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*"Knowing is not enough; we must apply.
Willing is not enough; we must do."
-Goethe*

A Knowledge-Based Lifeline: A Template for Individual and Company Action Planning

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The Lifeline:

The single most important requirement for planning and succeeding is to create **knowledge**. Knowledge is the one thing both individuals and companies need to generate and apply to stay relevant and productive in the future. Knowledge is the single most effective way to better oneself. (Note: the Lifeline is a valuable tool for planning growth and relevancy for companies as well as individuals.) The starting point for appreciating both knowledge and relevant action is creating a **Lifeline**.

The Lifeline is a documenting of the significant events of one's life to date. Once it is available, it serves as a tool by which to continue accumulating knowledge in the future and a stimulus to act on that knowledge. Knowledge is what got us this far, and knowledge is the indispensable currency to be productive in the future.

(Dr. Sidney Simon, the Emeritus Professor at the University of Massachusetts, Amherst and author of the iconic *Values Clarification*, devised a process called a "Lifeline." The Lifeline is an adaptation of the more traditional "Timeline.")

The most basic need for ourselves, and ultimately for those we want to encourage to

become knowledgeable, **is to inventory our individual pasts**. This can serve as the foundation for what we need to do to advance. The Greeks had an aphorism for this aspect: “Know thyself.”

The values of creating a personal “Lifeline” are twofold:

1. to get you to think of what you have done with your life so far, and, more importantly,
2. to serve as a basis for projecting what you hope to accomplish going forward. Histories (of countries, art, etc.) are frequently developed as “Timelines.” Since the timeline/lifeline is visual, it helps the developer of it to grasp the important points more readily.

Following is an exercise that is a variation of the timeline since it serves the same purpose: to create a concrete visualization of your past (and future). The importance of that is that by making it a “**Lifeline**,” you are adding an aspect to the process that will force you to consider what you hope to accomplish in the future. The reality of this is that the visualization will be stronger than a mere conceptualization of it, and thereby it will be of more help to you in controlling the direction of your future.

Where I've Been:

1. Draw a horizontal line across the top of this page. Put a tick mark at the left to represent your year of birth. Write your birth date underneath that mark. Next, place a tick mark to your right to represent the year of your anticipated death. If you have difficulty with this, allow that date to be designated by the national life expectancy for your gender. (Use the “life expectancy” number of years as a placeholder. The current life expectancy for women is 81 years, for men 76 years.)
2. Next, chronologically list important events in your life to date under the header “Where I've Been.” The specific events (milestones in your life) will be prefaced by a rough date. Focus on points of knowledge and events of accomplishment.

For example:

Fall 1994: started school;

Spring 2004: won honorable mention prize in Science Fair;

June 2005: graduated from high school;

Fall 2005: started college.

3. Place the planned events on the Lifeline. This activity will require concentration to remember the important events in your life, but once achieved, it will serve to bring to mind that there have been significant achievements to get you to your present state.

Where I See Myself Next:

This is a conceptualization of where you want to be at certain future milestone dates. For each projected date, conceptualize and specify everything you would like to be true at that time: additional education, job, salary, potential for advancement, etc. Keep in mind that the primary objectives are to become more knowledgeable, to have more skills, and ultimately to act on what you have learned.

So specifically, where do you hope to be:

1. Five years hence:
2. Ten years hence:
3. Twenty years hence:

Project out at least twenty years. If you set your future course to achieve what/where you want to be, you will find it easier to get there. If your ideas and priorities change over time, update your Lifeline projections. Remember, you are choosing specific points of knowledge, not ephemeral, immeasurable platitudes.

Sit back and meditate on your Lifeline. After a minute or two of meditation, answer the questions: How do you feel and what do you think as you look at your Lifeline? What have you learned? What knowledge-based accomplishments can you be proud of? How will you use the rest of your time? What specific things do you want to learn and more importantly do before you die?

