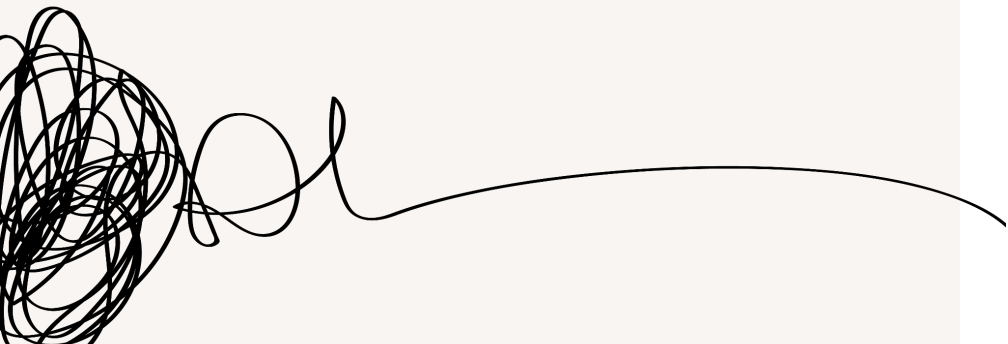# How to Run an Effective Research Team

Introductions

Write in the chat:

1. **Preferred first name and pronouns**

2. **Role** (faculty, staff, postdoc, PhD student, or graduate student) **& school/department**

3. **What you're hoping to get out of workshop**

👋 Hi, I'm Emily (she/her)

I develop and lead programs focused building leadership skills using **design thinking methodology**.

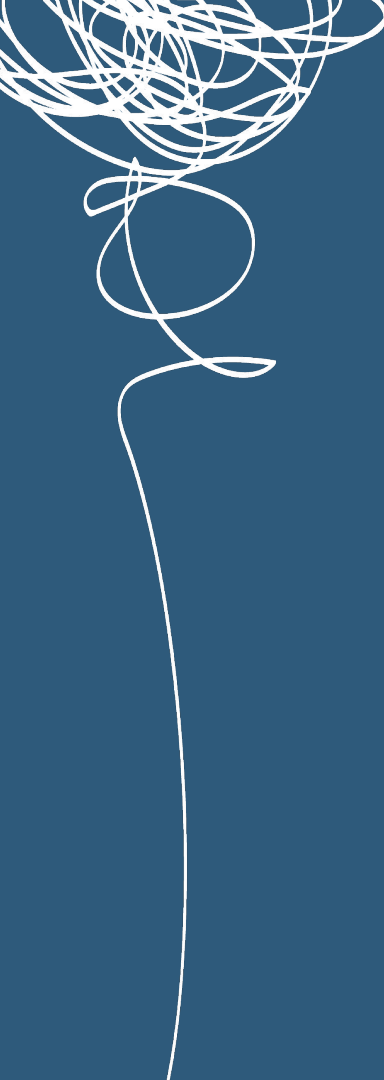I also coach leaders 1:1 to help them **realize their potential** with confidence and clarity.

