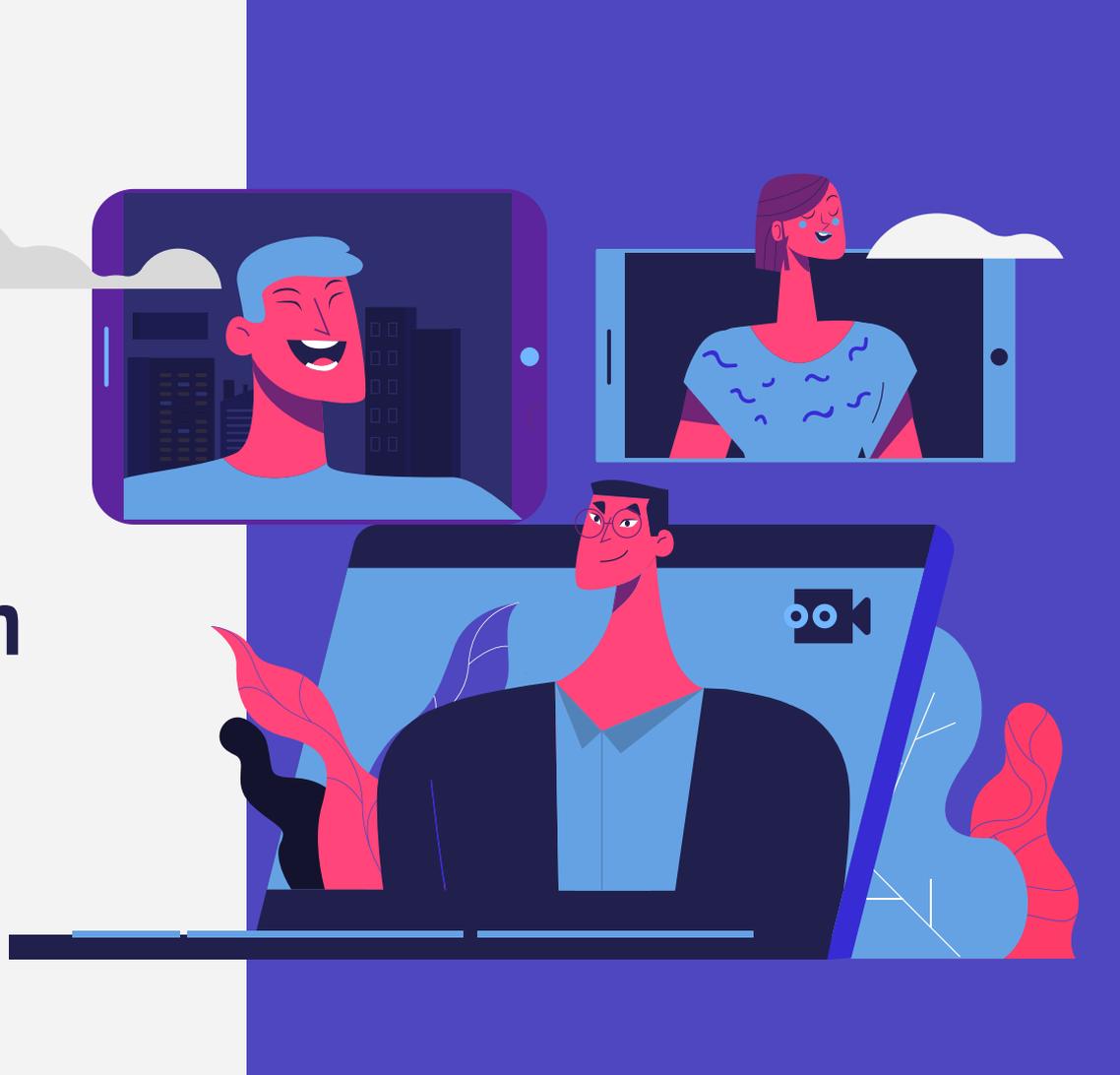


Team Lead Interviews Oct. 2019: Weekly Check-in Focus

Powered By



Study Objectives



Gain insight into team rituals and processes from the perspective of both the team lead and the team member