Perhaps most importantly, establish a plan. Create specific, measurable objectives. Think about ways that you can acquire more knowledge for a life filled with meaning and action. Write these objectives down. Establish an action plan to accomplish those objectives (see *Figure 1a* for an example).

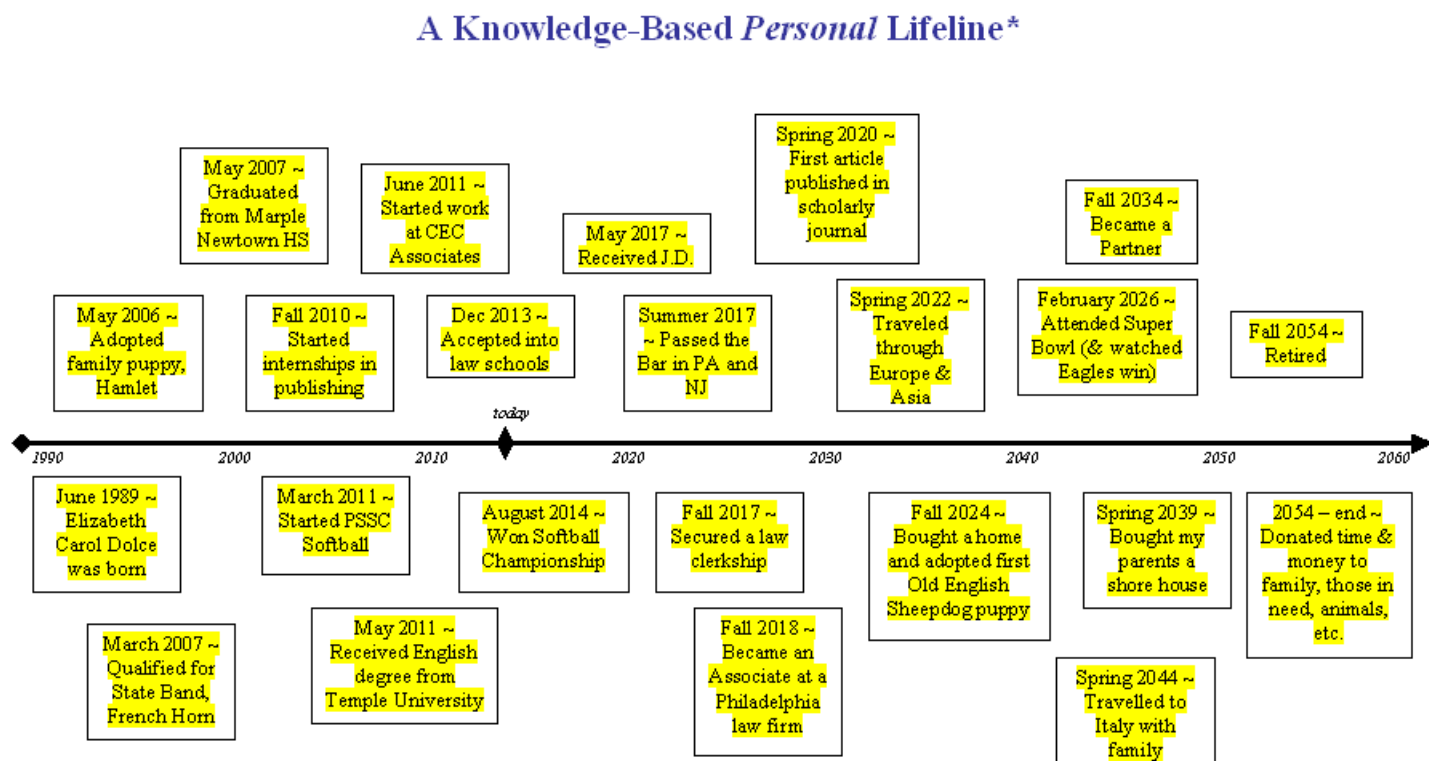


Figure 1a

The Company “Lifeline”

As a starting point for having employees develop personal Lifelines, companies can also generate and profit from having company Lifelines (for an example, see *Figure 1b*).