Let's Prepare for the Day

Designing our Space

Please stay present with cameras on

5min break around 1p PST; please return promptly

Ask questions & engage in discussion

Reference the digital workbook

Overview of the Day
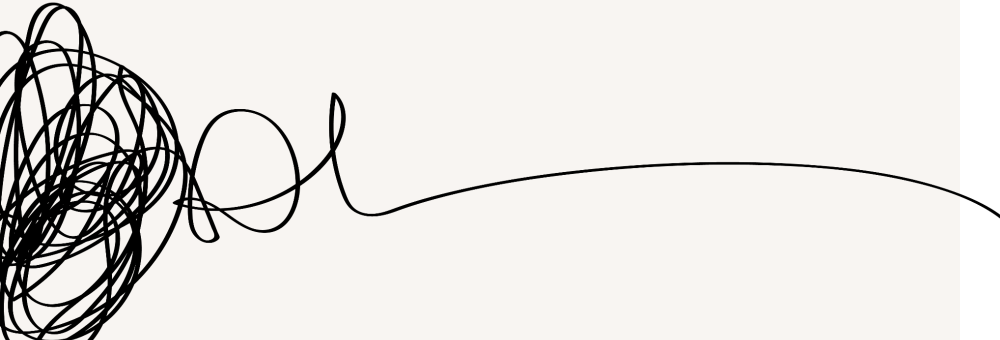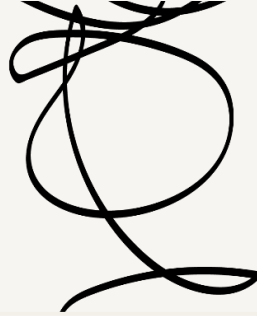
Increasing Team Effectiveness

Key Tool: User Manual

Creating a User Manual

How to Apply with Your Team

Final Q&A / Wrap-Up

For you, what is getting in the way of having an effective research team?

Increasing Team Effectiveness

Stages of Team Development

TEAM EFFECTIVENESS

Performing
strong collaboration; shared vision

Norming
respect for differences; clear roles & rules

Forming
getting acquainted; uncertainty

Storming
struggle; disagreement

TIME

TEAM EFFECTIVENESS

TIME

Forming
getting acquainted; uncertainty

Storming
struggle; disagreement

Norming
respect for differences; clear roles & rules

Performing
strong collaboration; shared vision

**Learn how to work together
through trial & error**

There's an opportunity to accelerate time to team effectiveness
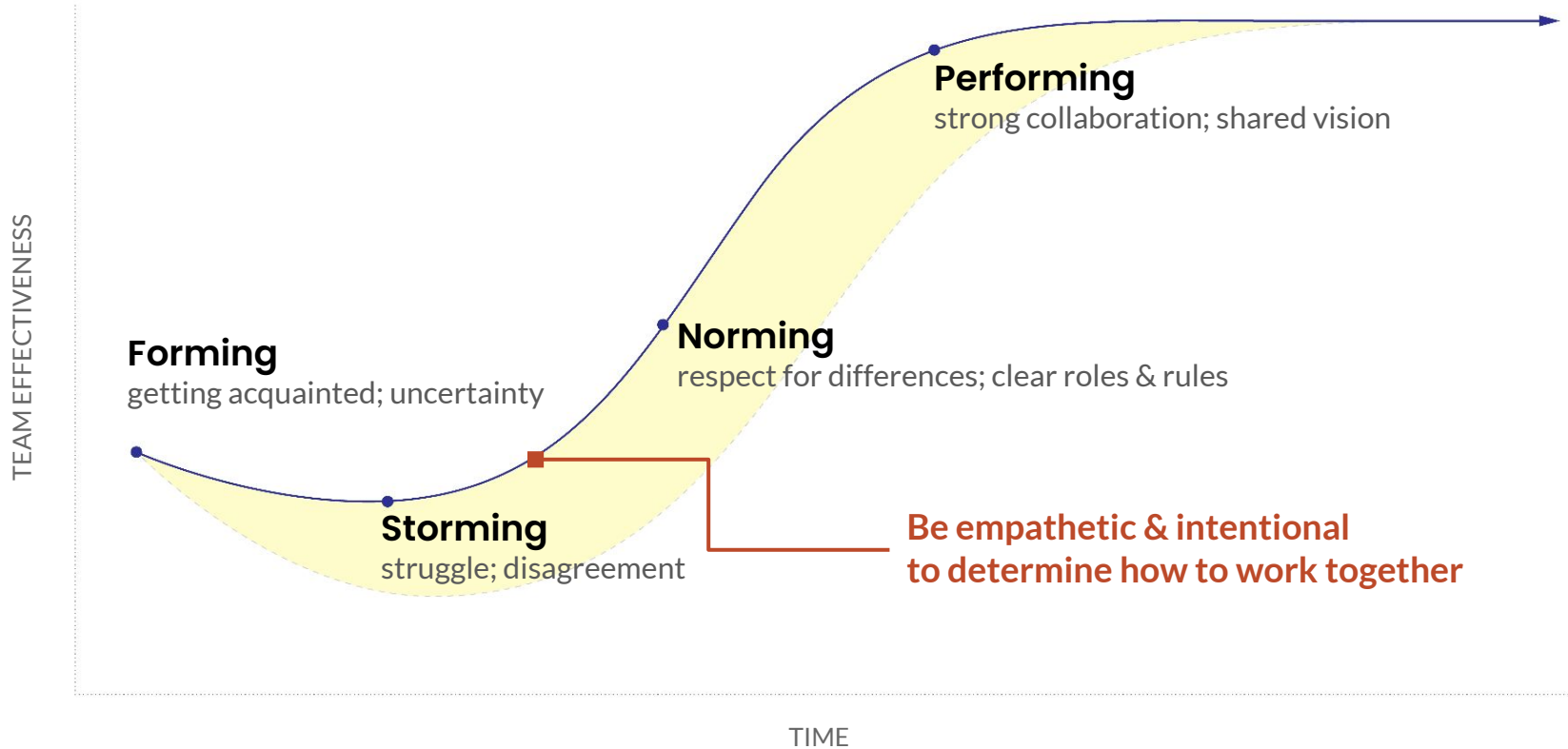
TEAM EFFECTIVENESS