Gather insights into the attitudes and perceptions around weekly check-in both as a product and process



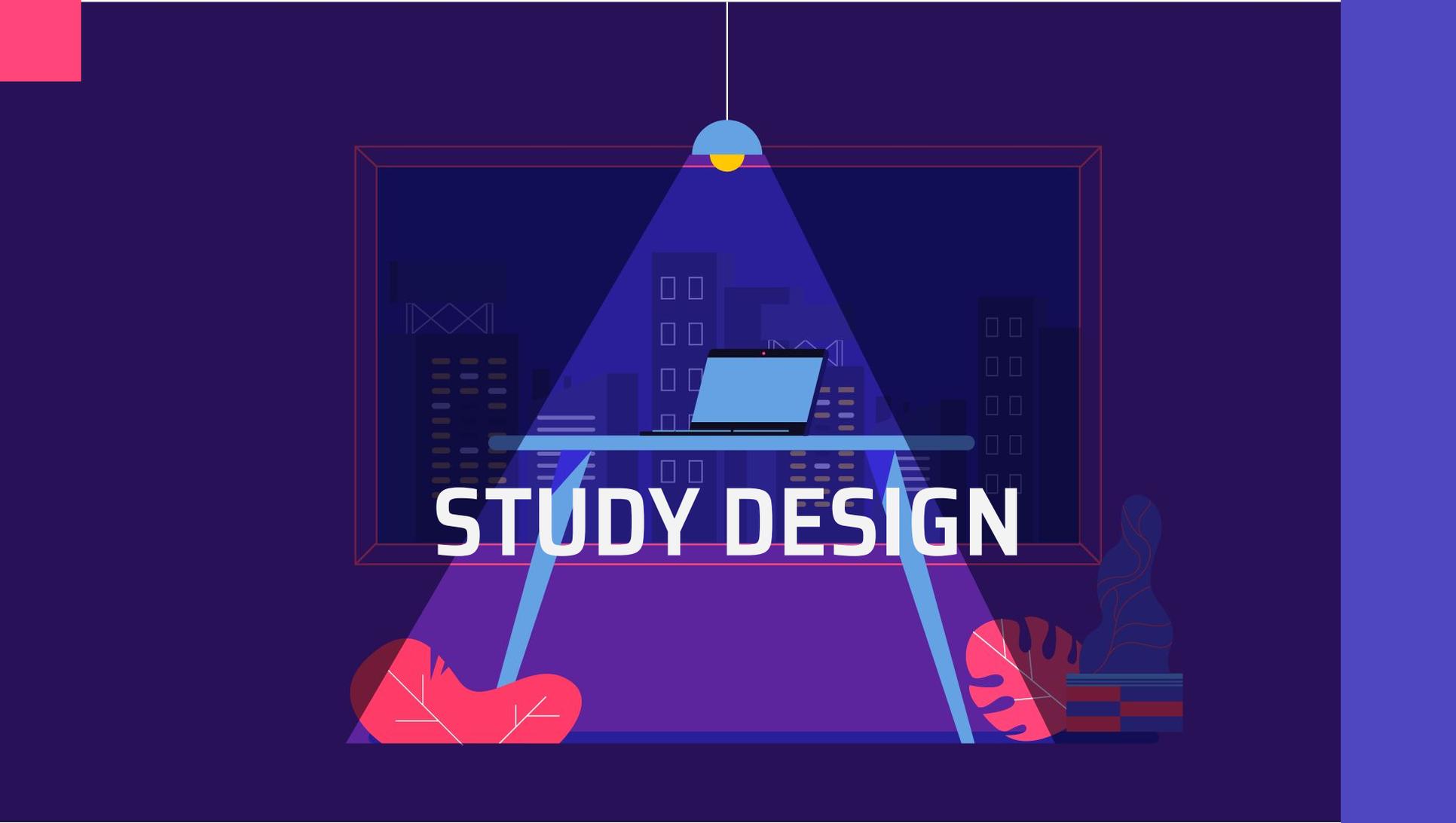
Concept test recently introduced features such as acknowledge, mark as done, and other UI enhancements



Identify user pain points with the existing experience in order to inform future versions of weekly check-in

Why Now?

