

# A User Guide to Working With

**Jane the Account Coordinator**

*Full Name Here*

## About This User Guide

It is said, "All disappointment is rooted in an unmet expectation."  
But was that expectation spoken? Just assumed? Clear? Understood? Reasonable?

This User Guide is an exercise in making our assumptions explicit. The purpose of this guide is to accelerate the time it takes to work enjoyably and successfully together. This process allows each of us to develop a "roadmap" for an optimal working relationship by drafting and discussing expectations, offering insights into our working style, and describing practical ways to work with each other.

This worksheet is intended to serve as a resource to return to during check-ins, performance reviews, or points of conflict, and it will be shared as part of employee onboarding to allow new teammates to expedite the process of learning communication styles, personality preferences, and work rhythms. The goal of this exercise is to create a helpful, healthy, and equitable resource for collaboration and team dynamics, so honesty and candor are appreciated.

## COMMUNICATION STYLES



*How would you describe your verbal communication style?*

I'm more of an internal processor, so once I've had a chance to think through something, my verbal communication style tends to lean toward lots of questions for clarity sake. I value honest and clear, direct communication, but I try to balance and soften that with empathy.



*How far in advance do you prefer requests for assistance or tasks?  
How should these be delivered (verbally, via email, via Slack, etc.)?*

There's no such thing as a request "too early"! Since the communications team operates on a somewhat predictable cadence of work and deadlines, it's easier for us to plan new requests and new work if we have sufficient lead time. Having a "paper trail" via Slack or email is the best way to ensure that something doesn't get lost.

## PACE AND WORK RHYTHMS



*What work rhythms or routine deadlines should your team or colleagues know about?*

Our standard communications deadlines for social media planning, emails, and publications following a fairly consistent pattern of deadlines, so we're almost always going to feel the crunch of work at the end of the week, end of the month, and end of the quarter. For new initiatives or ideas, aiming for the beginning of a work cycle is ideal (and appreciated!).



*If flexibility allows, when are the best days/times for meetings or collaboration? When do you prefer focused or deep work? Are there any days or time blocks where you are unreachable for work (e.g., Sabbath practices, intentional time away)?*

Based on this new hybrid work model, I'm in the office on Tuesdays and Thursdays, and generally try to hold off on scheduling "deep work" during these times so I can be most available for meetings and collaboration. Mondays and Wednesdays are for writing and editing, and I try to structure Fridays for catch-up work, final deadlines, and meetings with external constituents. If at all possible, I try to avoid work on Saturdays.



*What are your pet peeves working in the office?  
What are your pet peeves working remotely with a team?*

In the office: loud music (hello, headphones!); dirty dishes left in the common area/sink

Remotely: not including a meeting link in a calendar invite; eating food on a call (boo!); not having a clear meeting agenda or outline to facilitate discussion from the full group



*How will your colleagues and teammates experience you if you are stressed?*

When I'm stressed, I tend to come off very short and overly direct. I won't have much time or margin for side conversations, and I'll likely ask for extensions on project deadlines that aren't eminently critical.

## RECEIVING AND GIVING FEEDBACK



*How do you prefer to receive feedback? Does this depend on whether the feedback is positive or constructive?*

Ideally, either form of feedback would start as a conversation (rather than waiting for semi-annual reviews to see them in writing). For issues that are negative/constructive that are part of a specific project (as opposed to my general working style), let's address those as soon as possible so that I can fix them. For positive feedback, I really appreciate notes or emails that I can hang on to in order to remind myself of them later on.



*When is the best setting or timing for feedback?*

Similar to the above, it somewhat depends on the issue, but generally sooner is better. I try to live by the motto that no one should be surprised by bad news, so let's get things out in the open as soon as possible and figure out a way to address discrepancies in expectations.



*How do you respond to feedback at your best and at your worst?*

At my best I'll likely already recognize the issue; at my worst, I'll likely become defensive or have some "excuses" that are little more than personal attempts at softening the blow.



*How do you offer feedback to others at your best and at your worst?*

This one is tougher for me since I've been working through my (somewhat challenging) relationship with conflict and reading books like *Crucial Conversations*. I try to be open and quick with positive feedback since that seems helpful for most people. For negative feedback, I try to disassociate myself from the person and focus on the issue to be addressed, as well as help brainstorm solutions or ways to avoid similar outcomes in the future.

