Wellbeing Roadmap
Optimizing immersive experiences

Reflection document only

Immersive Experience Team

February 18, 2019

Introduction

Project Overview

The wellness immersive experience can be a powerful catalyst to achieving sustained lifestyle change and the opportunity to deepen one's path to a fulfilled and healthy life. From destination spas and integrated health resorts to wellness retreats, the visionaries, operators, and patrons of these establishments have a keen understanding of the unique and transformational potential of these complex environments.
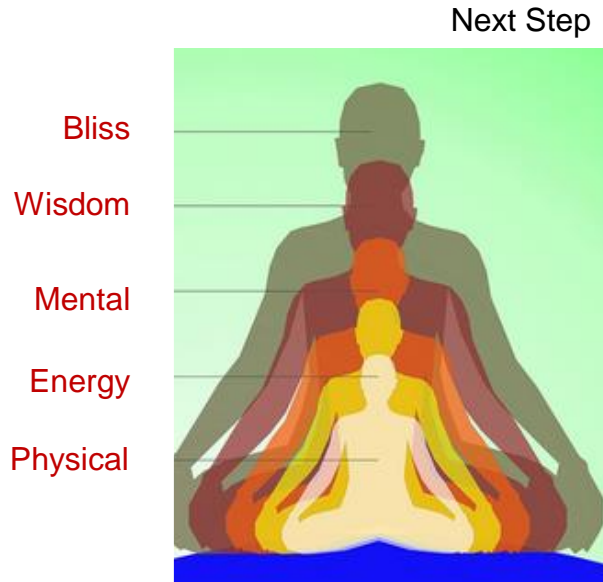
The purpose of the Immersion Initiative by the Global Wellness Institute is to highlight the potential scope of an immersion experience, highlight strategies to ignite a sustainable change by presenting findings from current and on-going research to the global community that substantiate the power of these evolved ecosystems.

3 Objectives 2019

1. **Presenting a White Paper** that provides an overview of current and potential immersive experiences in spas/properties to support facility owners in the design of their transformative experiences, leading to sustainable changes
2. **Defining a Wellness Mandala** that includes Doorways (based on our selection of wellness dimensions/Koshas/others), Pathways (Eastern/Western/Indigenous) and Maturity Levels (Explore, Engage, Embodiment)
3. **Cataloging Properties** that offer curated, integrative experiences that meet our definition of Wellness Immersion.

The 5 Kosha Model (or doorways) to Personal Transformation

To help us scope immersive experiences, we are initially using **koshas** to scope out immersive experiences. It describes a series of energetic sheaths (energy bodies) that encase the physical human form and regulate health, consciousness, awareness and many other things to progressively grow into one's full potential. Our final recommendations will also investigate practices in Eastern, Western and Indigenous practices to produce an inclusive model.

Next Step

Bliss

Wisdom

Mental

Energy

Physical

Exploring
complementary
pathways:

