

Team Lead Interview Discussion Guide

Objectives

- Gain insight into team rituals from the perspective of both the team lead and the team member.
- Understand how the teams interviewed at ADP leverage weekly check-in in order to see if the product aligns with how work gets done.
- Gather insights into the attitudes, perceptions, and pain points surrounding weekly check-ins both as a product and process.
- Identify opportunities to streamline the UI and add value to both of our user types that can be incorporated into the re-design of weekly check-in.
- Establish a benchmark for the current UX of TMBC's weekly check-in.
- Concept test some of the newer features and gather feedback on new concepts.

Research Questions

Question	Method
What does the check-in cycle look like for team leads/team members?	User Interviews
How are team leads using the TMBC check-ins to inform interactions with their teams? Do they compliment check-ins with this sort of information?	User Interviews/Contextual Inquiry
How do team leads go about facing challenging situations with their team members?	User Interviews
How do team members go about challenging professional situations? Do they voice concerns to their manager? If so, what factors help drive an effective and constructive conversation?	User Interviews
What are team leads' biggest management challenges? Does StandOut address them?	User Interviews/Contextual Inquiry
What is the relationship between a check-in and a 1:1 if any?	User Interviews

What is the check-in ritual like from the perspective of the team lead and team member? Are there any gaps?	User Interviews
How is StandOut perceived by both the team leads and team members?	User Interviews/Surveys
How were users on boarded onto StandOut? Did they perceive it as effective?	User Interviews
Are there any artifacts that team leads or team members use to enhance their workflow?	User Interviews/Contextual Inquiry
How does the usability of StandOut match up to the expectations of team leads and team members? Can we identify opportunities for improvement.	Usability Testing
Are there any team rituals/processes that are done in parallel or conjunction with weekly check-in?	User Interviews
To what degree do team members feel "safe" when using check-ins? What role, if any, does trust and confidentiality play?	User Interviews/Surveys
What is this group's mental model around a team? Do they understand the difference between an agile team and an org unit team?	Usability Testing
How do team leads and team members feel about some of the newer features introduced to Lifion StandOut? Do they solve any existing needs for them?	Usability Testing

Business Objectives

- Streamline the key processes that team leads need to engage in order to engage with their team in order to increase the likelihood that they will use StandOut.
- Deliver a holistic experience that truly increases employee engagement and accelerates performance.
- Establish UX benchmark from which we can measure the Lifion TMBC product suite from.

UX Metrics

Metrics	Measures	Type
Adoption	Increase total check-in submission by X%	Behavioral
	Increase connection rate by X%	Behavioral
	Reach 50% acknowledged priorities	Behavioral
	Reach 50% resolved needs (marked as done)	Behavioral
Trust	Trust metric (self-reported)	Attitudinal
	Perhaps we can measure this through strengths and value pulse	
Insightful	Responses to the statement, "Weekly check-in gives me insights into my team I might not otherwise."	Attitudinal
	Responses to the statement, "Weekly check-in provides actionable and easy to understand coaching tips."	Attitudinal
Satisfaction	# of support tickets	Behavioral
	Responses to the statement, "I feel Weekly Check-In makes me a more effective team lead."	Attitudinal

Methods

- Usability testing
- User Interviews (individually)
- Contextual Inquiry in meetings

Equipment Checklist

- Recording app on iPhone (oder I think)
- Selfie-stick tripod (needs to be charged).
- Notebooks and pens
- Bluejeans recorder
- InVision app downloaded
- Chargers throughout the day
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Team Lead Interview Script

Initial Rapport Building

Hello (participant name), my name is David from Lifion. The goal of this interview is to better understand your experience as a team lead in your day to day work. In particular, we will explore the rituals, processes, paradigms, and workflows you use regularly as a manager. Additionally, since we are part of the StandOut team at Lifion, we will also delve into your usage and attitudes towards the TMBC StandOut products. We will also show you some partially functional prototypes. It's important to note that there are no right or wrong answers here. We are here to learn about your experience as it is. When testing products, we are testing the product and not you, so there is no need to be apologetic or frustrated if something doesn't work the way you expect it to. Rather, we ask that you think out loud in order to give us insight into what is going on in your head.

