrancesco. I've worked with these two for quite a while. I've been involved in motivational interviewing for many years now. More than 25, I think. so I come to motivational interviewing from the healthcare setting, and I was fortunate to get trained by Denise Ernst, and she has been a friend and a mentor for all those years. And I'm so grateful for that. So, because of that, I've done a lot of listening

to audio recordings with mighty coding and miscoding and all that. and then I do some teaching and counseling in health promotion and also research. So. A jack of all trades, master of none. Absolutely.

Amy Shanahan: We're so happy to have you here. What else?

Carol DeFrancesco: What else? What do you mean? I said enough about me.

Amy Shanahan: I, think you're a surfer. You like to surf?

Carol DeFrancesco: Oh, yeah, you know, I am a surfer. And, you know, when I was thinking about our topic today, direction, directional planning, focus, all that stuff, I was thinking how applicable that is to sport as well. And in surfing, one of the instructions is that, look where you want to go. You know, for me, I'm scrambling up on my surfboard, trying to put a million things together in a moment. And it's pretty unwieldy, honestly, to hop up on a moving board, on a moving wave, and then have the presence of mind to look where I want to go on the wave. But it really does make a difference to look, look where you want to go. So that I have this little mantra that I say to myself as I'm paddling for a wave, is to commit to the wave, you know, don't be half assed about it, and then look where I wanna go.

Amy Shanahan: Beautiful.

Paul Warren: It is beautiful. And so relevant because when you said that, Carol, it immediately made me think of driving. Because you need to keep your eyes on the road and look where you're going in order to get to the destination that you'll eventually arrive at. And along that path, probably similar, although I've never been on a wave

other, than body surfing, there are sometimes occurrences, detours, events that can occur, and we can still keep our eye on the direction that we want to go in. And that becomes particularly

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Paul Warren: relevant to the idea of being directional as opposed to directive.

Carol DeFrancesco: Yeah, you know, and it's similar. I was also thinking about horseback riding, how if you're looking, if your eyes are, not down at the ground, but on the horizon, and I. And having a focus of where you want to go, then without even cueing the horse, the horse picks up on that too, and there's a natural movement in that direction.

Amy Shanahan: I love all these analogies.

What do you think about the difference between directive and directional when planning

I'm curious, what do you think about the difference between directive and directional? When I hear people talk about planning and talk about Mi, they get confused about how far off the middle of directional do you go? And my background is, maybe some of the listeners know, is in addiction treatment. And that's been our, pretty much our culture, I would like to say, and I talk about that a lot. The culture eats strategy for breakfast, where we've been directive for many, many decades, telling people what to do, how to do it. And I think I might have just defined directive. What do you think about the

difference?

Paul Warren: I mean, for me, the distinction is critical to the success of the practice of Mi and the success of effectively engaging people. Because I think the minute, being directive comes in, and let me be clear what I mean by that. I mean where myself, in the role of the worker, is telling the person what they should do, what they have to do what is best for them to do. And I haven't asked permission. They haven't asked me for this feedback. It's unsolicited. I'm monologuing, as opposed to dialoguing is probably one of the quickest ways to rupture rapport and possibly create discord in the relationship. And to me, especially when we're talking about planning, it's critical to remain directional and avoid the trap of becoming the fixing reflex director of determining what somebody's plan needs to be.

Carol DeFrancesco: Yeah. And as you're saying that, you know, Amy, you mentioned addictions and how it's easy to get directive.

Amy Shanahan: It's.

Carol DeFrancesco: I see it all the time in healthcare, too. And I have been struck by how simply giving information that is not wanted or, not offered collaboratively can evoke sustained talk and feels directive. Because the implication is, here's information, I think you should do something with it. And I've heard recordings of some of my students where simply, simply saying, I'm here to talk to you about a heart healthy diet, and that evokes some big reactants in patients. And it's just fascinating, I think, because that's something that we might not describe as being too directive, but I think it definitely falls into the category where giving information in a way that's not collaborative ends up being directive and counterproductive.

Paul Warren: I'm so glad you said that, Carol, because planning, I think, is particularly associated with the pressure, the internal pressure that the provider might feel about, like, here's my chance to provide the information because we've arrived, quote unquote, at this point. And I love that example you gave from your students recordings, because I could totally imagine an, am I consistent approach to that same statement. Could be something like, we're here together today, and one of the things we're going to focus on is a heart healthy diet. I'm wondering, what are your thoughts about that? What do you know about a heart healthy diet? So inviting that person before assuming, like, I'm here with my battering ram of education

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Paul Warren: to share with you. and I really appreciate you saying this, because education is a critical part of what we do. We do know certain things. We do have valuable information to share, and it is possible to do that in a collaborative, partnering, respectful way that doesn't leave the person feeling like, hey, Carol's telling me what to do, or she's talking down to me. and it does have everything to do with the approach we choose.