Eastern
Western
Indigenous

Inclusive model
and langage

A Maturity Model for Personal Transformation

Clients wishing to embark on a personal transformation journey will go through many phases before reaching maturity in any particular domain. Individuals can remain in anyone phase for a lifetime or quickly travel up the **maturity vector** based on personal attributes and the environment supporting their journey. An immersive experience needs to be respectful of individual intent, while providing a stimulating environment for a transformative journey.
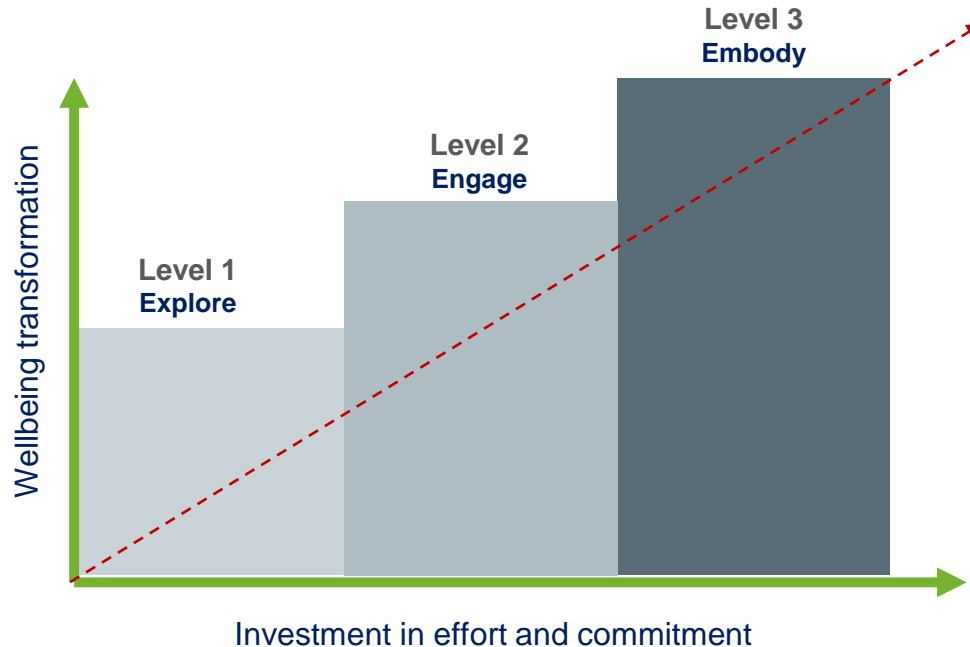
White Paper Draft Contents

Draft working definition
A Wellness Immersion is a curated experience stimulating an intentional exploration, engagement and embodiment of this awareness. An immersive experience supports the development of mind sets and skill sets to not just know or know how, but to *feel* this state of well-being, hopefully in a sustainable way.

1. **Context and needs**
   - Wellness societal trends, challenges and opportunities
   - Impact and opportunities for destination spas and integrated health resorts and wellness retreats
   - Immersive experiences defined
   - Overview of current immersive experiences, including strengths and limitations

2. **Doorways (Koshas) to well-being**
   - Describe Eastern, Western and indigenous approaches and common themes
   - Describe our proposed doorways to well-being
   - Defining each doorway in terms of desired or optimal state
   - Provide examples of practices and properties providing services for each doorway

3. **Maturity model**
   - Defining what explore, engage and embody mean and how this can impact the design of an immersive experience
   - Examples of practice per doorway to support the different maturity levels

4. **Designing sustainable behavioral change**
   - Best practices to support individual change
   - Proposed roadmap to support the individual transformation process
   - Implications and key success factors for property owners

5. **Developing a culture/ infrastructure to support a renewed sustainable offering**
   - Developing conscious leaders
   - Designing infrastructure
   - Creating a culture to support the desired client experience

Research Projects no.1- Well-being challenges and immersive experiences

1. **Context**
   o Well-being and immersive experiences are broad subjects and we need to best define them to guide the hospitality businesses (spas/properties) interested in improving the impact of their service offering in the wellness industry.

2. **Scope**
   o Describe trends and challenges in today's society as it relates to well-being
   o Summary of the hospitality and wellness industry's current approach to meet these needs
   o Describe our proposed definition of wellness immersive experiences as a strategy to address the well-being challenges

3. **Expected deliverable**
   o 5-10 pages with frameworks, diagrams and references when applicable

4. **Deadline**
   o End of April

5. **Proposed Sponsor**
   o Ulli Peck, supported by Nash Pushwani

Research Projects no.2- Well-being Models (Doorways)

1. **Context**
   - Well-being is defined through multiple lenses, with a history dating back to the earliest civilizations. Today, Eastern, Western and Indigenous communities are increasingly making their voices heard in our mainstream media and well-being offering
   - We believe that at the heart of all of these approaches, lies an overlapping appreciation of well-being key aspects, with multiples angles (or doorways) such as body, mind, energy levels, spirituality to name but a few of these.

