

SHE SAID/SHE SAID PODCAST WITH LAURA COX KAPLAN

EPISODE 295

GUEST:

BONNIE WAN, author "The Life Brief"

SHOW OPEN:

Laura Cox Kaplan [00:00:07]:

Hi, I'm Laura Cox Kaplan. Welcome to she said, she said podcast. Here on this podcast, we talk about the building blocks and the microhabits that help us create real and lasting influence. What do I mean by that? Well, we're talking about the kind of influence that helps you achieve your goals and whatever it is in life that you want to accomplish. But perhaps most importantly, it's the type of influence that helps you create real impact and that enables you to truly thrive.

EPISODE 295 OPEN:

Hey friend, welcome to episode 295 of she said she said podcast. I don't know about you, but I am super excited for summer and especially for the opportunity to kind of slow down just a little bit and spend some time thinking about and reflecting on where I want to go and thinking about this podcast and thinking about what we've learned over the past six months this year. So it's one of many reasons why I was really excited to bring you today's conversation, because it gives us a roadmap of sorts to kind of do a deep dive into introspection.

Laura Cox Kaplan [00:01:29]:

So just imagine being at a crossroads and knowing that something needs to change. But frustratingly, you're just not sure where to begin. In fact, sometimes knowing right where to start and finding the path to figure it out is often the most difficult part. Now, if this resonates with you at all, I think you're going to get so much value from today's conversation and specifically the tools that we discuss. I am joined by the fabulous Bonnie Wan. She is a celebrated advertising strategist, and she is the brilliant mind behind the life brief. Life brief is also the title of her terrific book. Bonnie's life brief approach was actually something that she adapted from a tool that she used at work that's called the creative brief.

Laura Cox Kaplan [00:02:20]:

And if any of you are in creative fields, you probably are already familiar with this particular tool. But how Bonnie connected those dots is a really inspiring part of her story and of this conversation. Now, Bonnie walks us through what led her to develop this tool or to recognize that the creative brief could be used for this purpose. And then she talks about the three part process that she created that's related. You will also learn in this conversation how embracing vulnerability and identifying those meaningful distractions, let's face it, we all have them, right? And then adopting consistent practices, even really, really small one, that's a point that small ones, rather, that's a point that Bonnie emphasizes over and over again that can be so important to help unlock a clearer path, ultimately toward your bigger goals. Now, one aspect of our conversation that I found particularly interesting is Bonnie's advice for revisiting and adjusting

the life brief as we go and as we change and evolve in our lives and careers. I don't know about you, but I have certainly been guilty of not anticipating how much I would change and evolve, and I haven't always planned as well as I could have for that growth and evolution. And while we may not know exactly how we're going to evolve, obviously we don't, right? But at least assuming that we will, or planning for that inevitability, I think is really, really important.

Laura Cox Kaplan [00:03:59]:

Anyway, I think that is why Bonnie's approach resonated so much with me, and it's why I think it can be such a powerful tool for guiding and helping you navigate life's transitions. In the conversation, you will also hear Bonnie's perspective on how our inherited stories shape us, how those things, the the narratives that your family has told you, perhaps can inform the way that you approach different juncture points in your life, and then how we can ultimately reframe these narratives to create new possibilities for our future. So whether you're looking to maybe redefine your professional trajectory or enhance your relationships or gain a clear understanding of some of your deeper desires, Bonnie's life brief offers a pathway to achieve just that. And as she emphasizes in our conversation, you do not have to quit your job just because you are in the midst of sort of feeling like maybe it's not working for you anymore. And I think that's a really important data point. In any event, here is episode 295, my conversation with life brief author Bonnie Wan.

Laura Cox Kaplan [00:05:11]:

Enjoy.

EPISODE 295 CONVERSATION:

Laura Cox Kaplan [00:05:13]:

Bonnie, welcome to she said, she said.

Bonnie Wan [00:05:17]:

Laura, thank you for having me. It's a joy to be here.

