**Performance Journaling a WIN**

**Helping a Valuable Employee Overcome a Career-Limiting Habit**

Hi All,

A client from another class kindly agreed to let me share with you a case example of extended Performance Journaling. After the Performance Journal example are two sections providing additional commentary for those of you who are ready to explore the deeper implications of game-filming for leadership. I suggest you treat this additional commentary as a “bonus supplement” rather than a typical posting (you may be frustrated if you try to absorb it off your iPhone with a quick scan.)

**WHY PERFORMANCE JOURNAL A WIN?**

Sometimes we identify an issue that is worth extra effort to Game-Film because making progress on it will be very significant. We may Performance Journal such a pattern many times between first identifying it and thoroughly working it out. When we notice that we have taken a significant step in the right direction it can be very helpful to anchor that WIN with an extended version of Performance Journaling. This will answer questions such as, *“What just happened? What part did I play in getting this to happen? How can I repeat this success in the future?”*

What follows comes out of my notes from a coaching conversation with this ILP client. These aren’t exact quotes in all cases, but the client agrees the essence is preserved. As is often the case, we hopped all around during the conversation but ended up covering all the bases (as we like to say about using the PJ form, *start anywhere – go everywhere*).

**AN EXTENDED PERFORMANCE JOURNAL**

**Situation**

“One of my managers gets defensive very easily. It happened again when I introduced the 2x2 practice. He is a hard working and productive guy BUT he has a bad habit. He tends to assume I am criticizing him whenever I introduce something new, or make a suggestion about how best to proceed (never mind actually giving him negative feedback!) For example, he felt that I was introducing the 2x2 because I think he is doing a bad job and needs to be micro-managed. Although I said very clearly up front that the purpose of the 2x2 is to help all of us get aligned on our priorities , he simply couldn’t hear this (at first).

In a conversation last week I took the risk of going beyond content to talk about the PROCESS of how we talk and relate to each other. I pointed out that he tends to get defensive and make negative assumptions about my intent pretty easily. This time - he got it!

**Results**

“This is a BREAKTHROUGH for us… I feel relieved and back from ‘the edge’ of considering making a personnel change.

**My Thoughts**

At first…

*“Oh no! There he goes again! We have to fix this. Despite his hard work and competence, I’m not sure I can continue to work with him – the interpersonal stuff is causing such a drag on my energy, and blocking progress… He’s got to get over this if we are going to continue…”*

After shifting focus…

*What I want is for him to be aware of how his behavior impacts me and others, and see that it is causing him a big problem. I want him to see he doesn’t have to react that way, and that he can respond differently. I want him to get it that I see him as very valuable and that when I introduce a new tool or offer suggestions it is a positive thing, that it means I am investing in him because I see he has so much potential…*

**My Inner State**

“At first, I was feeling Victimized and frustrated by how difficult it is to introduce new things or give him feedback… I felt trapped. When I say nothing about it I feel Victimized. My other choice seems to be to burst into Persecuting him for being so damned ***defensive***! (Of course neither has worked well…)

So I tried hard to shift my focus (FISBE) to what I WANT in our working relationship and to speak to that.

**My Behavior**

“I have been practicing Ongoing Regard with him to build up our ‘relationship account’ enough to have this difficult conversation about the impact of his behavior on me and the team. This time I was able to contain my frustration and shift my focus. Instead of shutting up and stewing or making it worse by attacking him for being so damned defensive, I led our conversation in a Creator mood.

**My Mindset**

“First I felt Victimized. I wanted to switch into Persecutor (I hate being the Victim). But instead I was able to shift into the Creator orientation and coach and challenge him.

**Key Insights**

* I am relieved and much more at ease for having gotten to a candid conversation with him about my concerns. I see that the way he assumes a negative intention on my part is a ‘knee jerk reaction’ for him rather than an conscious choice. This is connected to what he shared with me about issues he has with his dad, and that he looks to me as a mentor…
* Getting us past this won’t happen because of one great conversation. Maintaining trust and a ‘positive relationship account’ will be very important so that he will remain open to my challenge and coaching.

**Desired Outcome**

* I have shifted our way of interaction permanently.
* I have kept a highly valuable employee without having to settle for me and the team continuing to be so negatively impacted by an interpersonal blind spot.
* I have used this one situation as an opportunity to enhance my skills as a leader / coach / challenger.