## ENCOURAGEMENT AND APPRECIATION



*How do you prefer to receive encouragement and appreciation (e.g., verbally, publicly, privately, gifts)?*

Verbal recognition never hurts, particularly if there's a larger group to celebrate or if we've successfully undertaken new work or multiple deadlines/projects at once. I'd much prefer a considerate note to a gift.



*When do you most need encouragement as it relates to your work?*

Whenever I'm trying something new or leading the team through new initiatives, encouragement is always appreciated.

## HANDLING MISTAKES



*How do you respond when you make a mistake privately?*

*How do you respond (similarly or differently) when you make a mistake publicly?*

Eh, this is a tough one! If I make a mistake privately, I usually try to address it as quickly as possible before bringing it up to any relevant colleagues. When mistakes are more public (like bad links in emails or typos on blog posts), I try to own up to them and correct them sooner than later. But either one takes a hit to my professional pride.



*How do you communicate a colleague's mistakes to them?*

When I'm at my best, I try to situate the conversation as a way to learn and grow professionally and determine what went wrong. Was it an issue of clarity? Lack of sufficient time? The need for more training? I address the issue with the colleague (typically someone who reports to me) and work on a plan to mitigate the same mistake in the future. If this is part of a broader, repeated pattern, we'll often work something into a semi-annual review or performance plan so there's a built-in deadline for addressing it in the future.

## WORK FRUSTRATIONS AND TRUST



*Think about your internal reactions and frustrations with regard to the work patterns of others and situations that they manage. What erodes trust in your colleagues and frustrates your own work?*

A few thoughts: failing to follow through on what you said you would do; leaders who shift the blame to their teams; lack of planning that leads to missed deadlines or scrambling at the last minute; not providing sufficient time to think through new projects, processes, or ideas.

## AREAS OF GROWTH



*What areas of growth are you pursuing (or what to pursue) professionally?  
Relatedly, what areas of growth are you pursuing personally?*

Professionally: I'm working through a certification in project management! I'm also trying to get better at coding so more of our digital needs can be addressed in-house.

Personally: I'm learning to speak French along with my son!

## BEST PRACTICES AT WORK



*How do you approach new projects, teams, or situations? (e.g., Do you dive in and begin engaging right away? Or sit back and observe for a while?)*

I generally prefer the opportunity to research new ideas, projects, or situations so I can formulate an informed idea or plan to move forward. I usually love new initiatives and the variety that it brings to our work, so I'm probably somewhere in the middle between diving in right away and observing.



*What should your colleagues and teammates know about your specific role, personal strengths, or areas of weakness?*

I lead our team of account coordinators, so a lot of my work is in project management and facilitation. However, I'm also assigned some specific account work, so I try to balance my availability to my team with the needs of my accounts. I miss my old work of writing and editing, so I'm usually happy to take on projects like that for a bit of variety, if my calendar and task list allows.



*What feedback have you received in past meetings, reviews, or peer conversations that would be helpful for your team to know?*

I've been told that my probing questions can be off-putting to people, so I'm working on this!

## PERSONALITY AND QUIRKS



*Are you an introvert, an extrovert, or a bit of both? How does this show up in your work and communication?*

I'm a high introvert, so this usually shows up as a preference for quiet "deep work," feeling drained by too many conversations in a short amount of time, and some hesitancy to blur personal and professional lines of communication.



*How do you prefer to process information? Internally/reflective, or externally/verbal?*

I'm definitely an internal/reflective processor, so I always appreciate time to think about things on my own before formulating or sharing ideas or feedback.



*Share a bit about your personality type and how that impacts your work and relationships (think enneagram, MeyersBriggs, StrengthsFinder, emotional intelligence assessments, etc.).*

I'm an enneagram 1 (reformer); ISTJ on MeyersBriggs, and for StrengthsFinder: Achiever, Analytical, Relator, Deliberative, and Discipline. These traits tend to serve me well in roles like group facilitator, project management, and leading the ideation/initiation stages of different projects.



*What quirks have your roommates, family, or close friends experienced that would help your team to know you better?*

I like things neat and orderly; "like" might be an insufficient description! I try to keep my areas (physical, digital, etc.) in order, and I get frustrated when others don't follow suit. But I'm learning that it's not up to me to manage other's work, so I'm holding this idiosyncrasy loosely.



*Are there any questions you wish we would have asked? If so, what should we have asked, and how would you answer?*

"What's your favorite kind of snack to have around the office?"  
Yogurt and granola, fresh fruit, and Reese's peanut butter cups!



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