2. **Scope**
   - Work alongside the immersion initiative team including pioneers in integrative and holistic medicine (MD PT and behavioral psychologist), designer/feng shui, research consultant, wellness tourism consultant and medical spa operators to:
   - Identify main well-being dimensions (ex.: Koshas) in Eastern, Western and Indigenous philosophies and practices
   - Identify what appears common to all (even if the language may differ), and what is distinctive to each
   - Identify a working model that appears inclusive and applicable to the design of immersive experiences
   - Provide examples of practices for each of these well-being dimensions (or doorways)

3. **Expected deliverable**
   - 10-20 pages with frameworks, diagrams and references when applicable

4. **Deadline**
   - End of April

5. **Proposed Sponsor**
   - Tracey Vincel supported by Nash Pushwani

Research Projects no.3- Sustainable Behavioral Change

1. **Context**
   o Well-being is something we all seek and the pathway to obtaining a healthier life is generally known to all. However, despite intent, engaging in sustainable behavioral change, even when it concerns one's health and well-being, is an elusive challenge
   o For anyone designing an immersive experience with the intent to improve well-being, it becomes critical to understand the underlying resistances to change or frictions points, the best practices to induce the behavioral change process, the strategies to unleash the discretionary effort that allows one to experiment a higher version of themselves in a sustainable way.

2. **Scope**
   o Work alongside the immersion initiative team including pioneers in integrative and holistic medicine (MD PT and behavioral psychologist), designer/feng shui, research consultant, wellness tourism consultant and medical spa operators to:
   o Summarize known barriers and friction points to induce and maintain behavioral and mindset change in the fields of health, wellbeing and spiritual realms
   o Identify key models that describe variables and roadmaps to unleash and sustain behavioral changes in the health, wellbeing and spiritual realms
   o Design or propose an integrated or holistic model that could be used by immersive experience architects and program developers to design impactful programs and experiences

3. **Expected deliverable**
   o 10-20 pages with frameworks, diagrams and references when applicable

4. **Deadline**
   o End of April

5. **Proposed Sponsor**
   o Carl Lemieux, supported by Malcolm

Appendix I

Initial description of Koshas and possible offering

The 5 Paths Defined

Physical BODY– all aspects of our physical body must be nourished and taken into account individual needs as well as the stage of life. The physical body manifests in no aches and pains, feeling of lightness, ability to withstand change, and sense of stability and ease.

Vital or Energy BODY– Our physiological functioning is affected by the flow of prana – life force energy along its 5 major currents: prana, apana, vyana, samana, and udana. The balanced flow of prana is reflected in organ function, sleep patterns, stress management and energy and vitality

Mind/Emotion or Mental BODY – the mind has tremendous power to influence the entire system; it needs to be educated and developed to direct and maintain attention, make educated choices, acquire knowledge and retrain information (memory)
.

Wisdom/Intuitive BODY – the wisdom body is formed based on the inherent tendencies and is affected by our experiences and conditioning. It has great potential for transformation to become more spiritual, intuitive, expressive/speaking our truth, loving, powerful/decisive, vital/creative and stable/secure. A means to make contact with ones deeper nature.
.

Bliss BODY– the dimension of the heart is the deepest and most profound. Through the heart we are able to connect to ourselves and relate to others and find joy and fulfillment. Ultimately it can become a source of conditioning happiness by connecting to something greater than ourselves. Its goal is to experience the vast multidimensionality of consciousness itself.
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Examples only: yet to be completed and refined

- Movement
  - aerobic
  - strength training
  - prevention screening
  - Yoga, Qu Gong, …

- Nutrition
- Sleep
- Appearance and aging
- Life style habits

- Nature and other sources of prana
- Breath awareness/techniques
- Chakra balancing
- Acupuncture

- Reiki
- Essential oils
- Feng shui

- Mindfulness training
- Meditation
- Emotional intelligence
- Stress/ resilience training

- Cognitive enhancement
- …

- Wisdom teachings
  - Vedic/Yogic
  - Taoist, Zen, Sufi
  - Egyptian Alchemy
  - Shamanism

- …

- Ritual
- Samadhi
- Creativity
- Play
- Laughter

- Sexual ecstasy tantra
  - Taoism
  - Tantric yoga
  - Tibetan buddhist tantra
  - Egyptian alchemy