Laura Cox Kaplan [00:05:20]:

Well, I'm thrilled to have you. I love your book, the life brief. Of course, I was introduced to the book and to you by the amazing Fran Hauser. So a big shout out to Fran for connecting us or just putting you, putting you on my radar. So I'm really, really happy to meet you. So let's jump in to the book, and for the purposes of my listener, let's level set. What are we talking about when you talk about this concept of a life brief?

Bonnie Wan [00:05:54]:

Well, I'm a 30 year strategist in advertising, and so what I do with companies is help them get crystal clear about who they are and their biggest ambitions, where they want to go, and it's all distilled in a single minded, single page document called a creative brief. And the life brief is essentially a creative brief for your life. Now, it doesn't look like the kind of creative briefs we use in business, creative and innovation companies use, but it does the same practice of getting

messy, generating all the data, ingredients, and research about a part of your life that really matters or is gripping you right here, right now. And it distills it down to a inspirational, motivating, action driving clarity that propels you into change.

Laura Cox Kaplan [00:06:53]:

I love that. I was so intrigued by the fact that you've used this concept that you used in business for all these years and that you found a way to retool that for personal and professional sort of growth and development, if you will. But let's talk about the journey that led you there, because I think it's probably safe to say that was more not entirely obvious to you right away. You went on a journey to put the pieces together. Let's talk about what happened.

Bonnie Wan [00:07:26]:

It definitely came up organically and spontaneously in a moment of despair. I call it the dark chapter of my marriage. It was in 2010. I was the mom of three. Now I'm the mom of four. That's why I say that was. But my kids were. I had three kids under the age of five, and I was.

Bonnie Wan [00:07:48]:

My career was taking off. I was in a marriage, and we were in the chaos and throes of young parenting. We weren't necessarily young in age, but it was those early stages, and we were figuring it out. It felt like building the plane as we were flying it. And I was the sole breadwinner at that time. I still am, and at that time, also the full time restaurant and chef, head of housekeeping, head of playdate planning, all the things that come with new parenting. And I was frustrated. I was really bitter.

Bonnie Wan [00:08:27]:

I felt like I was taking on an unfair share of the load. I know a lot of women who feel this way. I was also exhausted. So that colored how I was seeing things. And I was critical on myself and also my husband. We seemed to be arguing at every turn, and I was just lost and in a ditch of what am I doing? Can I hold all of this up? And the story in my head was that my marriage was broken, that I had married the wrong partner, and that I maybe couldn't hold it all together. And as a reflex, in my darkest hour, I took a trip back to my childhood home, stayed with my parents, and I thought that that would give me some calm and reflection. But the questions kept resurfacing and circling until I had a reflex to do what my strategy approach is, which is write it all down, take notes, collect the data, collect the ingredients of what's really going on.

Bonnie Wan [00:09:38]:

So I just scribbled madly and gave myself total permission to be nakedly honest. And the driving question for me was, what do I want? What do I really, really want? Not what do my parents want for me? What does my husband expect? What do my children need? But what do I want in my heart of hearts? And what I've learned since, and I learned before as a strategist, that when we capture it in writing, we collect our ingredients. We can then return to it with curiosity and look at it with fresh eyes or a beginner's mind. And when I did that, I noticed a different story come out on the page, which is not that my marriage was broken, but that my relationship with

time was broken.

Laura Cox Kaplan [00:10:27]:

Wow.

Bonnie Wan [00:10:29]:

Bending and spilling my time instead of investing it in the people and the things that matter most. And as soon as I got that insight, as soon as I could see that automatically and instantaneously, my attention shifted to, okay, how do I solve this problem? It redirected me from, oh, woe is me. My marriage is broken, my husband is to blame. To. Wait a second. How do I reimagine how we spend our time? And that became the journey of getting clear and the road to our first life brief, which ended up being named take our time. And it had two meanings. Take back our time, be conscious about it, be intentional, and slow the heck down.

Bonnie Wan [00:11:20]:

I was doing so many things out of habit, out of obligation, saying yes when I should have said no, and it left me exhausted and empty at the end of the day, when it came to being with my husband. And I realized I wanted more time, not less time with my husband, but more meaningful time. Less time arguing, negotiating, debating. Yeah.

