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

Ask questions & engage in discussion

5min break around 1p PST; please return promptly

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

- **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

Forming
getting acquainted; uncertainty

Storming
struggle; disagreement

Norming
respect for differences; clear roles & rules

Performing
strong collaboration; shared vision
There’s an opportunity to accelerate time to team effectiveness
TEAM EFFECTIVENESS

TIME

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
Increase Team Effectiveness

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

**BE EMPATHETIC**
Understand others’ experiences and needs
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
- Disrespect
- Laziness
- 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

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 "(...)_".

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! 🎈

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-deprecating self 😊.
**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
- Worry is my love language
- Rather impatient
- Singular focus/tunnel vision

---

**My Quirks**

- messy, odd, normal, bizarre, strange, funny, 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
<table>
<thead>
<tr>
<th>What’s in a User Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Values</td>
</tr>
<tr>
<td>My Working Style</td>
</tr>
<tr>
<td>My Growth</td>
</tr>
</tbody>
</table>
Values are fundamental beliefs that provide a sense of purpose and meaning. They guide our decisions and behaviors, whether expressed or suppressed.
# What’s in a User Manual

<table>
<thead>
<tr>
<th>My Values</th>
<th>My Working Style</th>
<th>My Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>What I value</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Why a user manual</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>The bigger picture of me</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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)

<table>
<thead>
<tr>
<th>Prompts</th>
<th>My Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What I value</td>
<td></td>
</tr>
<tr>
<td>I feel the most fulfilled when...</td>
<td></td>
</tr>
<tr>
<td>I'd like to be described as...</td>
<td></td>
</tr>
<tr>
<td>I get frustrated when...</td>
<td></td>
</tr>
<tr>
<td>I can hold my head high as long as...</td>
<td></td>
</tr>
<tr>
<td>I admire my colleagues when they...</td>
<td></td>
</tr>
<tr>
<td>Why a user manual</td>
<td></td>
</tr>
<tr>
<td>Why I am writing this user manual</td>
<td></td>
</tr>
<tr>
<td>What I hope will be the result of writing and sharing this</td>
<td></td>
</tr>
<tr>
<td>The bigger picture of me</td>
<td></td>
</tr>
<tr>
<td>What I like/my hobbies</td>
<td></td>
</tr>
<tr>
<td>My hidden talents and unique abilities</td>
<td></td>
</tr>
<tr>
<td>Other things to know about me outside of work</td>
<td></td>
</tr>
<tr>
<td>Things I need to be my best and most resilient self</td>
<td></td>
</tr>
</tbody>
</table>
Drafting your user manual | individually

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

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.
<table>
<thead>
<tr>
<th>My Values</th>
<th>My Working Style</th>
<th>My Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>What I value</td>
<td>How I operate</td>
<td></td>
</tr>
<tr>
<td>Why a user manual</td>
<td>How best to communicate with me</td>
<td></td>
</tr>
<tr>
<td>The bigger picture of me</td>
<td>How I respond in challenging situations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Things I do that may be annoying or misunderstood</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Things that push my buttons</td>
<td></td>
</tr>
</tbody>
</table>
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.
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.
<table>
<thead>
<tr>
<th>What’s in a User Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>My Values</strong></td>
</tr>
<tr>
<td>What I value</td>
</tr>
<tr>
<td>Why a user manual</td>
</tr>
<tr>
<td>The bigger picture of me</td>
</tr>
<tr>
<td><strong>My Working Style</strong></td>
</tr>
<tr>
<td>How I operate</td>
</tr>
<tr>
<td>How best to communicate with me</td>
</tr>
<tr>
<td>How I respond in challenging situations</td>
</tr>
<tr>
<td>Things I do that may be annoying or misunderstood</td>
</tr>
<tr>
<td>Things that push my buttons</td>
</tr>
<tr>
<td><strong>My Growth</strong></td>
</tr>
<tr>
<td>How to support my growth</td>
</tr>
<tr>
<td>How I feel about and respond to feedback</td>
</tr>
</tbody>
</table>
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.
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?”
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
WAYS TO USE

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
RESOURCE: TEAM ACTIVITY

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.

<table>
<thead>
<tr>
<th>Week</th>
<th>Activities</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Intro to User Manuals: review Introduction &amp; Approach with team; consider sharing examples (it’s especially valuable to share your own manual, if you have one)</td>
<td>Introduce the value of the activity and the logistics</td>
</tr>
<tr>
<td>2</td>
<td>Meet with assigned group for 30min to share My Values</td>
<td>Learn from each others’ insights and begin to recognize areas of similarity or difference</td>
</tr>
<tr>
<td>3</td>
<td>Meet with assigned group for 30min to share My Working Style</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Meet with assigned group for 30min to share My Growth Goals</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Meet with assigned group for 30min to share My Growth Hurdles</td>
<td></td>
</tr>
</tbody>
</table>
WAYS TO USE

Share at the beginning of new working relationships

Especially effective as a way of modeling open & honest communication
WAYS TO USE

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!

/linkedin /in/eparcell
/globe hcleader.co