**Actions**

* I will look for opportunities to give him Ongoing Regard for his strong performance rather than taking it for granted. This will help keep our ‘relationship account’ in the black and help him trust me enough to keep being coached and challenged.
* To cultivate the new habit I will watch for any small steps he is taking to act in this newly open and non-defensive way and immediately let him know how it positively impacts me and others. This will help keep his FISBE focus on what he wants (to be a valued high performer) rather than getting lost in the Drama Triangle script of interpreting every suggestion as a Persecution.
* I will challenge him when necessary – *“Stop! We are getting into that old Drama. Let’s take a breath and Recalibrate.”*

**TRANSFERENCE AND PROJECTION IN RELATIONSHIPS WITH LEADERS**

It is likely that most of you have worked with at least one individual who makes a great contribution but triggers so much unnecessary Drama that you start to feel continuing to work with them may simply not be worth it. Sometimes this drama arises because the employee has a habit that is triggered specifically in relationship with authority figures. Business culture doesn’t have a robust mental model to help you recognize and skillfully relate to this phenomenon, but it is worth understanding because it is actually quite common. In my first profession (being a psychotherapist and then teaching others) we learned to be alert to a client “projecting” inaccurate expectations onto us. Idealizing and devaluing are the two ever-present polar opposites. Through experiences in early life with authority figures such as parents and teachers, we all develop an internal mental schema of what authorities (people with power over us) are like, how they see us, what they want, and how to cope with them. We then use this schema to predict the behavior of important people in our lives (like bosses). The technical term for this is “**transference**”. Transference in the broadest sense is just the way we bring learning from previous situations into the present and attempt to manage important relationships. But transference can cause serious problems when it significantly distorts a person’s perception (e.g., *‘I should be careful not to let my boss see that I made an error, or she’ll never trust me again…”*). The Performance Journal I did with This ILP participant is a good example of how this dynamic can play out in a workplace relationship.

We all have this tendency to transfer past experiences into current relationships without being fully aware of how our assumptions color our perceptions. Especially when old fears and unresolved anger is triggered, the effect of transference can be so strong that we filter out obvious sensory data that would disconfirm our guesses about what is happening. Our mind’s projection of what ‘people like this’ are like can be so vivid that we substitute this mental schema for the reality of the person right in front of us. It is not hard to see this mechanism at work on the grand scale, for example when opposing political factions see one action by the President of the United States as indicative of exactly opposite motives. But it is just as common in every day organizational life, and just as potentially destructive. To put it bluntly:

* People bring to work unconscious assumptions and expectations about how leaders will (and should) behave
* Sometimes these expectations and assumptions are wildly inaccurate relative to current reality, either in the direction of being startlingly negative or wildly idealizing
* The function of our strongest unconscious beliefs is to protect us from being hurt by something that hurt us earlier in life. Such defensive habits can be very scary and difficult for people to become aware of and release
* If you are a leader, you will deal with transference and projection. So you might as well learn to recognize and respond skillfully to these dynamics

Like many high achievers, the man This ILP participant and I talked about on that call had a dad who tried to love him by constantly pointing out what he could do better *(“This is connected to what he shared with me about issues he has with his dad, and that he looks to me as a mentor…”)* Kids sometimes receive messages parent do not consciously intend to send, and come to conclusions that they carry far past the situations in which they may have been a useful coping strategy. In this case the ‘old tapes’ that he plays subconsciously may go something like – “*No matter what I do it will never be good enough for (Dad) to love and respect me… People will control every little thing you do if you don’t fight back….”* It is pretty common to have these kinds of assumptions and automatic reactive thoughts as a left over from family-of-origin dynamics. Until a person becomes aware of them, and makes an effort to update them, such assumptions will create a pre-disposition to see all authority figures as Persecutors, to be easily triggered into defensiveness and anger, to be ‘coercion sensitive’, and to obsessively pursue perfection.