1. The current design has been stretched to its limit. The new features clutter the UI and deter the experience
2. We have a lot of unanswered questions around how team leads are using weekly check-ins in conjunction with their other touchpoints/rituals
3. ADP is the biggest user of StandOut and can offer us the most insight into the user experience that we should be delivering, so why not talk to them!



STUDY DESIGN



What does the check-in cycle look like for team leads/team members?

How are team leads using the TMBC check-ins to inform interactions with their teams? Do they compliment check-ins any additional information and tools?

What are team leads' biggest management challenges? Does StandOut address them?

What is the relationship between a check-in and a 1:1 if any in the real world?

How does the usability of StandOut match up to the expectations of team leads and team members? Can we identify opportunities for improvement.

[Read Full Research Plan](#)





Research Team 🚀

Understand the key rituals, processes, attitudes, etc. they use to stay aligned with their team and ensure their team has what they need to do their best work.



Phases of the Study



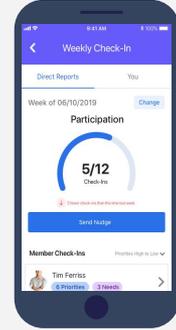
Interview

Understand the key rituals, processes, attitudes, etc. they use to stay aligned with their team and ensure their team has what they need to do their best work.



Shadowing

Have team leads go through their TMBC check-in form and dashboard to SHOW us how they read and act on the information presented.



Concept Testing

Show team leads an InVision prototype of our mobile check-in experience and check-in BMA in order to gauge usability on the new UI and see if the new features align with their needs





Ann, HR Services

Years at ADP: 15

Years as Manager: 10+

Team Size: 17



Victoria, Client Success

Years at ADP: 20

Years as Manager: 10

Team Size: 12



Gene, National Accounts/Migrations

Years at ADP: 23

Years as Manager: 15+

Team Size: 7



Adrian, Vantage Service Consultant

Years at ADP: 5

Years as Manager: 2.5

Team Size: 12

Participant Profiles (1-4)



Stephanie, Payroll Consultant

Years at ADP: 7

Years as Manager: 3+

Team Size: 4



Melonie, Client Success

Years at ADP: 16

Years as Manager: 16

Team Size: 9



Edward, Vantage Service Consultant

Years at ADP: 6

Years as Manager: 4

Team Size: 5



Brian, SMB Solutions Consultant

Years at ADP: 12

Years as Manager: 12

Team Size: 17

Participant Profiles (5-8)



KEY FINDINGS

There is a considerable gap between the kind of information the manager wants to extract from the check-in and what team members are providing that is largely due to poor onboarding and contextually appropriate tips

Interpersonal trust, StandOut onboarding, team member usage, and manager usage determine how WCI is integrated into the team lead/member relationship. Four engagement models emerged from the study

Key Findings

Overall comments is the most common way to interact with weekly check-in data.

Managers define how they engage with team members primarily based on tenure and personality while largely ignoring StandOut Strengths/Roles

Managers found loves and loathes to be the most useful part of the check-in, but also the most underutilized

The “acknowledge” feature was well received, but managers expressed they would use it to reinforce priorities they find exceptional or those they would like to see more of rather than for acknowledging each priority