Appendix II

**Possible Model to Support
behavioral Change**

Creating sustainable behavioral change requires a systems approach

The **Integral Model** developed by Ken Wilber is introduced to support sustainable behavioral change. The quadrants represent lenses to best understand motivation for change; they reveal dynamics and forces within individuals and the collectives. The integral model is used in this upcoming White Paper to map different and complementary practices to be considered when designing immersive experiences to support true behavioral change.
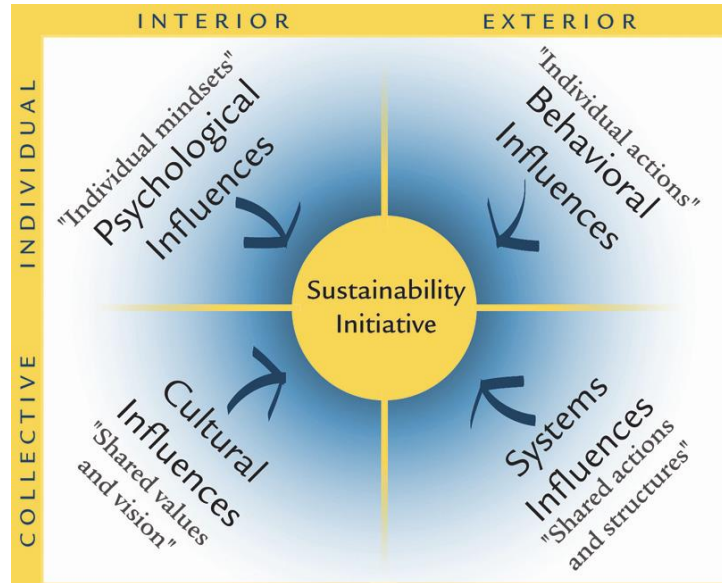
Designing a Transformative Experiences- The Integral Model

Behavioral change can arise by working with any one of these four lenses. Different people will have preferred quadrants to induce change. Strategies in all four quadrants however are usually required to successfully bring about sustainable change. Research shows that the most effective quadrant to start a change is with systems, or external support.

Internal   **Observable**

Individual

Shifting Beliefs
Mental models
- Purpose & values
- Interpretations/Understanding
- Engagement levels/Perceived urgency
- Self efficacy/Intrinsic motivation
- Antecedents/Past success or failures

Inducing behaviors
Degree of activation of bodily systems
- Actions/Physical activation
- Language/words used
- Felt emotions
- Our five senses

Collective

Acknowledging & Shaping Culture
Collective way of viewing the world
- Shared norms and Values
- Collective beliefs
- Implicit way of acting
- Informal expectations
- Degree of psychological safety
- Shared experiences and stories

Leveraging Systems
Visible systems and available resources
- Objectives and action plans
- Visible intent & Commitments
- Reward systems (Extrinsic)
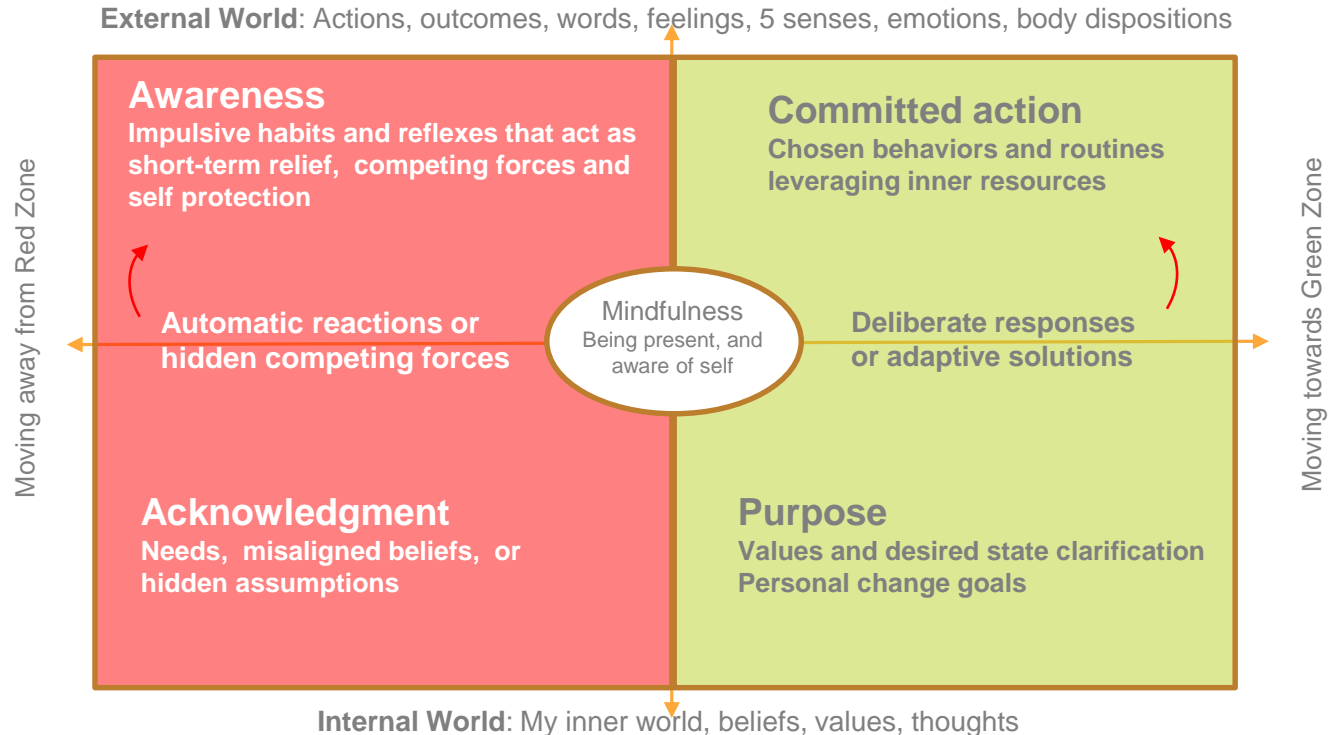- Physical infrastructures
- Technology