Forming
getting acquainted; uncertainty

Storming
struggle; disagreement

Norming
respect for differences; clear roles & rules

Performing
strong collaboration; shared vision

**Be empathetic & intentional
to determine how to work together**

TIME

Increase Team Effectiveness

BE EMPATHETIC

Understand others' experiences and needs

BE INTENTIONAL

Develop a deep self-awareness & communicate what you know about yourself

Increase Team Effectiveness

BE EMPATHETIC

Understand others' experiences and needs

Proactively share & seek out this information

BE INTENTIONAL

Develop a deep self-awareness & communicate what you know about yourself

Increase Team Effectiveness

BE EMPATHETIC

Understand others' experiences and needs

BE INTENTIONAL

Develop a deep self-awareness & communicate what you know about yourself

Document what's known

DOCUMENT WHAT'S KNOWN

Creating a User Manual

a living artifact for sharing your default working style, preferences, and what it's like working with you

User Manual examples

manager-readme

What is this?

I'm Jess Dale and this is my Manager README, a document that helps introduce you to my management style, philosophy, and expectations. The intended audience is primarily anyone who reports in to me, though anyone is free to read it - as well as provide feedback on it! Please treat it as a reference and promise on how I will conduct myself as a manager, and what I expect from you.

I urge you to hold me accountable to my promises, and to call out anything that might be missing from this document. Without your guidance, I will not be able to improve as a manager.

> Disclaimer: This document does not apply to anyone else in the company, and solely reflects on my personal management style.

My Job

As a Design Manager, it is my job to:

1. Start with why - providing context and vision
2. Manage and develop well-functioning design teams
3. Create safe spaces and provide support for designers to develop and growth
4. Refine or define processes that ensure the success of our team's work
5. Hire, train and retain world-class talent

I'm here to help and support you, to set context for what you're working on, and to advocate for you and the team with the rest of the company.

If I fail at any of these - especially anything that puts retaining you at risk - you would be doing me a **huge** favor by letting me know as soon as possible. I don't expect everyone to stick around forever, however if a departure is potentially due to something we could have done different, I would appreciate the chance to make things right first.

How I approach my job

I am not an authoritarian boss. I do not want to micro manage anyone - it's not a good use of my time, or yours.

My teams come first, the clients second, and the company comes third. Obviously I have a responsibility to the company, but without a well operating, well staffed, and well functioning team, I am unable to live up to those responsibilities. Your success is ultimately my success - so I will go out of my way to try and make you successful.