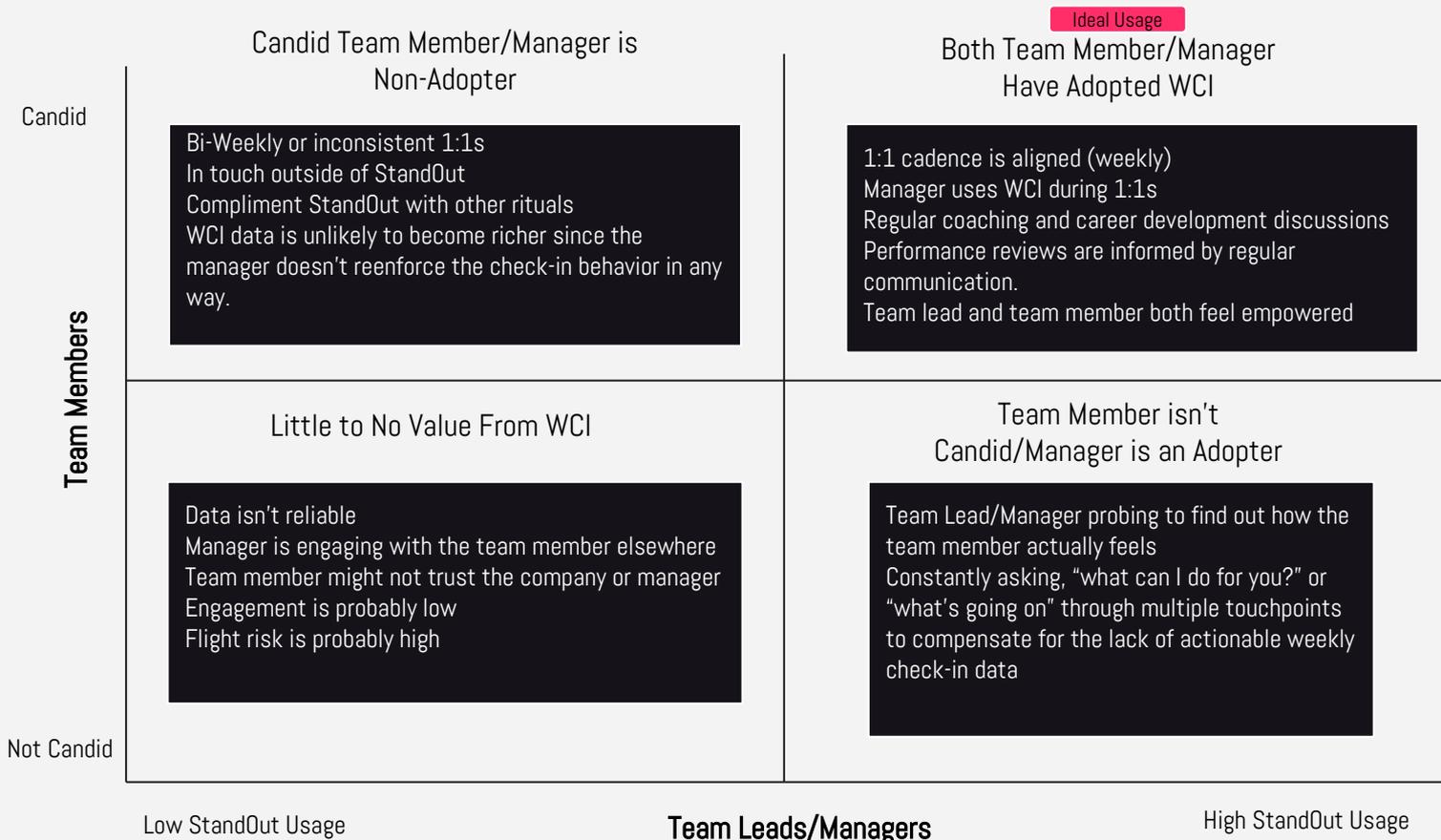
Managers Are Often Not Getting the Information They Need to Empower Their Team To Do their Best Work