Carol DeFrancesco: And then I think about the. I think Bill talked about a, ah, creative tension between directing and following and the opportunity to work out that creative tension as you're talking with somebody. And when I think about the dilemma that my students are in, they're basically following orders from maybe a physician or somebody else on the medical team saying, hey, go educate this person about x. and so they're thinking, well, I'm just doing what I am supposed to do, but how do you actually pull that off with the patient sitting right in front of you in a way that's collaborative? and honestly, I think it takes practice. Right? Because those middle ground approaches, often don't

become sought after until you kind of hit your head up against the wall. And literally the patient, in this instance, the patient said to my, my student, heart healthy diet, I could tell you a few things about a heart healthy diet. and my response to that is, that's brilliant. Thank goodness the patient was honest, because those are the things that you can really. I'd much rather have somebody be honest with me than just say, yeah, yeah, go ahead, tell me everything you know. And then they toss it in the garbage can as soon as you leave the room. So.

Carol DeFrancesco: Again, just a few more thoughts.

Amy Shanahan: And we talk about a lot. How does it land on people? And that example, is like, the patient's giving you feedback. Hey, wait, back up. That's what I'm hearing. You're going to tell me about heart healthy diets. And I'm working with a group of people who are involved in the court system, and I about their children, and their children have been taken away or they're imminently, you know, in trouble for that. And similarly, to what you're saying, carol, is that they'll say things like, well, the judge said there's domestic violence in the home. And start off with that. And automatically the person is on the defense. And it's so important to, for me when I hear that, like, wow, maybe the person doesn't think of it that way, and oftentimes they'll respond in the same way. Well, I don't know what you're talking about. Domestic violence. My boyfriend and I got in a fight. My God, don't you ever get in a fight? And that's a, measure of the person's giving you some feedback. Like, you pushed a little hard, or you said something that doesn't fit for me.

Paul Warren: And hopefully the person that's the beneficiary of that feedback is going to have the savvy to know that person just gave you a gift and you can adjust your approach in order to be with them as opposed to creating more discord or evoking

more sustained talk.

Carol: Planning can be done using an MI consistent approach

And the thing that I love about this particular episode, and im so glad that Carol agreed to join us as the special guest for this particular topic, this idea that planning can be done using an MI consistent approach. Planning is one of the four tasks. And just because weve arrived at planning, we can choose to maintain our directionality and avoid becoming directive simply because were planning. And I think that there's confusion about that, that folks seem to think that for some reason, because we've arrived at the, you know, we've evoked commitment language, we've employed that commitment language. The person has started to lay out what the plan is. Somehow some regression, is too strong of a word, but something gets triggered where there's this thinking that, like, ah, now I get

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to throw in my part and, you know, your part can be of value if the person is interested in your part, their part is more important than your part.

Amy Shanahan: I noticed that for me, I get excited for people when I hear more commitment language. And I have had to work on that. I start to move in and go, all right, let's go in a cheerleading kind of way and get all excited and want to help them formulate their plan. And sometimes it's a little pushy. And I had to really work on that. Like, what am I doing? Why am I heading there? M I don't know if it's long term habits. I have no idea. But I did notice when I listen to my work or notice when I'm talking with

people that I get really excited when they start to say, I'm going to do this. I'm m going to start this tomorrow.

Carol DeFrancesco: Yeah.

Paul Warren: It's exciting. That is exciting. It's just what we do with the excitement that, right.

Carol DeFrancesco: Well, and it makes me think, too, what's underneath? What's underneath? The excitement about planning, the impulse to push forward, maybe more quickly. And I'm thinking about, I'm thinking about a webinar that Terry did. and she talked about two things. She talked about, don't take that contract, basically. And she was saying, look, who's driving this planning? Is it because you want, like in the example I just gave, is it because there's a doctor's order that you're following through on and you need to show something for your work? And so where's the patient client in that scenario? Where's their autonomy? And then the other thing that stood out to me is, sort of an underlying anxiety. again, related to I need to have something to show for this session and how, a well described plan might feel good to the clinician because it's concrete and I have something to show for it. But is that, who are we serving there? and not to say that planning is bad, because I think there's plenty of evidence that it's very helpful and very effective. And I think it's also helpful to be mindful of what's underneath this, what's motivating this. Why do I feel good about now I get to plan. am I so attached to the outcome of this session that that's driving my planning? So it just makes me wonder about all those things.

Amy Shanahan: You know, and people that I've talked with about planning, they struggle about the institutional expectations. The insurance company wants a plan, I

have to have a discharge plan. As soon as I start meeting people, I have to have steps to put in their treatment plan. And they get really, they really get bogged down wanting to have a conversation about that and start to think that mi, can't work for them because they're being pushed to make a plan like the institutional pieces of that. And how do you, how do you navigate that?