It will take some practice for this man to develop stable access to the more accurate perception of what’s going on interpersonally that he glimpsed in the conversation the Performance Journal depicts. This ILP participant will probably have to help him repeatedly notice and name his conditioned tendency, as it arises. What’s more, he’ll have to try and do this without triggering the Drama Triangle script of Persecutor / Victim (the ever present slippery slope). Eventually, if all goes well, this man will be reliably able to respond realistically to performance feedback rather than fall into his old habit of assuming he is being criticized (and that criticism = negation). Because he is a very valuable employee it is worth making a considerable investment to help him change so that he can continue in his position (or even advance). But with such things there is no guarantee how much progress will be made, or how much investment will be required. At some point it may be necessary to recognize that sufficient change is not attainable, or that the investment required is beyond what is a reasonable and good faith effort in the workplace.

Nonetheless, coaching and challenging a highly valuable employee to change a destructive relational habit is always worth considering. Not every person is ready, willing and able to change in the ways that their organization may require – but every normal adult does have the ability to do some basic Game-Filming. With guidance it is possible to turn attention to our own thinking and write it down (as in Performance Journaling) or report it accurately to another person (as in coaching or mentoring or counseling). That is step one. The harder and often times more anxiety-provoking step is to authentically question whether the thoughts that arise in our mind are complete and accurate depictions of reality – if what we think is 100% true. Most of us require some support and challenge to do much of this. That support can come in the form of a skillful and compassionate boss.

**THE TRUE DEPTHS OF GAME-FILMING**

Human beings make choices and take actions NOT on the basis not of Reality itself – but on the basis of what we **believe** Reality to be. Persistent and in-depth Game-Filming can free us from limiting beliefs that are operating reactively and automatically. We can stop ‘fighting the last war,’ using coping strategies that made sense earlier in our life, but are no longer optimal. Usually our old subconscious assumptions are not flat wrong, they are simply too rigid. Simply by asking ourselves – *“Is my story about what is happening here 100% true?”* we can dramatically expand our perspective. New data becomes visible. New perceptions and new options for action appear. Through practice over time we strengthen our ability to think about our thinking. It is useful (and courageous) to regularly remind ourselves: *“this aspect of the world may not be just as I believe it to be – perhaps it just looks that way because of what data I am noticing, and how I interpret it using my old assumptions*.”

Overcoming limiting habits of thought is what we mean when we talk about shifting from Subject to Object. This man in this Performance Journal was Subject to a subconscious belief – *“You are never satisfied with my efforts.”* During the conversation This ILP participant and I game-filmed, this assumption became an Object of his awareness. Obviously, this process of liberation from unconsciously formed assumptions is especially important when a belief is distorted, leads to unskillful behavior, or is otherwise harmful or limiting. Performance Journaling and other game-filming techniques are ways to notice when we have been wearing *‘problem-colored glasses.’* We can’t remove a distorting lens until we realize we have been wearing it to begin with. Once thinking about our thinking becomes a habit, we enjoy a new level of freedom and creativity.

This dynamic is what we are pointing to with the term Self-Authorship. When our beliefs are Socially Defined we have not consciously chosen them. We are subject to and seeing through our thinking, rather than ‘writing our own script.’ Another way to put this is: an assumption does not “have me” so long as I remain aware, *“I have this assumption.”*  To become fully Self-Authoring, we have to dedicate ourselves to reflection and contemplation, to practices that help us release the hold exerted on our attention by the continuous stream of new thinking that arises automatically in our brains. The work of David Emerald (Escaping the Drama Triangle) emphasizes building our capacity to shift the focus of our attention When we are focusing on problems we are much more prone to falling into fear based assumptions from early life. We tend to narrow our perception to what can hurt us, and to behave reactively and automatically – attacking seeming threats, grasping after apparent security, and ignoring everything that seems irrelevant to ‘my survival.’ Such unthinking reactivity is appropriate for fewer and fewer situations as you rise through levels of increasing leadership responsibility.

To be fully effective leaders, we have to go beyond shifting our own mindset. We have to build our skill in helping others release the Victim orientation (problem focused, stuck in defensive reactions and fear based thought patterns) and choose a Creator orientation (focusing on purpose, values, desired outcomes and using deliberately chosen patterns of thought). The best news of all is that in every waking moment we have this option. It may be very difficult, but as people like Dr. Viktor Frankl (the holocaust survivor and author of Man’s Search for Meaning) demonstrates, even in extreme situations we retain the ability to choose our attitude. Although the old grooves in our brains may never disappear, together we can strengthen our awareness and build alternate pathways to a better future.