Observation	Possible Explanation	Related Quotes/Videos
<p>They are getting “to do lists” instead of priority lists, which makes it difficult to react to the information</p>	<p>Team members aren't onboarded properly. Additionally, there is no place for managers to communicate their expectations or needs in the app</p>	<p><i>“I want to see meaningful things that I need to be aware of, not a to do list, which is what I often get.”</i> Recording Link (10:15)</p>
<p>Team members are not filling in the loathe section very often, but managers find this section to be very helpful</p>	<p>Fear of retaliation, a preference for communicating such matters in person, find the word “loathe” too strong for what they want to communicate.</p>	<p><i>“I feel if I put loathe it is going to be held against me.” - Recording Link (18:30)</i> <i>“I think people are afraid to put anything in there. I put in something once and my manager overreacted, so now I use it very sparingly. The wording seems a bit strong.”</i></p>
<p>They are often foregoing the needs section and instead opting to reach out when an urgent matter arises</p>	<p>Since most check-ins occur on Friday, listing needs for the subsequent week seem unaligned with how team members engage with their manager around their needs</p>	<p><i>“In particular what they need is what I would like to focus on.” - Link to Video</i></p> <p><i>“I want to see what their needs are first.”</i> -Link to Video</p> <p><i>“If I really need something, I’m going to call him.”</i> -Link to Video</p>
<p>Managers need to make judgement calls if a listed need is urgent or can wait until their 1:1</p>	<p>There is no way call out the most urgent needs.</p>	<p><i>“Not sure if I need to reach out of it can wait until our 1:1. Want to make sure my team feels I’m there for them.”</i> Recording Link (9:07)</p>

Managers leveraged the WCI differently based on the team member they were engaging with

Observation	Possible Explanation	Related Quotes/Videos
<p>The integrity of the manager/team member relationship was a key driver of weekly check-in participation</p>	<p>They didn't feel safe sharing what they needed. Manager failed to view or take action on needs/priorities.</p>	<p><i>"Brought up why they aren't checking in. Sparked a conversation around why she thought it was useless with her previous manager and resulted in a constructive conversation."</i> Recording Link (18:30)</p> <p><i>"Weekly conversations make the performance review (pulse) process so much easier."</i> Recording Link (9:45)</p>
<p>Team members don't receive adequate onboarding/training, which results in divergent ways of using the product and "plugging" it into their adjacent processes such as 1:1s</p>	<p>Managers and StandOut champions do not have the tools to effectively communicate and incentivize team members to adhere to the StandOut framework. Product doesn't account for variance in management needs.</p>	<p><i>"I just a checklist of things they did. Rarely do I get anything around career development. It's usually very tactical."</i></p> <p><i>"I have a high performer who just provides their strength/value pulse."</i></p>
<p>Managers use a variety of methods to extract the data they need from team members based on their adoption and proactivity in their WCI</p>		<p><i>"I ask them to come with the agenda. Don't refer to StandOut at all during 1:1s."</i> Video Link (1:23)</p>

Four Engagement Models Emerged From this Insight...



Overall comments is the most common way to interact with weekly check-in data

Observation	Possible Explanation	Related Quotes/Videos
<p>Managers often use overall comments as a way to provide affirmation that they viewed the check-in with statements such as “looks good” or “great work.”</p>	<p>Weekly check-in offers no interactions apart from commenting. Managers are also unaware how team members know if they read it or not.</p>	<p><i>“I’ll often put a reaction like “good job” or “great work.” Video Link (6:00)</i></p> <p><i>“I rarely use the comments at the priority level. I try to just react to everything presented and this is the easiest way to do it.”</i></p> <p><i>“Where is the overall comment? (in reaction to a prototype)</i> Link to Video</p>
<p>Managers that use weekly check-in during 1:1s tend to use overall comments to document action items or a summary of the outcome of their 1:1</p>	<p>The StandOut framework implies that weekly check-ins are designed to inform 1:1s.</p>	<p><i>“I just see a checklist of things they did. Rarely do I get anything around career development. It’s usually very tactical.”</i></p> <p><i>“I have a high performer who just provides their strength/value pulse.”</i></p>
<p>There is a tendency to use overall comments even when referring to specific items such as priorities, needs, or love/loathes</p>	<p>It is perceived as tedious or time consuming to use priority specific comments. There might also be uncertainty around the visibility of them for team members.</p>	<p><i>“Even if I’m referring to a specific part of the check-in, I will use the overall comment button”</i></p>

Managers define how they engage with team members primarily based on tenure and personality while largely ignoring StandOut Strengths/Roles