Time is always the big factor in motivational interviewing, especially in training

Carol DeFrancesco: Well, and I was going to just ask you about that. So that is a real dilemma, especially in training. And what are some of your approaches? I mean, both you, Amy and Paul, I'm curious how you, how you deal with that.

Paul Warren: I love this question because one of the things that folks are always trying to figure out, and usually time is the big factor. People often will say, like, I would practice motivational interviewing if I had the time. And really it's not, to me, so much about the time. It's really about the skill and the ability to actually practice. Am I? Because if you really know what you're doing, you don't need a whole lot of time. And ultimately it depends on where the person is at anyway. So time is not, to me the same kind of factor. I think the way I handle this, quote unquote, in trainings or the thing that I like to help people understand is, yes, we have to acknowledge the realities of that pressure, that organizational, programmatic, supervisory agenda slash pressure. And that shouldn't at all keep us from developing a preliminary or an embryonic or a foundational plan that we maybe include as part of the record. It doesn't mean that

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Paul Warren: we still can't work with the person to identify what their plan may be. And then how to integrate these two things as that conversation goes forward. So, yes, yes, the program, you know, may say, like, you know, after your 1st 45 minutes session, you need to have a plan. Okay, well, based on that 45 minutes, based on what you've gotten out of that 45 minutes, develop a preliminary outline of what that plan may be. Again, it may have specifics on it. You know, that that's not in stone and that people are moving toward a plan as they go through the process of exploring their ambivalence and identifying and strengthening their motivations, that that may change. So to know that what starts in the beginning is going to evolve into what it could grow to, that's my initial response. And by the way, Carol is seamlessly observing our format of bringing questions to the table that we're all kind of pondering together. So we invite anybody who's listening to this collaborative conversation to ponder these questions about how you may be approaching this or what your thoughts are about it, too, and to, by all means, write in and share your feedback.

Paul: Bringing that explicitly into planning is important

Carol DeFrancesco: You know, Paul, at the end there, you mentioned and that, plan may change. And I think bringing that explicitly into planning is important. I observe a couple of things with planning is a, client sometimes, reflex to overshoot, to plan too big. And I think part of that is they want to look good or something. Here's my big plan. and so maybe one of the directional things that we do in planning is invite people to cut the plan in half. and I've heard people do that, and I feel like that can be an effective strategy, is to, let's start small. You know, it's okay, let's start small. But then also that idea of this is, you know, we're just trying this out and acknowledging that it's part of the. We're. We're honestly dialoguing with the plan. Is this a good plan? Is it gonna

work? Let's try it out. Coming back and. And tweaking the plan. but setting that expectation that this plan is not carved in stone. It's just really a starting point, and we're all going to learn stuff. especially if you have the luxury of seeing somebody over and over again.

Amy Shanahan: m and the work that I mainly do, people do pretty much see people over and over again, and they talk about having to put their interventions in the record. And I said, if you're working with someone who's ambivalent about stuff, then what words would you use? So I put it back on them. Sometimes. What words would you use that the person is going to do when they're struggling with I'm not sure I want to, or maybe I need to. and then they come up with actionable words like explore, consider, you know, create a pros and cons list for themselves about a medication, whether or not to take a medication. And you know, it really helps them to understand that they can plan, to plan. Like you said, cut it in half, cut it in quarters. They're ambivalent. They don't know if they want to change. They don't know if they want to take this medication. They don't know if they want to be abstinent or whatever it is their goal is. And inviting them to explore that.

Paul Warren: You know, I just want. Oh, go ahead, Carol. Please go ahead.

Carol DeFrancesco: Oh, thanks.

Giving learners time to think about what they want is really important

You know, related to the exploration piece, I was also thinking about how sometimes it's not actually fair to ask somebody to think about a plan without giving them the

opportunity to reflect and spend some time discerning ahead of time. And so if we have the chance to sort of preview the conversation with somebody and invite them to think about what they might want to change, if at all, or when I'm working with learners, what do they want to learn, what skills do they want to change? Because some people are fast thinkers, right? And they're like, oh, this, this and this. And they rattle off three things and others, they look and they think, I don't know, you know, and it's not terribly fair to put people on the spot sometimes.

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And so giving folks the opportunity to think and reflect on where they want to go, I think is really important. What do they want? You know, whether it's their own personal behavior changes or their own learning objectives. But how important that question is, what do you want? And then once that, at least those, we have a few answers in that arena, then moving together collaboratively, well, how do you think you might want to get there? But that initial what do you want, I think requires some reflection.