Source: Adapted from Ken
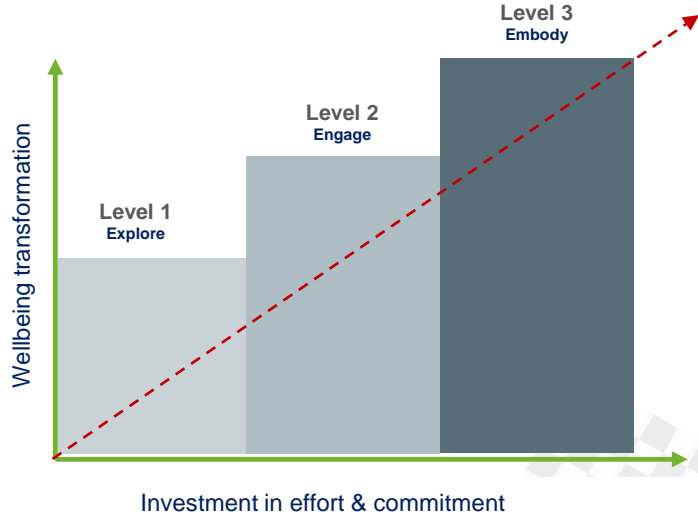Wilber's Integral Model

Understanding Individual Transformation- The ACT Model

To help individuals design their transformative journey, the *Acceptance* Commitment Training (ACT) model (Based in cognitive behavioral sciences) is an effective way to drive behavioral change. It focuses not only on what we really want but also what is keeping us from getting there. Our **immune system** (as described by Kegan 2009) that may have served us in the past, may also threaten our path to continued wellbeing, so this needs to be addressed in parallel to our intention and change direction.
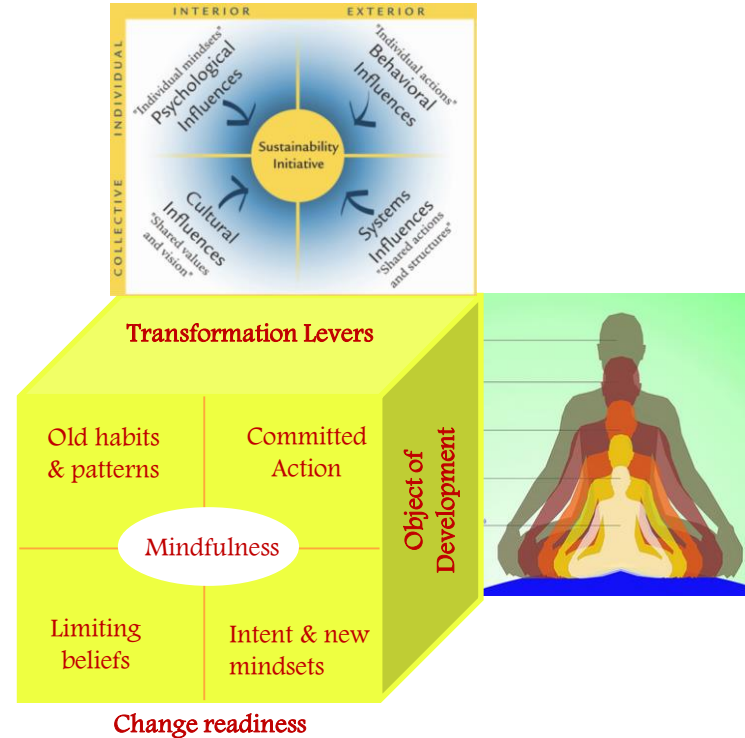
*We don't fear change as much as we fear being without defenses (*Kegan, 2009)