Someone in the company who has knowledge of the various stages of its development should enumerate (list) them as a reference base to setting new growth and advancement objectives for the company. Developing a company profile, a Lifeline, can serve as the background needed to set new objectives for the company.

CEC Associates, Inc.: A Knowledge-Based Lifeline*

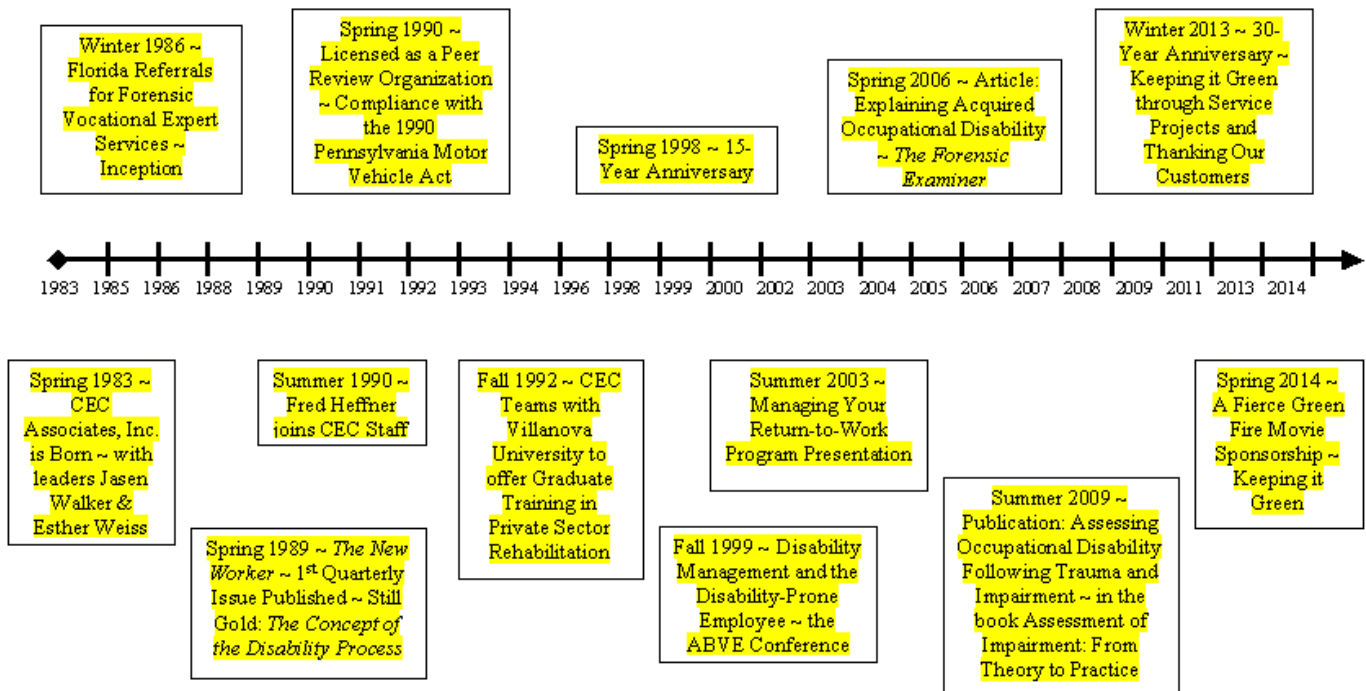


Figure 1b

Where CEC Associates, Inc., Sees Itself Next:

Members of the CEC staff have written articles and published in many professional publications over the years. CEC has also presented, in seminars and workshops, the importance of understanding vocational assessment in different arenas, including workers' compensation, case management, occupational rehabilitation, psychology, and forensics. The organization has been committed to giving back to the community, continual training for employees, and providing customers with guidance and knowledge of the disability process and the purpose of vocational evaluation.