Apart from going through some questions, we might ask you to show us how you go about certain tasks on your laptop, notebook, etc. The goal here is to understand how you ACTUALLY go about accomplishing a particular task, so be sure to be as detailed and candid as possible. We are here to learn about you, not pass judgement on your processes.

Initial Icebreaker Demographic Questions

- How long have you been a team lead?
- How many reports do you have? Is this the most you've ever had?
- Which of the following activities do you engage in with your team?
- How long have you been using StandOut
- Have you ever received leadership training? If so, to what extent? Did you find it to be effective?
- What are your StandOut Roles?

Interview Questions: Team Lead

- Can you share what your transition from being an individual contributor to manager was like?
 - ◆ Did you receive any training?
 - ◆ In retrospect, what questions or advice would you give first time managers?
 - ◆ Was there anything you learned along the way that has made you a better manager?
- How many teams are you a part of?
- Can you describe the makeup of the people in your various teams? Do you use any particular term to describe these teams?
- Shifting gears to the present, what processes/activities do you currently engage in with your team? These can be formal processes mandated by the organization or informal ones you implement independently?
 - ◆ What do you get out of these activities? Which do you find most valuable?
 - ◆ What do you feel could be improved about these processes/activities?

- ◆ Approximately, **how much time** do you spend on engaging with your team, reporting findings to the organization, analyzing findings, etc.?
 - How much time would you reasonably like to spend on these activities?
- ◆ Do you conduct 1:1s? If so, can you walk me through your process for carrying those out?
 - How much time do you spend?
 - How do you determine what to talk about?
 - What is usually the subject matter?
 - How often are they an arena for uncomfortable, yet constructive conversation?
- As a team leader, what do you want to know about your team on a regular basis?
 - ◆ Are you acquiring this information?
 - ◆ Challenges?
 - ◆ How are you using the information that you acquire?
 - ◆ Do you document this information anywhere?
- Can you think of an instance in which you acquired information from StandOut or other means that helped inform your behavior as a manager?
- What concerns/worries do you have about your team's development/sentiment? How do these issues impact your team and the organization at large?
- If you could wave a magic wand, what kind of support would you like to have to help you be a better manager?
- I want to transition more to your usage of StandOut's Weekly Check-In...Can you walk me through the last memorable week you've had using weekly check-in?
 - ◆ When do you typically look at check-ins? When are they usually coming in?
 - ◆ What do you look for in a check-in?
 - ◆ Can you show me what you would do if one of the priorities need to be modified?
 - ◆ Do you feel that your team members answer candidly in their check-ins?
 - ◆ On a scale of 1-5, how do you respond to the statement, "I feel safe to express myself candidly in my check-in."
 - Can you explain your answer?
 - ◆ How many of your team members submit weekly check-ins at least 3 times a month?
 - ◆ How many priorities do your team members typically have?

Experience as a Team Member While You are a Team Lead Questions

- ◆ On a scale of 1-5, how do you respond to the statement, “I feel safe to express myself candidly in my check-in.”
 - Can you explain your answer?
- ◆ Can you recall a recent time you had something important to share with your team lead? How did you go about that?
- ◆ How do you respond to the statement, “I feel like I get enough feedback from my team lead.”
- ◆ How do you respond to the statement, “I feel like I get enough guidance from my team lead.”
- ◆ How do you respond to the statement, “I feel safe sharing how I feel with my team lead.”
- ◆ I want to transition more to your usage of StandOut’s Weekly Check-In...Can you walk me through the last memorable week you’ve had using weekly check-in?
 - When do you typically fill out your check-in?
 - How many times a month do you complete a weekly check-in?
 - Have you ever interacted with your team lead via the weekly check-in app? If so, can you share a recent experience of doing so?
 - Is there a particular part of the check-in you find to be more valuable than the rest?
 - Can you share what kinds of priorities or needs you tend to put in your check-in?
 - What is the scope of the priority? Can it be completed in a week?
 - How many priorities and needs do you typically enter?
- ◆

Team Lead Usability Test Script Weekly Check-In

- Show team lead dashboard with more realistic metrics, pay special attention to the acknowledge functions and mark as resolved.
- Show a roundup email to see if that is helpful.
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Background

Imagine you just got an email asking you to complete your weekly check-in. Using this phone please walk through the weekly check-in experience. Keep in mind that this is a functional prototype, but you will not be able to fill it in. As you are doing this, please remember to think out loud so we can know what are thinking and feeling as you go through this. Once you feel you have finished, you can simply stop.