Observation	Possible Explanation	Related Quotes/Videos
Team leads tailored their management style based on the tenure/experience level of the team member	Team leads are unsure how to leverage StandOut roles	<p><i>"John is not as confident because he came from another area, so I take that into account when looking at his check-ins"</i> Video Link (1:00)</p> <p><i>"I don't come with an agenda. I just want them to know that I am here for them, especially if they are a high performer."</i> Recording Link(7:25)</p>
When team members didn't enter much information into their check-ins consistently, team leads had to spend additional time probing into what they are doing and often find themselves spread across multiple touch points	Team members don't understand the value or don't believe that their manager will do anything with the information. They may have also had a team lead who didn't adopt StandOut and therefore fell out of the habit of checking in with them.	<p><i>"They tend to put very little in their check-in, so I need to have a talk to them about it."</i> Video Link (4:10)</p> <p><i>"My highest performer only enters their strengths/value pulse, but I know they are doing well."</i></p>

Managers found loathes and needs to be the most useful part of the check-in, but also the most underutilized

Observation	Possible Explanation	Related Quotes/Videos
While team leads find loathes the most useful entry point to a meaningful conversation, the term seems to deter team members from using it		<p><i>"I think people are afraid to put things there." I put something here and my manager called me out....Loathe is a strong word...something that was inconvenient that week that didn't have to happen." "I got scared off using loathe. I don't put anything there that isn't profound."</i></p> <p><i>"Use loathes as an entry point to constructive conversations around changing their perception or taking meaningful action."</i> Recording Link (18:10)</p> <p><i>"I get a lot of N/A responses, but those that do complete it, I get a lot of insight into what their real challenges are."</i> Recording Link (11:40)</p>
Team leads looked for patterns in loathes in order to identify topics for monthly/quarterly 1:1 deep dives or other more formal performance/engagement related meetings		<p><i>"I look for patterns in the loathes in order to decide what I should talk about during 1:1s."</i> Recording Link (19:20)</p>

Managers found loathes and needs to be the most useful part of the check-in, but also the most underutilized (cont.)

Observation	Possible Explanation	Related Quotes/Videos
Team leads often address needs right away outside the context of a 1:1 due to urgency and frequency of 1:1s (once every two weeks)		<i>"We can't afford to wait sometimes. I'll address them (needs) as they come in person, via email, etc."</i> Recording Link (9:07)

The “acknowledge” feature was well received, but managers expressed they would use it to re-enforce priorities they find exceptional or that they would like to see more of rather than for each one

Observation	Possible Explanation	Related Quotes/Videos
Acknowledge feature was perceived as a low friction way to provide feedback and fuel discussion during 1:1s/other touch points		<i>“It’s a kind of feedback and then you can talk to it during your standup meetings.” - Video Link</i>
Team leads would use the thumbs up/acknowledge function to re-enforce listing needs that align with their expectations		<i>“A lot of times I am getting priorities that don’t add much value. If I saw priorities that aligned with their development, I would be inclined to give it a thumbs up.” - Video Link</i>
Team leads viewed acknowledgement as something that would only be done to some priorities as oppose to an action at that they would take on all of them		<i>“I don’t feel I would acknowledge every one of them.” Video Link</i>



**Additional
Findings**

Weekly Check-In Concept Reactions

Observation	Possible Explanation	Related Quotes/Videos
<p>Acknowledge feature was perceived as a low friction way to provide feedback and fuel discussion during 1:1s/other touch points</p>	<p>Team leads may not have a comment, but feel that they would like to provide some sort of feedback or reaction</p>	<p><i>"It's a kind of feedback and then you can talk to it during your standup meetings." - Video Link</i></p>
<p>Team leads would use the thumbs up/acknowledge function to re-enforce listing needs that align with their expectations</p>	<p>Team leads aren't getting the kind of information need to make informed management decisions, so a thumbs up allows them reinforce desired behaviors</p>	<p><i>"A lot of times I am getting priorities that don't add much value. If I saw priorities that aligned with their development, I would be inclined to give it a thumbs up." - Video Link</i></p>
<p>Team leads viewed acknowledgement as something that would only be done to some priorities as oppose to an action at that they would take on all of them</p>	<p>They may want to react to the check-in using the overall comment feature instead</p>	<p><i>"I don't feel I would acknowledge every one of them." Video Link</i></p>
<p>Team leads needed a more "personalized" nudge functionality in order for it to be useful. Specifically, pairing adoption data (date of last check-in) with the ability to nudge individuals would make this feature more powerful.</p>	<p>Team leads have additional context around the team members experience that would make them hesitant to use a bulk remind feature that could possibly distract or worse, annoy the team member.</p>	<p><i>"I'd love to see there last check-in date. I want the person who hasn't checked-in for the longest amount of time should be at the top" Video Link</i></p> <p><i>"Why would I nudge them if they are on vacation?" Video Link</i></p>