How I expect you to approach your job

Terri Eichholz

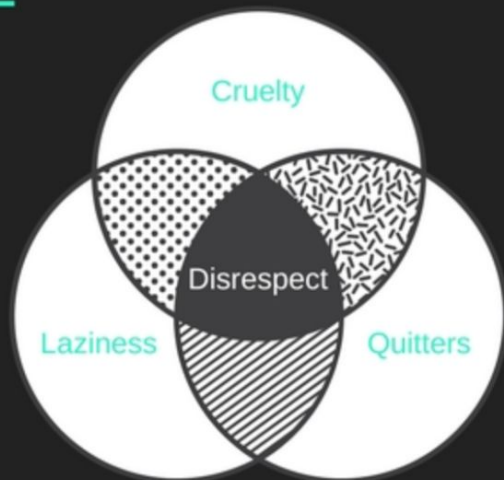GT Teacher

Email   terrieichholz@gmail.com
Website   engagetheirminds.com
Twitter   @terrieichholz

My Style

I enjoy giving students a goal and letting

What I Don't Have Patience For

Cruelty

Laziness

Disrespect

Quitters

How to Help Me

Respect yourself and others.
Work hard.
Challenge yourself.
Tell me if you have a question or concern.
Try to view things from different perspectives.

Heylo 👋

Lakshmi here 😊
Pronouns: she/her

Here are some things I've learned about myself over time. Oh - one major thing I've learned is that I've been changing & evolving a lot with time and so shall these cards! 🍼🧗‍♀️😅

Last updated: 12 Dec 2022

My general work style isn't very rigid - always open to ideas 🙂 Uncertainty and ambiguity ain't my best friends (yet 👀) so I like to make sure there is some plan to what we're working on together, whether we decide to stick to it or not. I like to ensure that we're on the same page about our goal. 🎯

I may not always succeed but I always strive to balance work and life. Life mostly for me means time spent with family and close friends. 🤗

What I value

If our values mostly match or overlap, I think we'll have a great time working together.

Empathy 💙
Compassion 💛
Humility 💜
Honesty 🤍

Just being kind, genuine and open to different perspectives ¯_(ツ)_/¯

What I don't prefer

It's difficult to make me angry. 😡 Unfairness especially gender, racial and other forms of inequality can get me there.

I could get disappointed 😟 at acts of selfishness like taking your team's credit or not being considerate of your team's time and effort.

Communicating

If we're not together then,
• Call me! 📞 If it's urgent or if you just want to talk/rant

• Slack me! 💬 If it can wait

• Email me! ✉️ If it's formal & detailed and needs to be documented

But hey - open to discuss what works for the team :)

Giving feedback

Rule #1 Don't wait to share it! ⏳

I super appreciate honest and pointed critical feedback, especially when it's backed up with examples. ✅
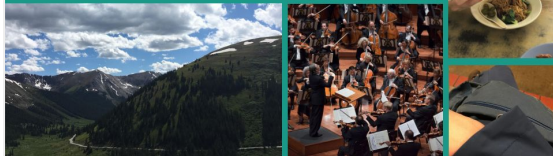
Also hey, tell me what went well so that I sustain those parts! Also helps my anxious self-deprecatory self 🥹

User Guide

Emily Parcell

My Interests

My Values

Balance

Personal Responsibility & Self-Management

Growth & Development

Balance

I strive for a sense of evenness in my emotions, level of stress, and level of attention to or care of core aspects of my life: health, growth, curiosity, relationships, etc.
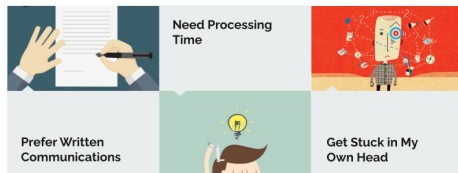
Personal Responsibility & Self-Management

I place a high value on my promises to others and I respect those who take responsibilities seriously, are reliable at following through. .