Laura Cox Kaplan [00:11:44]:

So when you came back, you had taken a trip. You were in your childhood bedroom. You talk about this in the books. I don't want to give too, too much away. But you called him up, and he was like, yes. And he responded right away. I'm curious. Like, once you put this together as a life brief, what was his reaction? Was he on board immediately? Did he get it immediately? Maybe talk us through what happened next?

Bonnie Wan [00:12:10]:

So when I sent the first life brief to my husband, I just thought we would have to negotiate it. I have to persuade him. But he wrote back immediately, y e s, triple exclamation mark. And that was the first moment of alignment and therefore hope that maybe we could take a different direction. And we got on the phone, and we were in an excited state that we hadn't been in it felt like co creation again, which was in the early part of our marriage, but we hadn't experienced it for probably a year and a half up until then. And it was the release valve and also shift towards a new direction. And four months later, we were making one of the biggest changes in our lives.

Laura Cox Kaplan [00:12:55]:

Wow, that's amazing. That's absolutely amazing. Okay, Bonnie, I'd love for you to sort of jump into the life brief and the way that you structured it. You've got three key parts. Get messy, get clear, and get active. Let's kind of break those down a bit so that folks can understand what you're really talking about and how to get started with this work.

Bonnie Wan [00:13:18]:

Great. So, in my business, in my world of corporate and creative companies and innovation, there's a bias for action. So a lot of times, people leap into action and figure it out later. And there is a lot of goodness in acting. I don't believe in overthinking, but as a strategist, I know that if you take the space and not a lot, what it requires is not a lot of time, but deep engagement and presence. To get messy. Meaning to be in tune with yourself, to drop in with curiosity and ask yourself some of the penetrating questions that get deeper inside you and pull some answers out of you and put it on the page. So, questions like, what do I really, really want? Questions like, whose story am I living? Is it mine or someone else's? Where am I hiding? Where am I playing small? What would I shift if I can make a change right now? So, questions like this and part one of the book is full of prompts and questions and exercises to help you stir up the ingredients, which is what getting messy is all about.

Bonnie Wan [00:14:45]:

And once you have those ingredients, and I invite people to write it down, because writing rearranges the furniture of our minds when we get it on the page, like I did in that dark night, you can invite it. You can invite curiosity and engage it with questions and look at it without emotion and then get clear is about getting rid of all the ingredients that you collected that are distractions and drama. You know, things of the moment, things of the mood, and parse out and separate and hold up the things that are sacred, non negotiable, so important it's surging through your veins. And that's the stuff that is the makings of a life brief. So you work with that like clay, and you sharpen it. You get it to its essence, and that's your clarity. And now it sounds like a lot of work. It's not really.

Bonnie Wan [00:15:48]:

Again, what it requires is spaciousness, engagement, and that can be done in little slivers of time. And once you get clear, action, which is the third part, is automatic because action is a byproduct of clarity. As soon as you get crystal clear, suddenly you look at your schedule, you look at your day, you look at any familiar circumstance, situation, or relationship through new eyes, and you see new possibilities for how you want to show up.

Laura Cox Kaplan [00:16:22]:

Yeah, I know you do a lot of workshops with people. And I was struck as I was reading through the book and thinking about those questions and thinking about my own journey. And I've been doing this work for quite a long time. But I was thinking about if I had run across your book 25, 30 years ago, the level of vulnerability that you have to get into, especially in that messy phase, might have left me feeling so overwhelmed that I might have had a hard time continuing. So I'm curious how you help people keep from getting stuck in the messy in order to work through the other big buckets in the life plan.

Bonnie Wan [00:17:04]:

And this is where the word practice comes in. I use that word really intentionally. I call this a practice because it gets easier the more you do it. And this is where action comes in. I invite you to do it in the smallest, tiniest slivers of time. And it's better to do it for five minutes, ten minutes

a day than a binge that then you leave deprived and depleted for many months to come. Right? It's really about how do you practice? First sitting with yourself, finding your quiet, then little pockets of writing that I call a daily brain dump. And it just exercises you to give yourself permission to go to all the places because it's a private practice.