External World: Actions, outcomes, words, feelings, 5 senses, emotions, body dispositions

Moving away from Red Zone

Moving towards Green Zone

Awareness
Impulsive habits and reflexes that act as short-term relief, competing forces and self protection

Committed action
Chosen behaviors and routines leveraging inner resources

Automatic reactions or hidden competing forces

Mindfulness
Being present, and aware of self

Deliberate responses or adaptive solutions

Acknowledgment
Needs, misaligned beliefs, or hidden assumptions

Purpose
Values and desired state clarification Personal change goals

Internal World: My inner world, beliefs, values, thoughts

An Integrated Wellbeing Roadmap

Wellbeing transformation

Level 1
Explore

Level 2
Engage

Level 3
Embody

Investment in effort & commitment

Chosen Point of Entry

INTERIOR   EXTERIOR

INDIVIDUAL

"Individual mindsets"
Psychological
Influences

"Individual actions"
Behavioral
Influences

Sustainability
Initiative

Cultural
Influences
"Shared values
and vision"

Systems
Influences
"Shared actions
and structures"

COLLECTIVE

Transformation Levers

Old habits
& patterns

Committed
Action

Mindfulness

Limiting
beliefs

Intent & new
mindsets

**Object of
Development**

Change readiness

Wellbeing Roadmap

Key conditions need to be in place to foster development and sustainable change in behaviours. The table below is simply an exemple of what a roadmap could eventually look like. The actual steps need to be completed, refined and validated

CHARACTERISTIC		GENERAL RECOMMENDATIONS	SPECIFIC STRATEGIES
1. Create Safety	Development involves change which can cause anxiety in adult clients	• Create a safe climate for sharing ideas and taking risks • Create a learning group or tribe to share the journey • Inform clients early and often as to what will be occurring during the development session • Advise clients of any assessment expectations for the development session and provide choices	• Create a warm, safe, personalized and welcoming initial experience • Inform clients of the purpose, learning objectives, and agenda for the development program at beginning of the journey • Facilitate a collaborative process to create group norms or community agreements whenever possible • Provide opportunities for clients to work in pairs or small groups for support • Tell clients when, what, and how they will be expected to share with the group (and allow for people to forgo this expectation, if severely uncomfortable)
2. Leverage What is present	Adult clients come with a wide range of previous experiences, knowledge, interests, and abilities and they appreciate when their assets are recognized and utilized	• Leverage client's strengths and input to help achieve development goals • Design activities that accommodate diversities in needs, knowledge, development preferences, and ability • Leverage Peer learning whenever possible • Be prepared to be challenged in suggested ideas or approaches	• Ask clients what they most want to take away from the learning journey • Use questioning or inquire to draw session content from clients, whenever possible • Employ development approaches that target various development preferences (ie. visual, auditory, and kinaesthetic learners) • If challenged by a learner, decide whether to engage or ask to discuss privately at another time
3. Provide choice	Adult clients are self-directed and want to be actively involved in their development process	• Provide choices whenever possible • Talk less and engage clients more • Create opportunities for participant input and feedback • Move towards increasing the participant's responsibility in directing their own development	• Solicit client input in determining session structure and development activities, wherever possible • Ask clients to volunteer in roles such as note-taker, timekeeper, and discussion facilitator to further engagement • Solicit client feedback via informal or formal surveys throughout development session and at end of journey • Provide opportunities for clients to teach each other new content