Growth & Development

I admire people with keen self-awareness, who are constantly looking to learn, and who admit their challenges and growth areas. I am suspicious of those who say there is nothing they could have done any better.

How I Communicate

Need Processing Time

Prefer Written Communications

Get Stuck in My Own Head

My Quirks

Worry is my love language

Rather(?) impatient

Singular focus/tunnel vision

what are other words for quirky?

peculiar, odd, unusual, bizarre, strange, kinky, eccentric, weird, offbeat, unconventional

My Areas of Growth

Providing feedback in a direct, structured manner

Clarifying & holding boundaries

Distilling information into a consumable stream

Building a User Manual

How to create your document

Sources of information might include:

- Assessment results (DiSC, Enneagram, Myers-Briggs, StrengthsFinder, etc.)

- Feedback & acknowledgements received

- Interview those close to you

- Personal written reflection

- Sharing & discussion with others

My Values

My Working Style

My Growth

Values are fundamental beliefs that provide a sense of purpose and meaning.

They guide our decisions and behaviors, whether expressed or suppressed.

My Values

What I value

Why a user manual

The bigger picture of me

My Working Style

My Growth

Openness

exploration / variety / curiosity

What that might mean for you...

I feel very comfortable in the space of exploration and discovery, and enjoy collaborating with others to generate divergent thoughts.

I tend to use meeting time to engage in open exploration together, and sometimes that confuses colleagues who show up expecting answers or decisions.

Drafting your user manual | individually

5:00

A number of prompt questions for **Values** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

My Values

> **TIP: Places to look for values**
> - Things that make you mad
> - Others you admire
> - Peak experiences (times when you felt most energetic & alive)

Prompts	My Notes
What I value • I feel the most fulfilled when… • I'd like to be described as… • I get frustrated when… • I can hold my head high as long as… • I admire my colleagues when they… **Why a user manual** • Why I am writing this user manual • What I hope will be the result of writing and sharing this **The bigger picture of me** • What I like/my hobbies • My hidden talents and unique abilities • Other things to know about me outside of work • Things I need to be my best and most resilient self	

Drafting your user manual | individually

5:00

A number of prompt questions for **Values** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

Drafting your user manual | individually

5:00

A number of prompt questions for **Values** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

What's in a User Manual

My Values

What I value

Why a user manual

The bigger picture of me

My Working Style

How I operate

How best to communicate with me

How I respond in challenging situations

Things I do that may be annoying or misunderstood

Things that push my buttons

My Growth

Your working style is comprised of the behaviors and preferences you exhibit while going about your daily tasks.

It's informed by your values, your past experiences, your personality and strengths.

How I Communicate

Prefer Written Communications

Need Processing Time

Get Stuck in My Own Head

Drafting your user manual | individually

A number of prompt questions for **Working Style** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

5:00

Drafting your user manual | individually

A number of prompt questions for **Working Style** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

What's in a User Manual

My Values

What I value

Why a user manual

The bigger picture of me

My Working Style

How I operate

How best to communicate with me

How I respond in challenging situations

Things I do that may be annoying or misunderstood

Things that push my buttons

My Growth

How to support my growth

How I feel about and respond to feedback

My growth is an area to acknowledge what about your working style isn't always working.

This supports a culture of open communication and peer feedback.

My Areas of Growth

Providing feedback in a direct, structured manner

Clarifying & holding boundaries

Distilling information into a consumable stream

Drafting your user manual | individually

A number of prompt questions for **My Growth** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.

3:00

Drafting your user manual | individually
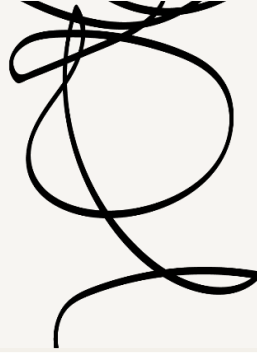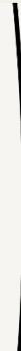
3:00

A number of prompt questions for **My Growth** are listed.