Bonnie Wan [00:17:57]:

And if you can do it for three minutes, maybe five minutes a day, and sometimes scary stuff might come out, but it typically, people will tell me it's catheter cathartic to get it out because once it's outside you, now you've created space for new emotions, new ideas, new insights. So I'm talking about tiny slivers. And I say, make it so tiny that it's inexcusable. And then try to make it irresistible. Like, what's a cozy place corner in your house that you want to do this? What's your favorite beverage? Maybe you only make it for those sessions. Do you want to play music? Do you want to light a candle? Do you want to have your favorite glass of wine? Who knows? Maybe it's a nibble. At the end of the day, try to create an irresistible circumstance that you can start looking forward to, and then it becomes less daunting.

Laura Cox Kaplan [00:18:56]:

I absolutely love that. Let's talk a little bit about the role of story and going back to understand maybe those pieces of our stories and also the pieces that maybe don't serve us as well. You talk about reframing in the book, and I was reminded, as I was reading that, of the work of Carol Dweck and the growth mindset and how you sort of look at something that maybe is not so great and find a way to glean the most positive aspects. Maybe talk a little bit about how you have. How you think about story, how you advise other people to think about their backstory and maybe use that in ways that are more positive.

Bonnie Wan [00:19:35]:

We are all filled with stories, and not all of those stories are ones that we've generated from our own experience. Right. We've been handed stories from the moment we stepped into this lifetime, and often they're there to serve us. They're given to us in very loving ways, but they form the narratives that direct our actions. I remember my first retreat that I led in Costa Rica. On the very first day, a woman said, my parents told me never to ask the question, what do I want? That will always lead to disappointment. So that's a story. And it was a story that was keeping her from going there, right? And it was a story given to her out of love, out of protection.

Bonnie Wan [00:20:26]:

But by the end of the retreat, she was ready to let that story go and invite a new story. So we are filled with stories that we've inherited, adopted, picked up from others. And part of this practice is sorting which stories are ones you want to keep and which ones do you want to shed and let go of. Right? And if you were to rewrite your past, how would you reframe it? And if you were to author your future, what would you write? There's an exercise in the book, and it's one of the favorite exercises of strategists that I know, which is called reframing. It's where you take a thought, a belief, a value, and you rewrite it. So, first you write it in the way that you see it, and you have known it. Never ask the question. Or how about for this woman? Her story would be

asking, for what I want will always lead to disappointment.

Bonnie Wan [00:21:28]:

And then the exercise in the next chapter is to. Now, how would you rewrite that story for yourself? You know, and try rewriting it three or four times. Maybe if I don't ask for what I want, I will never know if it's available to me. Asking for what I want is a sign and demonstration of self love. Daring to ask for what I want is a practice of being centered in my life and creating the life I really want, you know? So it's a practice of trying on new stories and seeing which one might propel us into a new future.

Laura Cox Kaplan [00:22:24]:

Yeah, yeah. On that point, propelling us into a new future, I am thinking about all the, you know, the people who may be listening, the women who may be listening, who are in the midst or considering some kind of a career pivot. Let's talk a little bit about how the life brief can help support you as you contemplate or maybe navigate those pivots in life. And let's face it, those are inevitable. I didn't necessarily see mine coming. It just kind of bonked me on the head. And I said to myself, I'm really not where I'm supposed to be, but let's talk a little bit about how the life brief can help us maybe be a little more self aware and also help us navigate those juncture points.

Bonnie Wan [00:23:08]:

Yeah, pivot is a scary word for a lot of people, especially if it's self directed or proactive. Right? Because it's like, oh, terrifying, so much change. And again, that's why I invite small, small. We are vulnerable when it comes to change, right? But change is, as you said, inevitable. There is nothing but change, and it's coming fast and furious, and it's not going to slow down. We are living in a time of peak complexity, ambiguity, uncertainty. Just open the news and you can see it. And actually don't open the news too much.