The Future of Higher Education

Higher education is moving away from brick and mortar schools (colleges and universities) to individual motivation and self-instruction means. (This future requires that individuals become more self-reliant and self-motivated to compete. Simon's concept of the Lifeline is used as a primary tool in the effort to become more self-reliant.)

The costs of higher education are already prohibitive, and parents and individuals are finding other ways to acquire the knowledge needed to succeed. Leading this new direction are MOOCs (Massive Open Online Courses), especially Stanford's [Coursera](#) and Harvard/MIT's [edX](#).

As advocates for the increase of knowledge by our peers and our children, we consider these new and original sources streamlined routes to broadening the knowledge base. The basic outcomes from taking a course now are certificates from the college or university that offered the online course. But future MOOC courses will be credit courses. Present courses are rigorous and college level, but not yet converted to credited hours.

The point of the MOOCs is not to eliminate, at least at first, undergraduate and graduate degrees, but to dramatically increase the number of Americans who have gained knowledge through certification, one course at a time. Ultimately this approach will modify itself and become the standard method of earning a degree. Some in-class courses -- almost certainly a limited number-- of courses and the rest independent MOOCs. The college years of the future will change dramatically.

Knowledge in the Workplace

The core repository for knowledge going forward will be the workplace. Individuals with marketable knowledge who advance the general good and who put their knowledge to practical ends will, of course, be significant contributors as well, but the primary source of knowledge will be enlightenment in the workplace.

The axiom "A rising tide lifts all boats" may be appropriate here. More individuals with knowledge will fulfill the basic requirements necessary to sustain life on our planet. What we, the rest of us, need to do is put those ideas to work, **and the workplace can be fertile soil for this idea.**

Some large employers (General Electric, Google, etc.) are already dependent on their employees being highly/uniquely educated and innovative. These companies' existence depends on their capacities to generate knowledge. Now it is important that smaller employers come to understand that they too can flourish by encouraging and prodding for knowledge generation and action plans based on that knowledge.

Employers, especially those in so-called "small businesses," will have to come to grips with this need. The need will have to become a requirement. Every company, regardless of how small, will profit from the same process at work as the leading-edge companies. Employers can no longer claim they are different or that their business does not need fresh ideas and new knowledge. Managers will have to encourage and prod for knowledge generation and associated action.

Back to Basics

The critically important issue is **to increase the level of education for everyone**. Many people believe that Thomas Piketty (author of [*Capital in the Twenty-First Century*](#)) has identified the problem: the widening inequality between the top 10% and the middle class. And the gap continues to widening.

It is critical that others than the 10%ers work out the details of how to educate more Americans. Only through a better educated populace can we hope to generate the ideas and creativity needed to reduce the difference between the top one-percenters and the rest of the population. Only by increasing the number of educated people in the U.S. can we hope to break down the disparity between most Americans and the wealthiest Americans. And in the long run, this disparity in income will be critical to the economic stability of the nation.

The purpose of this article is to suggest **one way to begin the process of educating more people**. In the final analysis, others will have to add realistic plans for how we can get there. The most success will be achieved through a composite of ideas. At this point, the idea of significantly improving the American education system may appear to be futile and unattainable, but it isn't, and in fact, it has been done before. We need to start the process and continue to ask others to contribute.

One way or another, we need to get more Americans knowledgeable. Knowledge is the single factor that breaks down the difference between the one-percenters and the rest of us, the difference between those who will act on climate change and those who deny that it exists, the difference between government action and leadership stagnation.

