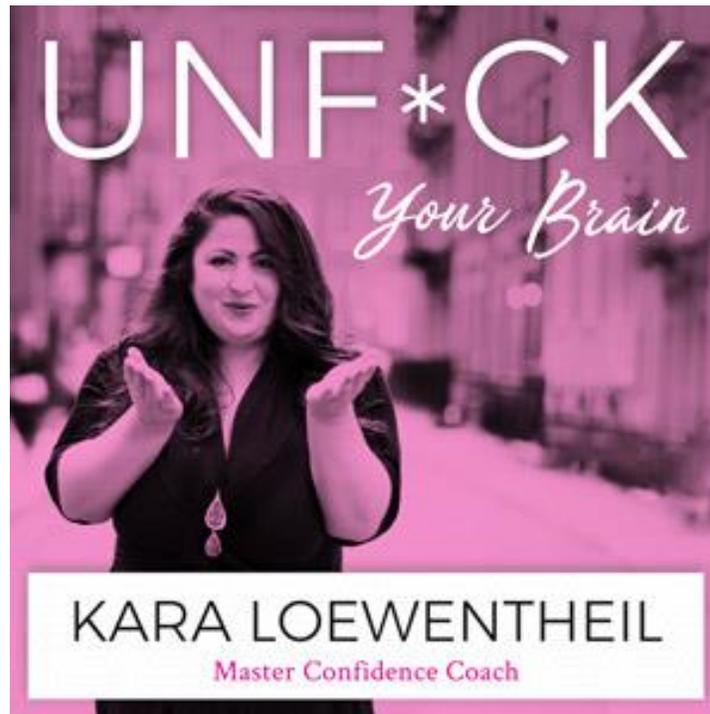


UFYB 226: Reviews, Retreats, and Managing People's Brains



Full Episode Transcript

With Your Host

Kara Loewentheil

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Welcome to *Unf*ck Your Brain*, the only podcast that teaches you how to use psychology, feminism, and coaching, to rewire your brain and get what you want in life. And now here's your host, Harvard Law School grad, feminist rockstar, and master coach, Kara Loewentheil.

Hello my chickens. How are we all doing with winter those of us who are in North America or I guess the northern hemisphere right now? It's very dark and my body descended from Lithuanian peasants definitely just wants to sleep literally all the time. I have never understood why people take time off in the summer. I mean I guess the idea is to go enjoy the beautiful weather but to me in the summer I feel pretty energized. My brain has lots of ideas, I actually want to be working.

And the time I really want to take off is in the winter when my brain and body think that we should basically be in bed 18 hours a day anyway. So, I'm trying that this year, trying to kind of mix things up and work a little bit more with my schedule. But one of the other things that often happens around the end of one year, beginning of another in our professional lives are things like annual reviews and staff retreats.

And so, I actually want to talk a little bit today about how I think about those things and what I have learned in my experience as a coach and an entrepreneur and sort of what my journey has been with putting together annual review processes and staff retreats.

Now, this may not sound super fascinating but it actually is whether you are a boss or not. Because whoever you are, whatever your professional situation is or even if you don't work outside the home this process of figuring out what is the best way to create these kind of conversations and experiences actually has very little to do with work in and of itself. And shockingly, mostly has to do with people's brains and how they think about the future and themselves and goals.

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So, you're going to want to listen and you're going to find this helpful I think, whether you work in a big corporation, whether you're in charge of someone else's reviews, whether you don't have any official employment, whether you're a solopreneur. But for sure if you are someone who has any say over other people's review processes or is ever designing staff meetings, or agendas, or retreats or whatever then definitely it's going to be for you.

So, I'm going to talk a little about this kind of chronologically because I want to tell you sort of the journey that I went on with this and what I found didn't work before I started figuring out what does work. So, when I first started hiring people I felt like I needed to do it the right way, perfectionism brain. But I had never really worked in a big corporation. I worked at non-profits some of which were fairly large. I worked at Planned Parenthood Federation of America which is the national planned parenthoods. So that was a big non-profit.

And then I worked at the Center for Reproductive Rights and I had clerked for a judge. But none of those were big corporations with very corporate processes of course. And then I was an academic and there was not really anybody in charge of me. And I was running a thinktank. So, I just had not had a very corporate experience. And so, I worked with an executive coach and I learned a lot of amazing things from my executive coach, was so helpful in terms of helping me get through the adjustment process of my first full-time hire which is very intense.