No need to answer all questions — just find 1 or 2 that speak to you to prompt your brief written reflection.
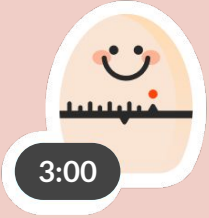
Break

Think about: **what other topics would support increased team effectiveness?**

What other topics would support increased team effectiveness?

Refining Your User Manual

How to create your document

Sources of information might include:

- Assessment results (DiSC, Enneagram, Myers-Briggs, StrengthsFinder, etc.)

- Feedback & acknowledgements received

- Interview those close to you

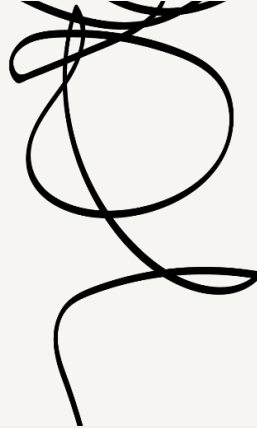- Personal written reflection

- Sharing & discussion with others

Refining your user manual | small groups

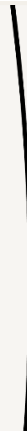Taking turns, share what you've been learning about yourself.

Help others clarify their document by asking questions:

- "What's important about this for you?"
- "What is an example?"
- "How do you want it to be?"

10:00

How was that?

How to apply
in your team

Increase Team Effectiveness

EMPATHETIC

Understand others' experiences and needs

Proactively share & seek out this information

INTENTIONAL

Develop a deep self-awareness & communicate what you know about yourself

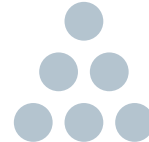# Levels of use for your user manual

Personal
set or find conditions for peak effectiveness

1:1
engage and collaborate with individuals in ways that work for both of you

Team
build trust and navigate differences in working styles, accelerating time to the Norming and Performing

Create as a team activity to build connection

Structured way for team members to get to know each other; leverage discussion to spur self-discovery

Writing your User Manual as a Team

When to Do This Activity

Having a personal user manual can be beneficial when:
- **Starting a new relationship** to provide a structure for introducing yourself
- **Renegotiating the dynamics or navigating the challenges of a relationship** to think through how to communicate about yourself
- **Transitioning managers or teams** to provide a thread of consistency

Materials

This publicly-available document can be shared with team members to introduce them to the activity. Question prompts are also included.

Schedule

The recommended schedule spans 5+ weeks, with a kickoff meeting in Week 1 with the entire team, 3 weeks of group meetings to work through the assignments, and 1+ weeks for share outs with the entire team. Spreading this over time (vs tackling on a compressed schedule) is recommended to allow the topics to marinate and for deeper insights to be realized; a lot of these answers won't be immediately available to folks and will only be realized with time.

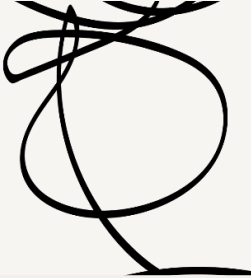| Week	Activities	Purpose
1	Intro to User Manuals: review Introduction & Approach with team; consider sharing examples (it's especially valuable to share your own manual, if you have one)	Introduce the value of the activity and the logistics
2	Meet with assigned group for 30min to share **My Values**	Learn from each others' insights and begin to recognize areas of similarity or difference
3	Meet with assigned group for 30min to share **My Working Style**	
4	Meet with assigned group for 30min to share **My Growth**	

Share at the beginning of new working relationships

Especially effective as a way of modeling open & honest communication

Guide a conversation about challenges in a working relationship

Doesn't have to be a formal sharing of the document; it's the information contained within that's important

How else might you use a user manual (formally or informally) to increase team effectiveness?

Please complete
the feedback form

tinyURL.com/3krux8ck

Thank You!

in /in/eparcell

🌐 hcleader.co