Daniel Kahneman's Systems of Thought

At CEC Associates, we have spent considerable time attempting to unlock the cabinet that we hoped would contain answers to what can be done to teach new workers to develop and apply the necessary skills to be in charge of their knowledge acquisition. We have carefully considered numerous paradigms, including, [*Gordon's Leadership Effectiveness Training*](#); assertiveness training; application of [*Maslow's Hierarchy of Needs*](#); [*Positive Psychology*](#) and that school of thought's [*Values in Action*](#); and our own Preparation, Execution, and Follow-up (PEF), to name just a few. After 30 years, we have found some value in each of these programs of teaching/learning. We would become so obsessed with the methods of teaching novices **how** to work, we named our organizational newsletter, *The New Worker*, with the hope that it would keep us and our readership focused.

Recently, we introduced ourselves to the genius of Daniel Kahneman's research in how one might conceptualize the processes of human thought and decision-making. Kahneman received the 2002 Nobel Prize in Economic Sciences and in 2011, he published much of his research with the late Amos Tversky, in the bestseller, [*Thinking, Fast and Slow*](#).

We find that Kahneman (and Tversky) have conceptualized human cognition, and mental processes in general, with a wonderfully powerful model of two systems, aptly named System 1 and System 2. Kahneman asserts that System 1 is the most active of thought processes leading to decision-making and behavior, and for the most part, it is unfortunately contaminated with heuristics, simple procedures that help find adequate, though often imperfect, answers to difficult questions. System 1 generates impressions, feelings, and inclinations that do not have a basis in objective reality. System 1 focuses on

existing evidence and ignores absent evidence, and Kahneman names this mechanism: “What You See Is All There Is”.

System 1 tends to avoid important questions, such as, “What would I need to know before I formed an opinion about...” System 1 responds more strongly to losses than to gains, or in other words, it is loss averse, and as a result, frames decision problems narrowly, in isolation from one another for fear of losing through taking a risk by gathering and analyzing additional data.

In contrast, System 2 is relatively lazy. That is, System 2 requires agency and mental energies that make calling upon it inconvenient, time-absorbing, and often stressful. As a result, System 2 is much less active than System 1, a system that allows for what Kahneman calls “cognitive ease.”

For years, we have probably overlooked the real possibility that novices or new workers have been thoroughly inculcated through our parenting and educational systems to rely almost exclusively on System 1. More recently, these methods of inculcation with heuristics have been dubbed a national educational effort to assure that no child will be left behind. For as many years, some of us have thought, intuitively, thought “good” new workers could be found in the graduating classes of any liberal arts universities, and using our best System 2 thinking, that thought is probably correct.

Students who are taught to think slowly by using System 2 methodologies are those students who learn to formulate questions that search for answers rather than jump to conclusions. Rather than simply accepting that what you see is all there is, complete with its biases and invalidations, System 2 thinkers remain *engaged* and avoid premature reflection, a characteristic of the more active System 1. Remaining engaged is the important [“flow”](#) described eloquently by Mihaly Csikszentmihalyi, who helped author the fascinating text, “Talented Teenagers: The Roots of Success and Failure.”

Remaining engaged and asking appropriate questions until adequate data are secured and analyzed may be the hallmark of good workers. Whether they are new or old, good workers remain engaged. They avoid inferences, look for ambiguity, and express doubt. They are less interested in confirmation than developing further questions. At the risk of being considered perfectionistic, good workers are relentless in their pursuit of precision.

In [*As a Man Thinketh*](#), James Allen wrote, “A man’s mind may be likened to a garden, which may be aggressively cultivated or allowed to run wild; but whether cultivated or neglected, it must, and will, bring forth.” As policymakers, business leaders, educators, and parents, we have the responsibility to help our children tap into the power of System 2 and bring forth good work. Rather than expecting children to provide rote answers, so that they will not be left behind, we need to teach them the power of asking informed questions and how to remain engaged as they search for better answers. Otherwise, the search for good workers will remain a never-ending task.

We believe that Kahneman’s *Thinking, Fast and Slow* is a must-read for all parents, educators, and business leaders.
