Planning/ organization goals and strategies

Co-Worker Interactions (Team mates)

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1 Goal: Take time to evaluate a task before starting it

1.1 Problem: The team rushes to start working on the task without thinking about it

1.11 Strategy: Take time to evaluate tasks, time constraints, and resources.
"Okay, we have 4 days to do 3 things. We should think about whether it make sense to give each of these equal time or if we think some are more complex than others. Also, what do we have coming up in the next few days, because some of us might have more time right now than others."

1.2 Problem: The team does tasks in order rather than prioritizing and assigning.

1.21 Strategy: Just because a team has three tasks listed, doesn't mean you need to do them in the order specified. Some tasks should be done first and others can be done simultaniousely. In order to decide order, priority, and whether tasks can be assigned to subgroups, the team must spend a few moments discussing how much, time, effort, and value each task has and think creatively about the best way to get it done.

Sarah: " We have interview our clients, collect information about the company and then upload any artifacts to our case study. "

Emanuel: "Well, we should not talk to clients before understanding their company or system so maybe we should do that first--- we can all research different areas. What do you think? "

Joe: "I think that makes sense. Afterwards we could all come up with 5 important questions and then we can select the best ones from that list. I think we should upload artifacts as we go; every time we find information on the company, take a screen shot and add it..."

2. Goal: Develop a joint game plan: strategically approach tasks as a team.

2.1 Problem: Meetings are disorganized and mismanaged

2.11 Strategy: Prior to meeting send out an email asking members to suggest topics of discussion or tasks that need to be addressed during the meeting. Use this information to create an agenda for the meeting and email agenda to members.
Example email:

RE: Agenda for Tues

Hi Everyone,
It's my turn to organize the meeting. Based on your responses, here is the agenda for Tues:

Problems we experienced during last meeting: (15 minutes total)
(Josh--- he was organizing and evaluating the last meeting) report on issues that need addressing.

    Suggestions for preventing/correcting these problems (discussion---5-10 minutes)

Updates on sub groups: (25 minutes total)
Tom and Gill--- resource evaluation (10 minutes)
Derrik and Ticita---Student needs (5 minutes)
Josh and Me--- Systems analysis (10 minutes)

We also want to set aside 20 minutes to discuss our next steps and plan a course of action.

This means our meeting should take about 1 hour so plan accordingly and bring what ever you will need to contribute.

Thanks,
Sara

2.2 Problems: There is no set plan for what to do.

2.21 Strategy: Develop a written DETAILED plan together after you have taken time to evaluate the task, constraints and resources. This way you can prevent miscommunications later on.

> "Okay, well now that we have a good idea of what we need to do and how each of us can contribute lets write up a plan with some initial due dates, and goals we want to make sure to focus on..."

2.22 Strategy: Help the team decide what each subgroup will do and what the product will entail.

> Mike: "We need to decide who is going lead each aspect of the project."
>
> Isabel: "I can do the problem scenario."
>
> Mike: "Okay, do you understand the problem scenario, because I'm not sure I know what needs to be in it."
>
> Isabel: "Yeah, I think it just is supposed to synthesize everything we learn from the requirements into one story, that way we can make sure we capture all the important considerations for designing a system that works for our stakeholders and supports how things are already done by potential users ."

2.23 Strategy: Help the team develop a realistic time line for the plan.
> "I think it will take us about an hour to do... , how long do you two think it will take to do... ?"

2.3 Problem: The team is not sticking to the plan

2.31 Strategy: Set time aside to discuss current updates and next steps.
> "Okay, last time we did not get as far as we had planned, so I think we need to see where everyone is at and where we should go from here."

2.32 Strategy: Evaluate the feasibility of the original plan.
> "We are way behind where we thought we would be by now, but I think we didn't realize how difficult this part of the project would be. I think we should rethink our deadlines and maybe simplify a few things so we don't get more behind."

2.4 Problem: People are not paying attention to each other or listening during planning.

2.41 Strategy: Make sure you can see everyone's eyes are on the speaker.
> "Folks let's pay attention to Dante so we can all be on the same page."

2.42 Strategy: Ask someone who may not be paying attention to assist you during planning.
> "Mike, could you to make sure that we write down good notes of our plans so that we can remember our goals and deadlines."

3 Goal: <u>Keep records of meetings, ideas, and professional emails</u>

3.1 Problem: The team comes up with good ideas, but fails to implement them

3.11 Strategy: Keep detailed notes during meetings or brainstorming sessions. Do not leave a meeting without determining next steps, determining who will do which tasks, and setting deadlines.
> "Well we need to interview our clients by next Friday so we need to do research this week. We can find information from their blogs, Google, and news articles... Ray, can you be in charge of researching the customer's blogs?"... Can you tell us what you find at the next meeting?"