If you have a human brain you think it's just going to be awesome and amazing because finally someone can help you with stuff. But there's so much adjustment necessary for you to learn how to be a boss, and how to be a leader, and how to manage, and how to set correct expectations, and how to teach people how to do things. And it's a lot like what goes on in

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romantic relationships with just thinking once you find that person everything will be perfect.

And then realizing that that person is a person with their own thoughts and feelings and approaches and they can't read your mind. So, she was great for that. When we were talking about sort of doing reviews she recommended a pretty, I would call kind of mainstream process. It was you should identify their KPIs which are Key Performance Indicators. And there should be whatever it is, four to six KPIs. And then you should track those over the year.

And then you have a numerical rating scale for their KPIs. And then you do their evaluation based on that. Or you would evaluate their bonus based on that. Or in my business we don't do bonuses, we do profit sharing. And that's actually standard so that's not related to performance. But you would evaluate their raise or their promotion, anyway, so was sort of was very like identify their KPIs, track them, use this kind of numerical evaluation system. And so, the self-review and the manager review that I put together, we're really focused on that.

So, we did it that way for about a year, maybe 18 months. We went through to or three six month review cycles where we had the KPIs and we tracked them. And then the reviews were all about how did they do on their KPIs. And I just fucking hated it. I hated it. They hated it. It just felt so kind of antithetical to what I think produces good work. And the kind of spirit and the sort of value, and mission, and just culture of my business it felt very corporate. It felt very kind of both restrictive, too much work and not enough value.

It felt very labor and energy intensive and yet it wasn't really telling me very much. And to some extent it felt like I was spending a lot of time confirming that people were doing the basic parts of their jobs which I just expect that

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people are doing a business of my size. I will notice way before review time if you have not been doing them. So, it just felt like my employees I had by the time I decided to change that process, I had two employees. They didn't like filling them out. I didn't like filling it out as their manager.

One of my employees matched the other, she didn't like it in either way as an employee, as a manager. So last year I sort of decided that I had given this a real try and I was going to try to do this way. And I was just going to try to write a review from the way that I think about people and work. And so, I completely redid it and I wrote my own two reviews, one is for an employee to review themselves. And one is for a manager to review their employees, their direct reports.

And it's a very life coach review process. It for sure gives people a chance to talk about what they did the previous, you know, what they're proud in the past review cycle, what they accomplished. And we still set goals. So, it asks them to report back on did they achieve the goals that we set at the last review and why or why not? And what else amazing shit did they do that was on top of that? But then I asked them things like what are you happy with in your role? What would you change in your role if you could? What do you think we should start doing and stop doing, or keep doing?

And then I asked them, where do you see yourself going in your role? What is your vision for how you can contribute to the mission and the company going forward? What is your vision and goal for yourself as a professional, as a person in your role, as a contributor to the business? It really asks people to do bigger picture thinking about not just did I check these boxes on my KPIs that somebody else gave to me? But what kind of contribution am I making to the shared purpose of this business? What kind of role do I want to have? Who do I want to grow into?

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The question now requires them to think about who is that person they want to grow into professionally? How do they get there? And then I ask them what their manager can do to support their growth in getting to become that person? So, it really creates a structure for people to access thinking about their future selves and setting those goals. And it's been really a fascinating experience to go through this with employees because some people are already thinking that way especially if they're super into coaching.

Some people are not thinking that way at all. Some people have never been asked, "Well, where do you want to go? Who do you want to become? What is your one year, three year, five year goal for yourself in your career?" It has really been an opportunity for some of my employees to take themselves more seriously, take their growth more seriously. And that has been my feedback to some of them.

There have been some reviews why essentially my entire feedback was, "Hey, I want you to take yourself, and your dreams, and your professional life seriously. Think about who you want to become in this business? What do you want to grow into? How can we support you to do that?" Don't just sort of float along because part of what I think gets lost in a lot of kind of performance reviews is that the biggest thing that holds people back in productivity, and creativity, and strategic thinking is their low self-esteem.