Paul Warren: I love your parallel analogy to the MI learner because I could imagine at the beginning of, a learning community conversation about motivational interviewing, I could imagine people saying, I want to become proficient at motivational interviewing. Okay, this is a six hour learning community conversation. And they realize through the course of being in that conversation, through the course of reflecting on that conversation, oh, the thing I really want to learn how to do is I want to be able to offer more reflections than questions. So the specificity as they, live in the exploration becomes more evolved and refined and ultimately more their own. Because without that reflection, without the experience, it's just a large, general idea. When you're kind of living in it and exploring it, as you said, Carol, it becomes more realistic, it becomes

more in relation to me, the person who will actually carry out the plan.

Sometimes the strategy is helping people to right size the plan

And I just wanted to add one other thing in regard to what you were saying about sometimes the strategy is helping people to right size the plan, because they may have a gigantic idea or, a gigantic canvas in the beginning. And the funny thing that I've heard people talk about in training, sometimes it's like, well, I really feel like it's my job to get them to see the reality of what they really need to focus on. That's just too big. You really should just focus on this. And I invite people to consider the impact of that, which is, isn't it far better to meet that person with the large vision that they have and engage in that dialogue about that vision? And as you walk along with them, they come to the conclusion of that, you know, maybe it's enough if I just cut down by three cigarettes a day, not stop altogether. So I, just wanted to throw that out there, because that's partly being directive, telling somebody, well, you know what? You can't really achieve that you need to do this. That's a form of directiveness that I think robs people of their hope, possibly, and their vision.

Carol DeFrancesco: That's a good, really good point, and I'm glad you brought that up, because it is another example of that tension. As somebody who's listening to a client and you have this intuition of, maybe, hm, we need to pare this down. And, that impulse of being directive right, right there, it's right in front of us. and taking a step back, inviting dialogue, staying with engagement, evoking all that. It's great that you brought that up, Paul, because it makes me realize how easy it is for me if I'm opinionated about something, to slip into a more directive stance.

Paul Warren: I think in addition to possibly being opinionated, I also think it has to do with how much you might care about the person in the situation, because you don't, you, quote unquote, don't want to see the person fail or become discouraged. And maybe them realizing, gosh,

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Paul Warren: this is bigger than I thought it was going to be, is part of what's going to motivate them. So, yes, my opinion can be involved, and yes, my care can cause me to be directive too. That's potentially robbing the person of their journey. I think on some level.

Amy Shanahan: You know, I mentioned the, worker or the helper that has this institutional expectation.

I started to think about the clients or the people coming to get care also have expectation

I started to think about the clients or the people coming to get care also have an, expectation. And I'm working with folks who are considering quitting smoking or cutting down, and a lot of times they'll come right out of the gate without me saying anything. I'm not ready to quit yet. I only want to cut down. And I said, sure, yeah. When you offer them that autonomy, of course I'm not going to push you to tell you what to do or when you have to do it. And I think folks outside of the Mi realm sometimes look on and go, wait, but this is a smoking cessation program. I was like, yeah. And they just told me they are not ready to quit yet. And I've had so many eye opening experiences where

one is like, adamant, I am not quitting. And six weeks later called me and said I quit. I totally decided to quit. So it just reminds me of people's own volition. They might say they're not ready today and they could be ready tomorrow. So I have that belief and that hope that they'll do it when they're ready, but they have an expectation that we're going to tell them. They have to. We're going to tell them what to do.

Paul Warren: You know, I love that image, Amy, because in terms of that belief and that hope and holding that belief in that hope, and I think the key perhaps to not being directive is holding that hope, but not holding it with very sharp claws. It's holding it with a gentleness and a fluidity of that. Yes, I can be hopeful for that, and I don't have to push for that. I don't have to be invested in that. I can, if that comes, I can affirm it, I can support it, I can help it to grow. And, because I can just imagine sharp, clawed, sunken hold on that hope could start to feel like pressure. I'm hoping that you're going to quit completely. I'm holding on to that hope that it's going to be tomorrow, you know? And I don't think that's what you're saying. I think you're saying that it's this allowance, this wish for it without any pressure to achieve it.

Amy Shanahan: Oh, absolutely. I mean, the hope to me is feeling and hearing sometimes their desperation of, wanting to make this change, struggling to make this change, having health problems, knowing, as we all know, that they know what's best for them and yet they still struggle. So just having that genuine, I think I'd use the word genuine hope without intention of clawing in and expecting that by the end of my relationship with them, they're going to reach their goal or achieve, something.

Paul Warren: Yeah, you know, I'm glad that you put it that way because that's also about me as the provider, being very clear about my expectations. Because if my expectations are that by session twelve we're going to be. That's problematic. That's really

problematic because talk about directiveness.

Amy Shanahan: Under the radar sounds like manipulation to me.

Paul Warren: I didn't say that, I just did. I know. Carol's gotten very thoughtful. I can tell.