Examples Only

Enhancing the Client Experience for Impact

CHARACTERISTIC	GENERAL RECOMMENDATIONS	SPECIFIC STRATEGIES
4. Discover your inner self Understanding our "immunity to change" unleashes new inner forces that facilitate the passage to towards our intent, values and best version of ourselves	• Create experiences that allow clients to quiet their minds and bodies to avoiding fight, flight or freeze automatic responses • Provide safe spaces for self discovery and exploration of thoughts, emotions and bodily sensations • Support the identifications of fears, limiting beliefs and concerns linked to behavioral change • Design activities that foster inquire and self-reflection	• Introduce formal meditative practices as well as movement based contemplative practices as yoga and Qi Gong • Provide opportunities and instructions for mindful practices such as mindful eating/drinking, mindful walking paths, mindful conversations and the like • Offer workshops, coaching sessions, peer learning on habit creation, limiting beliefs, fears, biases and personal barriers to growth and wellbeing
5. Commit to Action We go in the direction of our dominant thoughts. Confirming values, intent and effective actions are key to create momentum moving forward	• Translating client intent into desired evolving patterns of actions and behaviours • Using values and conscious/desired beliefs to set goals and specific actions • Providing support in setting realistic yet motivating goals and action • Identifying barriers to chosen actions and how to best deal with them	• Providing worksheets, video and other forms of support for the clarification of one's renewed or awaked values and beliefs • Provide clear instructions on how to best translate intent into objectives and actions • Providing clients with best practices and typical challenges linked to developing new habits and patterns • Providing a safe and nurturing environment where people can share their intent and commitment for valued living. if desired
6. Design Support The immersive experience is a critical step of a journey but real and sustainable change occurs in time as new patterns and behaviours take root	• Package the immersive experience as part of a transformative journey • Develop a sense of community that goes beyond the actual immersive experience • Facilitate communicate rituals and practices for easy access and sustainability, post immersive experience • Co-design follow-up initiatives and tailored programs to keep the learning and growth momentum	• Design support network, tools and systems with clients to facilitate adoption of desired outcomes • Develop roadmaps for next level of development, adaptable to individual needs and preferences • Set-up social media strategies or forums to connect individuals and provide support in time • Offer pre, post and on-going measurement some key metrics whenever possible

Appendix III

Research Review Findings

Best Practices per Integral Model Quadrants

This is only a sample as this table is to be completed with our literature review that has just begun. Each strategy would be supported by a Fact Sheet to support establishment choose the best portfolio of strategies as well as best practices and references to guide the implementation process.

	Internal drivers	External drivers
Individual	• Providing tailored actionable knowledge on health consequences linked to current and desired lifestyles – Ref x • Cognitive reframing – Ref x • Persuasive coaching – Ref x • Imaginal experiences or envisioning success – Ref x • Creating a positive emotional personal experience – Ref x • ….	• Behavioral practice/success and mastery experiences – Ref x • Combining several behavioral techniques – Ref. x • Constant behavioral feedback to increase self-efficacy- Ref x • Active problem solving strategies – Ref x • Motivational interviewing – Ref x • Enjoyable self structured activities – Ref x • Role playing and theater – Ref x • …
Collective	• Vicarious experiences- Observing success in peers – Ref x • Informal social networking to increase sharing and integration – Ref x • Support networks to nurture and facilitate long term behavioral change- Ref x • Creating a positive emotional group experience – Ref x • …	• Goal and action plan setting – Ref x • Adapting the physical environment to support desired behaviours – Ref x • Pre and post measurement on Self-efficacy and other key metrics- Ref x • Persuasive software/ gaming/behavioral change support systems – Ref x • Tailored wellness communications on mobile devices – Ref x • On-going and long term self- monitoring technologies – Ref x • Counselling/coaching programs/resources – Ref x • Joint planning systems – Ref x • Celebration and incentive systems- Ref x • Measurements and evaluation….