And sometimes that's obvious, they have a lot of negative thoughts about themselves. And sometimes it is really kind of in the background especially if they feel kind of generally content with life but they just don't think of themselves as someone who is important to the business, or has a lot to offer, or whatever else. So, to me what good does it do me to track and monitor people's KPIs very carefully if I am not really engaging with them on the thinking that is driving their behavior and their approach to the business of themselves?

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And so, I have taken that same approach when I put together staff retreats. The first time I did a staff retreat which was two years ago because of COVID and I only had two employees. And it was sort of much more like, okay, we got together. Here's what we're going to do this year. Let's do a calendar for it. It was very tactical which is totally fine. But when I did a staff retreat again this year and with now 10 employees or I actually don't remember exactly how many we had right at that moment of the retreat but it was 9 or 10.

It was really not focused on what's the concrete calendar or spelling out exactly what we're going to do. It was really focused on the big picture. So, we spent a day talking about the big picture of the business, what were our goals for the next year? The point of something like a KPI is so that people know what's expected of them and you have a more standard way to evaluate people and their performance. So, it's not just women whimsy. So, people know what they're supposed to be doing.

And of course, I teach as a coach that having concrete structured goals is very important. We don't just say, "I want to make some money in my business." We've got to pick an amount, and a date, and all of that. So, it's not to say when I say, "Well, we moved away from this very formalized detailed KPI structure", it's not like we're like, "There are no goals, do whatever you want." But I want people really focused on what are our big picture goals in the business?

Of course, everyone needs to know what their role is and how they contribute. But part of the problem with having a top down approach to that where you just tell people exactly what their job is and how they contribute is that you aren't inviting people to step up to the plate and to think creatively about what they can offer and add. So, the first day we set the big business goals and I coached and talked about what those big business

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goals were for next year. So that we are all moving driving towards two to three core objectives. So, we are not just willy-nilly all over the place.

One of the things I really talked to my team a lot about this year was the idea that everything we're doing in the business needs to be bringing us closer to one of those goals. And I talked a lot about conceptualizing their job and the decisions they make in light of those goals. The biggest thing that I think drains energy from collective achievement is when we just see each of our jobs as this independent little cell that just carries out its little exercises and has its little function. But we don't ever stop, and think, and connect it to the big picture.

And what came out of that was that there's so much thought work needed probably especially because my team is women, right now happens to be all women. And also, because we prioritize diversity, and inclusivity, and hiring from traditionally marginalized groups in our hiring process. And so, people have internalized a ton of messages from society that they don't matter, and they aren't leaders, and their work isn't important, and it's not good enough. And they have to constantly earn approval. And they have to constantly show their worthwhile and that they're good enough.

And so, when I'm running a business and all of the people doing the business have these thoughts I'm obviously not getting their best work and they're not having as much fun as they could be having. And they're not thinking as creatively as they could be. And they are not up-leveling the way they could be if all of their thinking is that they have to prove themselves all the time, or they're not good enough, or their job doesn't matter. So many of my team members had this thought that their specific job doesn't really matter so much to the business.

And as I said to them, as if I had just hired them all as a charity project. So, this is the kind of stuff that is what holds people back. And it doesn't get

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turned up when you do a very standard review process that doesn't talk about people's thoughts and feelings.

So, day one we did the big picture objectives and then we did a lot of coaching about how does your job relate to those big picture objectives? What do you do that's crucial to achieving them? And kind of turning up all the stones and seeing all the little thought worms wriggling around about how they don't matter, they aren't good enough, their job isn't really that important. We don't really need it. It's not that hard. All of those thoughts.

And then the second day we really worked on an impossible goal for them in the business. And that's where I wanted to really activate their thinking about themselves and what kind of role they're capable of achieving. What kind of professional success or accomplishment would really blow their mind and would feel they had done something impossible that required them to become someone else? To sort up-level their self-conception and their identity and do something they didn't believe they could do.

And so, we spent that whole second day, we also did some fun stuff. We had a chocolate tasting and we sent everyone to a spa and that kind of stuff. But in terms of the content that we did for the retreat we really focused on in your role what is your impossible goal? So, for some of my part-time people their impossible goals turned out to be they wanted to become full-time. They wanted to become the director of their department or whatever.