Self awareness is required to move through a conversation with someone holding hope

Carol DeFrancesco: Well, your last comment on if by session twelve my expectation is this. It makes me think how much self awareness is required to continue to move through a conversation with someone holding hope. being attentive to, am I becoming pessimistic? Am I becoming impatient? Where am I attached to the outcomes? How is that driving my impulse

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Carol DeFrancesco: to plan all these things? And also a while back too, you mentioned, how getting good feedback from a client is so helpful, and how I love Bill's quote on our clients will teach us how to do that. So just how much self awareness and in the moment attentiveness is required to find the balance to move forward in a helpful way. It's no wonder that it's difficult, right, for people to take on these skills. And it takes years and years of practice. and I think that's what makes it really, ah, rewarding too, that every conversation is different. at the start, Amy, you mentioned that I'm a surfer. And one of the things that's exciting about surfing is every single wave is different. Every single one is different. So you can practice, practice, practice, and you really have to

attend to how is this wall of water behaving right now in this moment? And how am I responding to it? and that's engaging because it's never the same. You know, it's, it's, it's, it's always new, there's always fresh.

Amy Shanahan: And I would imagine that not every day you're the same. So every time you go out to surf, you have a different space, you're in a different mindset. You might not be looking at the horizon like you know you should, you might have stuff going on. And that affects how you, address that wave, doesn't it?

Paul Warren: You know, I'm seeing a potential change in the fifth edition that we want to surf with people. We don't want to wipe out with them.

Amy Shanahan: We'll change. Instead of dancing, surfing.

Paul Warren: Right. Instead of dancing to wrestling, it'll be surfing to wipe out.

Amy Shanahan: Wipeout.

Carol DeFrancesco: Well, and even wipe out is feedback. Yes. If you can get enough insight from it. I had recently the experience of, I, literally dove straight off the front of my surfboard, which often never happens. I usually fall to one side or the other, but usually not straight off the NOCE, you know, like a diving board. Like, you don't want to use your surfboard as a diving board generally. And I thought, what the heck? How did I do that? You know? But even a wipeout is. Is instructive. And I think, you know, with our clients, if we can repair those wipeouts, then we, can move forward in a way that's. That's still helpful. M so it's all. It's all learning.

Paul Warren: It is. And, you know, Carol, wipeouts can be feedback upon reflection. And that's moving beyond the fact that it's a wipeout. It's that it's feedback and that there's potential learning, and we can, of course, go back and repair. That's one of the beautiful things about motivational interviewing. It's not this fragile, brittle, like, oh, my God, I messed it up. It's over. It's not like that. We can mess up. And, Amy, what do I usually say at this point?

Amy Shanahan: You can course correct. Yes, I passed the test. Yeah.

Paul Warren: No test. No test.

Amy Shanahan: Well, you know what? I'm curious what you both think about. So, Carol, you wiped out. You, like, NOCE dived off, used your, board as a.

Paul Warren: Diving board.

Amy Shanahan: Diving board to jump off. And that's not what you typically do. What kind of exploration would you want your coach or your mentor to do to talk with you about that? And I'm just really curious about what either of you would say, because now, of course, insert someone who returned to use or was on a good, healthy diet kick and returned to their eating habits, or maybe they stopped taking their medications. Well, you know, whatever. Whatever the return to some behavior is or some mistake or something that happened, how would you approach that? Because I've also, heard people struggle with that a lot, and I'm just going to leave it there. See what you think.

Paul Warren: Carol and I.

Amy Shanahan: Would talk to when your coach sees you dive off your surfboard.

Carol DeFrancesco: Yeah, you know, I'm thinking about the research on affirmations and affirming effort, how important that is, even when the outcome, like, so, I didn't catch the wave. I nose dived off the front. But, damn it, I put the effort out there. I paddled hard for the wave, and then something didn't quite work out. So affirming effort, I think. I think, is really important. I know, at least for myself, as a. You know, as a very mediocre surfer, I can get discouraged. and so I. And there's. There's good research on self affirmation, too, because I don't have a coach out there with me. but. But, you know, affirming the effort, letting it go, and just keep going to the next moment. so I wonder how that translates to our work with our clients, you know, affirming their efforts, and inviting a conversation around, learning. I think those are the two things that come to mind.

Paul Warren: I love the idea of affirming the efforts and starting that way. And I can imagine Carol's imaginary coach out there, saying to her, you paddled hard for that wave. And really acknowledging the work that she put in to get there. And to me, one of the second things that jumped into my mind, and I love that Carol started with affirmations, because affirmations can be so powerful if they're specific, if they're real, if they're connected to the moment and they're connected to something that is intrinsic or deep, to Carol's efforts or her strengths or identity. The second piece that came to me is really seeking to understand it from Carol's experience and really, really trying to understand it instead of trying to solve it. How do we prevent that from happening again? But really, really digging deep into. Really trying to understand it from Carol's perspective, which is inviting her to tell her story about the event, her experience of the event, having an understanding of how she felt about the event. And without, stigmatizing the dive off the front of the board, either. We don't want to stigmatize that,

because that just leaves the person feeling like a, ah, failure.