3.2 Problem: There is no continuity from one meeting to the next.

3.21 Strategy: Before each meeting (preferably when creating agendas), take time to review the notes from the last meeting in order to know what things need to be addressed that day and who is scheduled to update the team.
> "Ray, tell us what information you gathered last week."

"Well, last meeting we didn't get a chance to discuss who will moderate the client meeting, so lets start of by discussing that today."

4 Goal: Assign tasks equitably and make deliverables accessible to all

4.1 Problem: People are assigned tasks that they can't do or dislike.

4.11 Strategy: Help the team determine the capabilities and interests of each person
"Which part of the work would each of you like to do?"
"Chris are you good at …?"

4.12 Strategy: Help the team assign tasks based on expertise and interests
"Chris since you are good at …, why don't you work with Pat on that?

4.13 Strategy: Ensure team members that next time they'll get first pick
"Debra got a task she didn't want this time, so next time she gets first pick.

4.2 Problem: People are working independently without getting any feedback.

4.21 Strategy: Help ensure that the team works together whenever possible.
"Since this is the most important task, we should work on it together and make sure we meet all the grading criteria.

"We don't seem to be benefitting from each other's input. Why don't we finish up what we are doing in the next few minutes and then take some time to discuss what we have done and get some feedback.

4.22 Strategy: When forming subgroups always make sure at least two people are working together so they can provide each other with feedback.
"We've got a lot to do this week. How about I work on this part with Mark and you three can tackle the second half? We can make sure to share what we have done half way through."

4.3 Problem: People feel they are getting an unfair deal.

4.31 Strategy: Share unpleasant tasks.
"Since no one wants to do this and that, why don't two of us do this and the other to do that?"

5 Goal: Set project and interaction goals

5.1 Problem: The team is not improving collaborative processes or their deliverables
5.11 Strategy: Take time to discuss and set goals for team processes, not just product deliverables.

From: Borge, M., & White, B. Y. (2009). *Scaffolding collaborative processes with managerial roles.* Paper presented at the American Educational Research Association, San Diego, CA.

"We really need to improve our ability to meet deadlines. Are we setting unrealistic deadlines or are we just not putting forth enough effort? We really need to figure this out."

"Okay, what are some process goals we want to focus on today."

" For the client meeting, I will make sure we really understand what the client wants and keep notes on the discussion. Kasey will keep us on track and keep an eye on the clock..."

5.12 Strategy: Set goals throughout the project so as to constantly challenge the team to improve.
"Last time we received negative feedback about... so this time lets..."

5.13 Strategy: Decide together what you want to achieve.
"Do we all agree that our main goals are …?"

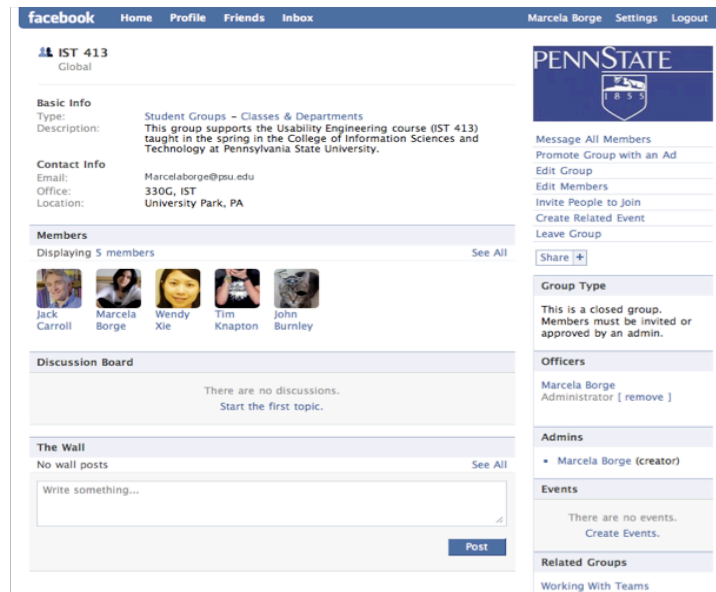## 6 Goal: Set up ways to make information/deliverables easily accessible and modifiable

6.1 Problem: Team members cannot see work products until they are turned in.
6.11 Strategy: Use on-line collaboration tools like Google Docs that allows everything to be stored in one place and modified in real time.
"Okay, who has a Google account and can put our documents on-line.

6.2 Problem: It is hard to coordinate the team with all of the tasks and information related to the task.

6.21 Strategy: Create a Facebook group that can serve as a place to post questions, comments, concerns, events, and links to documents.

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6.3 Problem: There is a lot of information to be shared and analyzed, but no organized way to do so.

6.31 Strategy: Create charts, graphs, calendars, maps, or other visual representations to serve as a place to integrate all information.

> "Okay, we have a lot of information that different people have compiled, so lets put it in a form we can all take in and integrate better. Any suggestions?"
> "Jack can you create a chart: for the columns write... for the rows..."
> "let's make a cost/benefits analysis T chart.

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