So super important as someone who teaches women and people from marginalized identities how to undo socialization to see that we have been socialized to believe that we should just keep our head down and do a good job. And someone will come reward us, someone will come and validate us. Rather than thinking, yeah, I want to be the director of this

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department. Now, what kind of amazing ideas can I come up with to make that a no brainer?

One of the things I talked to them about was the idea that if they set an impossible goal for themselves then they are going to think about how to achieve it. Then they are going to try to grow into that person. And they are going to become someone who creates and contributes so much value to the business that when they come to me and say, "Hey, listen, I want to be made full-time and I want to be the director of this department and here's why. Here's all the ideas I've come up with for what this department can be doing that's going to advance the business towards its goals.

Here's all the value I've added. Here's all the ways that I'm going to be able to make this even better." Then it's a no brainer for me. It was very important that they learn to think about who they want to become in their role or what role they want to have. What kind of thought work they need to do to get themselves there. And if they need some kind of training, what kind of training do they need? And pitch me for that kind of training. If they need other resources, what are those? Pitch me for those.

So really try to encourage a culture in which people are setting big goals for themselves in their roles and are doing the thought work on all of the kind of imposter syndrome and minimizing thoughts that get in the way. So, my overall structure for a staff retreat was we did about three hours in the morning. That was, the first day was the big picture of the business, what are the big picture goals? And then I had them go through exercises like it was a coaching a workshop of how their job relates to those goals. And then coaching on all the thoughts came up around that.

And then we had, in the afternoon we had a fun activity. We did a chocolate tasting. And then the next morning we did another three hours. And that was about their kind of personal journey in their professional role in the

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business and what their impossible goal was for themselves and how that would contribute to the business. And what kind of thought work they would need to do to become that person. And they had impossible goals for the year so it's what they would do in the year.

And then in the afternoon we sent people off to get spa treatments. And we sent them nice lunches both days. So, it's a mix. I think the best structure is a mix of some deep thought work and big picture stuff. And then some pleasure. But I think the most important takeaway however you structure yours is that you are accessing this area which is what are people's thoughts about the business and their role in the business?

And what are their thoughts about themselves and their identity as a worker, or as a professional, or as a staff member, as a manager, whatever role they have in the business? Because those are the thoughts that are driving their performance. And those are the thoughts that are either going to be boosting or limiting their creativity, their engagement, their productivity, their efficiency. The way that people can show up to be part of a group mission like a business is completely based on their thinking.

And so, any kind of process that doesn't take account of that is really not getting to the heart of the matter. So, having set those big picture business goals and then having set those impossible goals for each person in their role, now we have this framework for what are we working on and evaluating as we go along?

So rather than it feeling like it's the sort of job description chopped up into KPIs in this disconnected way, what we will be kind of measuring, and tracking, and evaluating, and supporting, and mentoring the employees in are how are we doing on reaching these big picture business goals? How are we doing on your part of the work and how it contributes to those big picture business goals?

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And then how are we doing on your impossible goal? And so, people's managers will also be supporting them and checking in with them on those, on your impossible goal for yourself in your role, how is that going? And getting coaching on that. So, it gives us a framework and a structure both for what are the big picture business goals, but also for each person's professional development. And it gives each person a way to focus on up-leveling their thought work about themselves as whatever their role is, whatever role they want to be throughout the year.

So that is my take on how we handle reviews and staff retreats with the sort of core insight being that people's thoughts are what determine a lot of their performance and a lot of the business's ability to meet its goals and objectives. And I think especially if you are the vision person like I am, if you're the founder, or the entrepreneur, or the CEO, or the whatever you can get very used to being the person who sort of carries and moves towards that vision. And it can often feel like you're the one doing that and everybody else is just doing what's assigned to them.

But I think it's really important to get everybody bought into that project and you would be surprised how often people are not bought into the project, not because they don't want to do a good job or because they don't care. But because of self-limiting beliefs and because of sort of insecurity and unworthiness stuff about their kind of power, and how much they matter and whether what they do matters.

And so, helping people uncover and work through that and encouraging them to set big goals for themselves and to really connect to the big goals for the business is what's going to help up-level their thinking. So that they are better in their roles and also just happier as humans which is my goal for all of my employees. Once again, it all comes down to your thoughts.

Have a beautiful week my chickens. I will talk to you again soon.

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