Amy Shanahan: And I think a common question that I hear from folks, and it's an open question, so what do you think you'll do differently? What did you learn from that situation? And it's timing. I'm not saying that those questions are bad, but it's timing, because if I came out saying that, it's like I'm focusing in on oops, the oops part instead of the affirmation, what you did well, and diving right into well, what do you think you'll do different? And that's really what I hear. A lot of folks want to go in, and I think you said it, Paul. Look at the problem. Or look at the oops first.

Paul Warren: Yeah, look at. Look at what happened and what the person's experience is. And Amy, what you just said relates so much to what Carol said, because how can somebody possibly know how they're going to not dive off that board again until they've reflected on why they dove off the board, why it happened, what, to Carol's earlier point, the need for some people, instead of just filling the space with, like, well, I would do this, this and this, and there may be some people who could offer that that quickly, but for other people, maybe they need to be able to reflect on that and in a non judgmental, uninterrupted way.

Carol DeFrancesco: The other thing that came to mind as we were talking about this is, a degree of lightness or even humor when it comes to. Because honestly, when I dive off the front of my board, it's pretty hilarious. And I pop up out of the water and I think, well, that was funny. And having an expectation that it doesn't have to be perfect, I think can be really helpful in are, you know, efforts to make a plan work or try out a plan or change a behavior or catch a wave. so. So I wonder how that translates.

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Carol DeFrancesco: I mean, do you have thoughts on that, how lightness translates to our work with our clients, certainly our work with our learners? I'd be curious.

Paul Warren: I would say, 100% essential. Because I go back to my claw image if there's not a lightness to it. And don't misunderstand me. I don't mean that attention, weight or seriousness is not present when appropriate, but an over emphasis on, gravity, intensity. The person may not see it that way. I love the fact that the way you describe it, like, you know, when I jumped off that board, it's pretty funny when I pop up out of the water. If you see it that way, what business do I have interpreting that as something that you experience in a different way? I would be much more effective if I meet you where you are about it and don't try and sink my claws into it. And I don't know why this image keeps coming back to me, but it does speak to the lightness. The lightness is not grasping.

Amy Shanahan: I think that that would have been my answer was really, it depends on the person, because depending on what they're coming in with, they might come in with their own disappointment or their own heaviness about whatever it is that they did. so it really, it's really contingent on how they're coming in and then the lightness would be more about affirming their efforts. But it really depends on where they are with.

Paul Warren: Yeah.

Carol DeFrancesco: You know, and when I think about the post planning dialogue, how much someone's expectations about a certain plan would feed into that light. The ability to be light about it.

What do people define as success? What are they defining as success

Honestly, what is success? What are they defining as success? and how that can be a very helpful pro law or, it can set up somebody for not feeling like a failure. Right. If they're defining success in a way that is achievable, that is self compassionate, that doesn't require too much rigidity or perfectionism. And I guess I think about this, I don't know if the surfing, analogy is going to work for the folks listening, but it's helpful to me. But when I think about it, I get into the water with my surfboard and I think if I get one good ride and one good wipeout, I'm fine. Like that's my measure of success. and I wonder how that translates for people who are attempting to cut back on smoking. How it translates for somebody who, who wants to reflect more and ask fewer questions. kind of defining their own measuring sticks for success.

Amy Shanahan: I wonder that too. I think people sometimes put high expectations on themselves. Higher expectations than that. And hardly ever the wipeout part. Hey, I think I'll just, you know, it's all right that I'm going to go back to ten cigarettes when I cut down to five. And, when I talk with folks who I'm working with on that very topic, it's almost like they're telling on themselves when they wiped out. I really had a stressful time and I almost like, it's a confession and I'm going to bless them from their wipeout. And so it's really helping to affirm them and also be compassionate that they feel disappointed because they set the bar higher than they wanted or they had an unanticipated, I don't know, roadblock, whatever it is that they feel disappointed. And I sometimes wonder if our systems of care also set it up. Sometimes that they think that we're going to expect them to do something. I remember talking to someone about making an effort to do something, but I didn't do the whole thing. And I, felt like 6ft tall when the person was like, you did it, you did what you wanted to do. And I was like, oh,

all right. But in my head I was like, but I didn't do it the whole way, or I didn't do all of it or so. it's really contingent

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Amy Shanahan: on the person, I think, where they're coming from.