Team Rituals and Cycles

Observation	Possible Explanation	Related Quotes/Videos
<p>Fridays are the most common day to complete check-ins (for both team members and team leads)</p>	<p>This conditioning most likely comes as a result of the scheduler. For a variety of reasons, this may not be the best time to fill out a check-in.</p>	<p><i>"I get most of my check-ins on Fridays."</i></p>
<p>By Tuesday, check-ins are considered to be "late."</p>	<p>Team leads try tend to review check-ins on Mon./Tues. and tend not to go into StandOut until Friday.</p>	<p><i>"I typically have my 1:1s early on in the week, so Tuesday is considered late."</i></p> <p><i>"I'll have a few check-ins trickle in on Tuesdays and Wednesdays."</i></p>
<p>Team leads that do not leverage WCI during 1:1s tend to meet with their team members every two weeks. Additionally, teams with over 10 members tended to have 1:1s every two weeks due to a lack of bandwidth.</p>	<p>They feel that informal touchpoints address needs/priorities and/or their teams are too large to schedule meetings with each one of them each week. Alternating 1:1s was a common pattern.</p>	<p><i>"I feel that I am in touch with them all of the time."</i></p> <p><i>"I alternate doing 1:1s with each half of my team every week."</i></p> <p>Recording Link (6:30)</p>
<p>Team leads perceived that they spent about 50% of their time communicating</p>		<p><i>"I spend about half of my time with communicating and engaging with my team, but I would like to spend even more time if possible."</i></p>

Team Lead Empathy Map

Think and Feel

I am scared to put anything under loathe, but I know is' where the best conversations from.

I want to know what is blocking my team from delivering

Can't treat all members the same. Tenure and personality change I engage with them.

Can't treat all members the same. Tenure and personality change I engage with them.

"I know we aren't hiring. I don't feel I have job safety.

I have a good relationship with my team, so I trust they are being candid in their WCI

Only need to know high level priorities, not everything.

Reports with poor relationships with their manager don't check-in or do so less often.

"If I need anything, I'll reach out."

"I don't feel comfortable sharing what I loathe."



Some of my HiPos only provide strength/value pulse

See

Hear

Don't have time for 1:1s. I'll reach out if I need something.

"I'm here if you need me."

"Staying in touch frequently makes performance reviews easier."

Nudges or discusses participation after two weeks of no WCI

Looks at loves and loathes to identify patterns

Look at needs

decides if they need to address needs right away or if they need to wait.

Say and Do

How Might We

- Provide team members with the appropriate tips and training to provide priorities that are useful and actionable to team leads?
- facilitate the sharing of loathes?
- Create a way to share needs in a way that is aligned with how team members currently share their needs?
- How can provide a way to clearly differentiate urgent needs vs. those that can wait?
- Educate team members on the impact of the StandOut framework?
- Onboard team members in a holistic fashion?
- Provide team leads with a simple way to provide reactions to a check-in?
- Create a clearer connection between WCI and 1:1 meetings?
- Surface patterns in loves and loathes periodically to team leads in order inform constructive conversations?
- Make it clear to team members that their check-in is being viewed by their team leads?
- Help managers make informed nudges?
- Create a notification strategy that aligns with how teams use WCI?



Next Steps

- Ideate on how we might address the questions that came out of research
- Visualize our current learnings about the team lead journey
- Create concepts that aim to address the unmet needs that arose out of research
- Set up UX benchmarks/analytics based on research outcomes/business objectives





The End