User Manuals

What is it?

A User Manual can help team members understand how each likes to collaborate and communicate. It also can help you as managers connect more authentically and in a more inclusive way with your team members. Complete this exercise with your team using the worksheets below.

<u>Recommended process (and options)</u>

1) Have each team member complete the following worksheet individually. You may discuss the user manuals 1:1 with team members in check-ins, or all together in a team meeting.

   Sample email text:

    "To help us develop mutual expectations and norms, I'd like our team to engage in a "user manual" activity. Can you please complete the worksheet (at least page 1) by _____? You can share whatever information you are comfortable sharing."

   a) For 1:1   "I'll read what you've shared and plan to discuss together at our next check-in, to make sure I understand your needs"

   b) For team meeting "I'll read what you've shared and will invite all team members to share whatever they're comfortable with at our next team meeting, so that we can better understand and work with each other."

2) If you believe that your team would be comfortable discussing their user manuals together, then schedule a group "User Manual" meeting. Begin by sharing your own "User Manual" so your team can know your working preferences, before asking for those comfortable to share, round-robin style. Next, lead the group in discussing questions such as "How are we similar? How are we different? How can we leverage these similarities and differences to be even more effective?"

Prompts	Your Response	Example
Conditions I like to work in: **What are some conditions that help you do your best work?** **What conditions are you currently working in?**		• I like a quiet working environment. I find it hard to do work that requires my concentration if there are a lot of distractions. • If I have my headphones on in the office, I am in focus mode, so it is best to send me a message via MS Teams rather than tap me on the shoulder. • I am working from home, and around my children's schedules. I go into our home office in order to concentrate.
The time/hours I like to work: **What schedule helps you be most productive?** **What schedule do you currently have to work with?**		• I tend to start my day very early, since I am a morning person. Ideally, I'm a 7:30am-4pm worker. • Currently, I am adjusting my hours in order to care for my children during the day. I tend to start the day around 7 a.m., and then work until 3. There may be some interruptions during this time due to childcare. Then I catch up on projects in the evening.
The best ways to communicate with me: **What forms of communication are the most effective for you?**		• Chat via MS Teams is the best way to ask quick questions. • I tend not to check my phone or texts as often. I also may not have time to answer calls during this time.

Prompts	Your Response	Example

The way I like to receive feedback: **What's important to you about feedback – either content or mode of delivery?**		• *I welcome feedback when it's not directed at me as a person, but is about my work or actions.* • *I'd rather have feedback via a phone call or online meeting than by email.* • *I see all feedback as a learning opportunity so I like any feedback to include specific examples and also suggestions on how I / it could be better/different*
Things I need to do my best: **What do you need from your organization or the people you work with in order to do your best work and for your well-being?**		• *I love idea sessions with people, where we can freely think about what is possible without the if's and but's* • *Authenticity - I find it really hard to be around dishonesty, passive aggressiveness, inconsistency or incongruence* • *I have many hobbies and interests, so keeping a healthy boundary between my work and home life is important to me.*
How I work & learn: **What helps you work and learn most effectively when you are on a team?**		• *Before starting off with a project, I like to have as much context as possible. I am a details person and will work my way to the big picture.* • *I learn by doing – it is easier for someone to show me a task, and for me to follow along, than to read directions.*

Prompts	Your Response	Example
Things I care about or find energizing: **What are some things that help you bring your best self to work, or provide you with more energy?**		• *I really care about the environment, and would love to figure out ways our program can be more "green" in our operations.* • *I am energized by work that taps into my analytical skills. I enjoy working by myself to find answers, and then presenting my findings to the team.*
Things that help you feel valued or included: **What are some things that would help you feel more valued and included on this team?**		• *I like organizing team building activities – such as outings or retreats. Ask me for my help!* • *I need some time to process my thoughts in team meetings. I tend to feel more comfortable sharing my ideas in one-on-ones – so please ask me for my input after meetings.* • *As someone who grew up outside of the US, it would be nice to share my expertise on multi-cultural communications, particularly for our students who wish to travel abroad.*
Other things to know about me: **What additional things do you think others should know in order to better understand you?**		• *I am not very expressive, so sometimes people assume that I am not in a good mood. If I am quiet – it doesn't mean I'm not fine!* • *I tend to think about worst-case scenarios. When I voice doubt in team meetings, it is not to be negative, but because I want to cover all the bases.*