Paul Warren: I love the fact that our discussion about planning directive versus directional is raising this question of success, because success, I think, in many ways is. It can be an imposed and overrated and inaccurate label. And I'm going to give a very wacky, concrete example that does not involve surfing, sadly. So. But I think Carol might be able to identify which is which is that almost every training that I get the opportunity to do about motivational engineering, I always talk about a behavioral change goal, a real behavioral change goal of my own, which was to cut down the amount of french vanilla creamer that I was using in my coffee because I was using so much french vanilla creamer in my coffee that I had very little coffee, and I had to buy new pants because french vanilla creamer is high in sugar and it caused me to gain weight. So I tried many strategies to address this behavior change, basically counting the amount of teaspoons of creamer I put in it, blah, blah, blah. All these different strategies I tried. And finally, what I settled on and have had tremendous success on, for the most part, success. My success, tremendous success for the most part, is I do not buy it and bring it into my home. And when I'm at a hotel and they happen to have french vanilla creamer, I drink it. So that's my wipeout, and that's the wipeout that I feel okay about. I don't beat myself up. I don't feel guilty. I remind myself that my pants fit. And I also remind myself that I'm not buying french vanilla creamer and I'm not bringing it into my house. That is not a success that when I originally started focusing on this goal, that's not how I envision success. Success. The way I envisioned it was that I,

never drank french vanilla creamer again, and I was a 32 waste. Neither of those things have occurred. But perhaps ive said too much.

Carol DeFrancesco: Okay. I'm laughing so hard that it's hard to find the unmute button. That's a great, you know, that's a great example. And it makes me think about how the plan really needs to be owned by you. It's got to be your plan. 100%. And, how can we be directional to, if we're training new learners to really incorporate that piece very solidly into planning that it's, it's their plan, you know, I'm curious. I'm curious how you do that. What are some of the things that you include in your training to really, have the plan sit solidly with the client.

Amy Shanahan: That's a tough one. I think we talk about collaborating with them around what the expectations are. So I'm thinking about a lot of folks who come in, to care, or the doctor sent them, or the doctor said they had to be here or their probation officer sent them, all those things. So collaborating with them is a tough one, not a tough one. The collaboration part is not. The tough piece is really exploring with them what they're willing to contend with because they do have these institutional expectations. And I think affirming them that small steps, like we've been saying, are valid and advocating and helping them advocate for themselves about whatever it is, their plan.

Paul Warren: I think there are two things that I focus on in terms of this, with learners and even sometimes with practitioners. Like if I'm listening to their audio recordings and I'm giving feedback, it's two pieces. One is that helping, the person to be very clear about their investment in

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Paul Warren: the person following through on this plan, like what that means to them as the quote unquote collaborative partner, helping them develop the plan. So it's again about raising their own awareness, their own investment expectations about the plan. I think the other one is helping them to shift the focus of success is the collaborative dialogue that they've had developing the plan and how the person moves to inhabit the plan as opposed to the ultimate conclusion, because we're never there at the quote unquote ultimate conclusion of it. But what we can evaluate the success of is the dialogue that we've had with them about it, how directional we've remained and how we've supported this person's planning process. Because to make the transition from evoking to planning is a practice transition, and then being able to do that transition and help that person to develop and execute their plan and remain directional and not directive as that plan evolves is also another practice, sort of set of skills that we can focus on. And one of the reasons that I wanted to have this conversation about this topic is I have seen many practitioners become very effective at engagement, at focusing and evoking. They transition to planning after the acquisition of evoked or naturally occurring commitment language, and all of a sudden it's as if they never were using an MI consistent approach. They become directive, and all of a sudden there's this huge discord and disruption in the relationship because you didn't follow the plan the way I laid it out well, how likely am I to follow your plan? I'm going to help me to develop my plan, and maybe I'll grow into that plan.

Carol DeFrancesco: And having. Inviting somebody to engage in the planning process is itself a little microcosm of the larger conversation.

Paul Warren: Ah.

Carol DeFrancesco: When I was rereading the planning chapter in the fourth edition of

the motivational interviewing book, there are so many helpful questions to collaboratively transition to a planning conversation. and the research is really clear that when somebody's ready to plan, it's very, very helpful. It's a very important step. You know, I was. I was. I was struck by that, rereading both the planning chapter and then I reread the effective psychotherapist's focusing chapter, and the research is really clear that planning is helpful. And, for me, it was a little bit of a. Ah. Oh, yeah. You know, I feel like sometimes I shy away from planning on the continuum and really focus more on evoking. and one of the reasons I do that is because of, the research showing that, look, if you jump to planning too quick, you actually shoot yourself in the foot and evoke more sustained talk, and people go backwards. And so I think I'm always cautious of that. And the truth lies in the middle. Right. so not shying so far away from planning and teaching planning and practicing with planning. But I think the overall point that I wanted to kind of pick up on, Paula, from what you just said, is how planning is a process, and inviting somebody to engage in that process and then reflect on the helpfulness of planning for their own behavior change and their own goals, and inviting somebody to maybe come back to planning on their own and replan and modify their plan and tailor a plan, but really putting it as, like, it's a skill that they can take on for themselves or not really, but treating it as a process instead of, you know, so something that they could pick up

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Carol DeFrancesco: outside of your conversation with them and come back to it, you know, well, what do I want and how am I going to get there? and does it make sense for me to put a plan in place? that's kind of where my head went with that.