Bonnie Wan [00:23:45]:

It's unhealthy for us. That's why getting messy is so important, right? To ask yourself the questions, the penetrating questions, to say, hey, how do I want to show up? How do I want to serve? What do I value? What matters most to me, and is that aligned with what my life looks like right now. And it doesn't have to invite big change, because what I found is the tiniest shifts in how we show up in any of our relationships, including our relationship with work, is an automatic invitation to other people around us to shift how they respond. And that can have ripples that automatically unfold bigger and bigger change. And it doesn't always have to be massive change or monumental change. It can be the tiniest shifts that improves your current situation. Now, when it comes to work, I've been through every stage of this. In the beginning, when I was doing it, I think it really propelled me to partner and head of brand strategy, which was not anything I had ever imagined was possible when I was working a four day week as a mom of four in a different city from our agency.

Bonnie Wan [00:25:14]:

And that was a really exciting time. When I let go of my resistance to a story in my head about the job I wanted, I ended up doing the job that I had always dreamed of. Then in 2020, when the pandemic hit, the George Floyd killing happened and the asian women in Atlanta, I had to take a really deep look at my asian identity and realized all the ways I had assimilated in order to succeed. It started when I was in 8th grade, all the way up to adulthood. It got me to where I was because I was able to mold myself to a culture that wasn't mine to begin with. I went against my nature, and then I could see all the ways participating in that story. That culture had worked against me in terms of serving other women and misrepresented people in the workplace. And so I wrote a new life brief.

Bonnie Wan [00:26:21]:

Then that really pivoted my leadership and what I focused on and how I led within an agency and really working to be a change agent. And then most recently, as my book launched and took off, I saw that my time got reconstructed once again, and it brought me full circle right now to my original life brief, which is, how do I take back my time? What matters most in this chapter of my career? Can I pivot more towards a career of service versus the commercial world, which I've been in for 30 years? So we're navigating that change right now. And it's that clarity that keeps me focused and committed in the wobbliest and weakest of moments, because I can return to it and remind myself, oh, yes, this is the long game. This is the long view that I'm committed to. And this is a moment that's messy. It's part of the transition. It's painful, but it's worth doing because of that clarity.

Laura Cox Kaplan [00:27:36]:

Yeah, you said something a moment ago, and you talk about this in the book as well, that. But the life brief is. I mean, it's really important, and it provides you with that guideline that you can come back to at a moment when you're wobbly, to use your words. But you also talk about the fact that it's not necessarily a one and done, that you may need to revisit this with regularity, maybe provide us with some advice on once you have this product, then what? How often do you revisit it? How often do you change it or adjust it? Maybe give us some perspective on kind of the long game with the life plan?

Bonnie Wan [00:28:15]:

Yeah. So take our time. Was that original name for that original brief that had five declarative statements. And I invite people to write it in a sticky and sharp way so that it tattoos into your mind and your heart. You don't have to open it up every time. Right. You don't have to have it on you, though. You can take a photo of it.

Bonnie Wan [00:28:39]:

And every time that I was at a crossroads. Take our time. Was that tagline almost right that came up in mind? Oh, yes. This is what I'm doing when I'm getting that invitation, and it means that I have to leave my family, and it's not exactly what I want. Okay, that's a no versus a yes. And then eventually, new things happen. Circumstances change. We moved our family from the Bay area to Portland, Oregon, and it opened up and unlocked a golden chapter.

Bonnie Wan [00:29:14]:

We went from the dark chapter of our family life to our golden chapter, and we ended up having our fourth child, Mabel. And through those years, six years, eventually, I found myself in a new place, yearning for new things. What I really, really wanted was the next step in my career, because I had really invested in my partnership and my marriage and being the best mom I could be in those early stages. And as that ground became more and more solid, it propelled me into, okay, I need another life brief. But I have had life briefs forced on me. You know, in the book, I talk about the mad love brief. When the second time our marriage was deeply challenged, my husband. Throughout the question that surprised and blew my mind.

Bonnie Wan [00:30:08]:

Are you still madly in love with me? What? Who asked that? In the middle of an innocuous, everyday fight? And the answer was no. I didn't say it. I didn't let it out. But it came up to my throat and all the way to the edge, and I held it back. But it did force me to contend with. Hmm. Do I want to be madly in love with my husband? I didn't think it was possible. But after many other questions and some deep introspection on a six hour flight, I came to the conclusion that I am better with him than I am without him.