Team Lead Usability Test Script Team Lead Dashboard

Background

I want you to imagine that you have received notice that your reports have all checked in. Please look at these screens and go through the check-ins as you normally would. This is a prototype, but it is only partially functional. Please think out loud, share what you think some of the functions do, what you might expect them to do, poke around, and share your thoughts along the way.

Team Member Interview Script

Initial Rapport Building

Hello (participant name), my name is David from Lifion. The goal of this interview is to better understand your experience as a team member in your day to day work. In particular, we will explore the rituals, processes, paradigms, and workflows you engage in as a team member. Additionally, since we are part of the StandOut team at Lifion, we will also delve into your usage and attitudes towards the TMBC StandOut products. We will also show you some partially functional prototypes. It's important to note that there are no right or wrong answers here. We are here to learn about your experience as it is. When testing products, we are testing the product and not you, so there is no need to be apologetic or frustrated if something doesn't work the way you expect it to. Rather, we ask that you think out loud in order to give us insight into what is going on in your head.

Apart from going through some questions, we might ask you to show us how you go about certain tasks on your laptop, notebook, etc. The goal here is to understand how you ACTUALLY go about accomplishing a particular task, so be sure to be as detailed and candid as possible. We are here to learn about you, not pass judgement on your processes.

Initial Icebreaker Demographic Questions

- How much professional experience do you have?
- Which of the following activities do you engage in with your team/manager?
- Have you ever received career coaching before or taken any professional development courses?
If so, what were they?
- How long have you been using StandOut?

→ What are your StandOut Roles?

Interview Questions: Team Member

- How many teams are you a part of?
- Can you describe the makeup of the people in your various teams? Do you use any particular term to describe these teams?
- Can you walk me through a typical week in the life within your team? Feel free to mention key meetings, rituals, workflows, etc.
 - ◆ Do you need to communicate your priorities to your team lead? Do you find this helpful? If applicable, how did you do this before having the weekly check-in app?
 - ◆ Do you engage in regular 1:1 meetings with your team lead?
 - What is the content of those 1:1s?
 - How do they feel from your perspective?
 - How long are they typically?
- Can you recall a recent time you had something important to share with your team lead? How did you go about that?
- How do you respond to the statement, "I feel like I get enough feedback from my team lead."
- How do you respond to the statement, "I feel like I get enough guidance from my team lead."
- How do you respond to the statement, "I feel safe sharing how I feel with my team lead."
- I want to transition more to your usage of StandOut's Weekly Check-In...Can you walk me through the last memorable week you've had using weekly check-in?
 - ◆ When do you typically fill out your check-in?
 - ◆ How many times a month do you complete a weekly check-in?
 - ◆ Have you ever interacted with your team lead via the weekly check-in app? If so, can you share a recent experience of doing so?
 - ◆ Is there a particular part of the check-in you find to be more valuable than the rest?
 - ◆ Can you share what kinds of priorities or needs you tend to put in your check-in?

- What is the scope of the priority? Can it be completed in a week?
- ◆ How many priorities and needs do you typically enter?
- ◆ On a scale of 1-5, how do you respond to the statement, "I feel safe to express myself candidly in my check-in."
 - Can you explain your answer?
- ◆ Do you know if your team lead looks at your check-in? How? Can you show me?
- ◆ How often would you say you connect with your team lead? Does this feel like it is enough for you?
- ◆

Team Member Usability Test Script

- New weekly check-in? The goal is to get UX benchmark compared to current experience
- Show team members the new output of the desktop experience. Focus on validating overall comments,