Amy Shanahan: So I'm curious, as we start to wind down our time together, which.

Aww. did you have other questions, or did you already reveal your super secret questions? We don't want to forget those. Yeah.

Carol DeFrancesco: So thanks for that. I do have a question for both of you, and this is based on a question that somebody asked me. So I was charged with teaching medical students, motivational interviewing. And the professor in charge of the lecture series said to me, Carol, what do you want students to remember a year from now? And I thought to myself, anything. But I thought, what an interesting question. What do you want the students to remember a year from now after you talk with them, about motivational interviewing. And so I'm curious for both of you, when you teach motivational interviewing, what is that big picture? What do you hope people remember a, year later?

Paul Warren: So I'm thrilled that you're asking this question, Carol, and I want to center my answer to this question on, this particular topic. So I'm thrilled that you asked this question and you're asking it in the larger frame of what do I want them to remember about motivational interviewing? And I'm going to narrow it to this aspect of planning because the thing I want them to remember most, and I'm very inspired by many of the things that you've said. And one of them, you really helped me to expand my thinking about planning, which is you used that the planning process is a microcosm of the larger process. And I couldn't agree with that more because the sheer fact that when someone's ready to plan and we make the transition with them to the planning process, that planning process is essential and of equal value to the ultimate plan that comes out of it. It's that process that's going to bear the fruit of, of that plan. So it's important to make that transition when the person is ready to make that transition. So that's takeaway one, from a year from now. Two, when you engage in that planning process because the time is right, there's commitment language. The person has started to

develop and offer a plan already. When you make that, keep your Mi spirit cap tightly affixed, to your head and resist if you can. This is an opportunity to offer your best suggestions, offer your education, help to bring the plan out from the person. Remain using an MI consistent approach.

Takeaway number two related to planning is listening. And I think that absolutely relates to planning

Takeaway number two, related to planning. Great. I love the question.

Amy Shanahan: My mind is swimming in the question. I'm trying to be succinct, which is not my forte, I think. What are my hopes? It's an oxymoronic question, isn't it, that I have an intention for someone to remember something in a year? It's whatever they remember that they remember something would be great, not my name. that the experience was valuable, that they learned something about themselves that they took away, something that they're going to do different in their practice. So in general. What I would like, is that folks realize that we can get in the way of someone's forward movement, and we have an opportunity to move aside and step aside and walk alongside folks. So that's what I got from all the jumble that was in my head. When you asked the question, I was like, no, no.

Paul Warren: That'S memorable.

Amy Shanahan: Amy really will

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Amy Shanahan: sign in next year and remind us that they remembered that.

Paul Warren: I will. Carol, how did you answer the question when you were asked the question?

Carol DeFrancesco: I thought it was a really interesting question, because people only remember 20% of what they're taught at best. I thought, well, goodness, what do I want them to remember? And then I think I went to, I want them to remember the experiences they had from being listened to. And mostly, I want people to listen well. and I think I. So, how am I going to get there? So, like, what do I want? I want people to listen well. How am I going to get there? You know, what are the sort of learning activities that get people to remember that? And I just lean into experience. I want people to experience being listened to really well. And I think that absolutely relates to planning, because planning is another, you know, as we're working with somebody, with planning through that process, it is a very close listening. You know, what does this person want? What are they hoping for? Where is their confidence shaky? where are they feeling? Maybe pushed? Where? Listening to your own inner dialogue. Where am I feeling attached to these outcomes? So listening is how I answer that question.

Amy Shanahan: Beautiful.

Carol DeFrancesco: Thank you for inviting me to talk

Paul Warren: Well, I have certainly appreciated listening to you, Carol DeFrancesco, and cannot thank you enough for joining us for this episode of Lions and Tigers and Bears MI, to discuss a topic that I just personally think doesn't get enough space for

reflection and exploration. And when Amy and I were planning this, I just thought Carol will be the perfect person to talk about this topic with because she will approach it in a prepared, thoughtful, provocative way. And, you met every expectation, so thank you for that.

Carol DeFrancesco: Well, that's very sweet. I'm glad. I didn't, like wipe out often.

Amy Shanahan: I was going to say wipe out.

Carol DeFrancesco: And I always appreciate talking with both of you. I mean, it's, I feel like if we can. Can, advance a little bit more compassionate listening in the world, we're doing some good work. So, thank you for setting this up and m inviting me.

Amy Shanahan: Beautiful ending. Thank you for joining us.

Carol DeFrancesco: You're welcome.

Paul Warren: Bye.

Thanks for listening to episode 29 of Lions and Tigers and Bears MI be on the lookout for new episodes coming soon.

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