Bonnie Wan [00:30:53]:

I like myself better. I like who he stretches and challenges me to be. If I could have that fiery passion back with him. Yes. Yes, I want that. Though I didn't believe it was possible because of the ways that we had entrenched ourselves after 17 years of marriage. But I wrote it down anyways, and that's what I call courageous living, that you dare to declare what you really want, even if you can't see how it would be possible. And it's happened dozens of times, including with my parenting, with money, which I have a lot of stories limiting stories about that I have to work through.

Bonnie Wan [00:31:41]:

And I have to work through those patterns time and again, obviously, my work, my relationships. So it's been a really full ride experience with this.

Laura Cox Kaplan [00:31:53]:

And I think it's important to note you are still married to your husband, to the same guy who originally wrote back. Yes. To your original concept of the life brief.

Bonnie Wan [00:32:03]:

Yes. And I've been with my work, my agency for 25 years. I've been with my husband for 23 years. So it has definitely helped me navigate some really long term relationships. A lot of people, a lot of leaders who bring the life brief into their companies. We have fireside chats, or they've helped me teach teams. One of their initial hesitations is, will people leave?

Laura Cox Kaplan [00:32:32]:

Everyone's gonna leave.

Bonnie Wan [00:32:33]:

You know, is this all about quitting your job, divorcing your spouse, you know, putting your pets up for adoption? And actually, I think I'm living proof that it is the way to deepen those relationships. And now, since launching the book, I've watched relationships deepen between strangers who choose to do it together, because somehow this practice feels like something that gives people a sense of belonging, allows them to reveal deeper parts of themselves and foster more meaningful bonds with people.

Laura Cox Kaplan [00:33:10]:

Yeah, that's so beautiful. And it's such a piece that I think is often missing this idea of connection and the ability to collaborate more effectively with each other at a time when we are really divided about what we believe about the state of the world. I think that's such a beautiful thing that you're bringing people together in that way. Bonnie, how can people potentially work with you, or have you come and talk to them about the life brief?

Bonnie Wan [00:33:41]:

Yeah, well, I'm doing a lot of talks, and that's been really fun for me, to engage with people and meet different people and hear their stories. So I've been doing a lot of talks at companies and then within communities. I'm also doing workshops with teams and with leaders, leadership briefs, and then also helping people get clear about their next stage in their work. So it's been coming up in lots of different iterations, and this is the joy work, this is the service work, and I've just created more space in my work time to allow for it, and it is deeply joyful.

Laura Cox Kaplan [00:34:23]:

Yeah, I love that.

Bonnie Wan [00:34:24]:

So people can reach out to me on social media, on LinkedIn and Bonnie Juanofficial on Instagram or come to my Website@Thelifebrief.Com .

Laura Cox Kaplan [00:34:34]:

Fantastic, Bonnie, thank you so much. This has been such a pleasure.

Bonnie Wan [00:34:41]:

Laura, thank you for having me.

EPISODE 295 CLOSE:

Laura Cox Kaplan [00:34:44]:

Hey friend, thanks so much for joining me for episode 295 of she said she said podcast my conversation with the life brief author Bonnie Wan. I've included a link in the show notes where you can order her terrific book. But I also would love to know what you thought about today's

conversation, so be sure to let me know. You can find me on Instagram or Cox Kaplan, or even better, you can leave me a review. I would really, really love your feedback and your thoughts. You can leave a review wherever you're listening to this podcast from and I would be super grateful. You can also send me an email at infocheshe said media. Your input really helps as we think about content going forward and the types of topics that are most valuable to you.

Laura Cox Kaplan [00:35:33]:

As summer gets underway, I will be taking some time off. I will probably pause the podcast for a couple of weeks as we retool and think about how to give you the most value for the time that you spend with me. I am really, really grateful for that time and I want to make sure that we are all using it together really efficiently and effectively and that you're getting something of value. So it's helpful for me to to hear from you and so make sure you send your thoughts my way. In the meantime, have a great rest of your week and a great start to your summer, and I'll talk to you again real soon. And remember, she said she said podcast is a weekly production of she said she said media.