

## 4.3 Coping – review and take stock

### Slide 1

The longer we work on something without a break, the harder it can be to take a step back and be objective about what's working or not, and whether we should be working on some things at all! If we lose that objectivity, things can seem stressful, and we run the risk of wasting time and being inefficient. In this presentation, we'll look at some ideas to help you periodically stop and do some stock-taking and regain your objectivity.

### Slide 2

As researchers, we are inevitably working on projects of some sort. A project is a time-limited piece of work, with key deliverables, defined resources and must be completed to a defined standard by a certain date.

Papers, reports, proposals, collaborations, research contracts, fellowships... Many of the things we are doing are tightly constrained by resources, time, expectations of quality and so on.

Conversely – we are doing research, which is ever-expanding, never ends, and the more we do, the more we realise we could do. If we answer a research question, we find more to answer. When we read a paper, we learn about several more that we now want to read. The same is true for admin tasks – when we answer an email, we get replies, and the work expands.

Depending on our personalities – just thinking about these two aspects of our role can be stressful: some of us feel frustrated by the restrictions of deadlines and resource availability, while others might be reassured by some rules and certainty. Conversely, those of us who need certainty find the unknown and changing nature of research to be stressful.

Our work is messy, and it doesn't necessarily work out as we expect, and we need to be responsive enough to react and adapt to its changing nature. We can't change either of these things, but as effective researchers, we need tools to be able to navigate the tension between these two aspects: the constrained requirements of work on projects and the ever-expanding and changing nature of our work.

### Slide 3

To help us manage the tension between projects and research, we need to stop, review, reframe and revise.

Developing research ideas, projects, research teams, our careers, leadership and collaborations... everything we do requires constant learning. And so actively engaging in Kolb's learning cycle helps us to manage the projects versus research tension that was introduced in the previous slide. We can start at any stage of the cycle, but here we will start by having a plan.

There should always be a plan. Elsewhere in this online resource, we have seen that resilient people tend to be forward-looking and have long term goals and plans.

We need a plan to help us understand WHY we are doing what we're doing, what we will have when we get there and how we will get there.

In order to learn, we must then take some action and have a learning experience. We collect data and observations – literally in our research, but also about ourselves in the process of doing things.

Following the activity or experience, we must then pause to reflect: what worked or didn't work, what behaviours or skills or processes were used, and how effective were they? We might also reflect on whether the plan we were trying to implement was the correct one or whether we should be aiming somewhere different in future. What's really important here is to be reflecting on what is working well and why – so that we can build on those things (and it helps us to defeat our inner critic!).

Once we have gathered our data and reviewed it, we can then conceptualise it and draw some conclusions. We might apply some known theories or models to help us make sense of the learning and move on. Or we might talk to a mentor or coach who can help us to put our learning into perspective.

Finally, we then adapt our plans to take account of our learning. Crucially, the adapted plans might be to stop doing something that is no longer required, redefine our desired outcomes, change processes or make efficiencies. This enables us to better manage that tension between the nature of projects and research.

We tend to have preferences for different phases of this cycle – some of us prefer to be planning or in action but if we neglect the reflection and review, we can be unaware of the bigger picture and changing landscape and run the risk of heading in the wrong direction and wasting time and effort.

If our preference is for the reflection and review side, then we might also waste time and opportunities because we delay taking action until our ideas are perfect.

#### Slide 4

A really useful concept that helps you to apply all of this is Horizon planning. Stephen Covey's seven habits of highly effective people include the habit: 'begin with the end in mind'

We need to be able to articulate where we want to be, what we will have when we are there and why we want to get there. But from this viewpoint, it is too far away to be able to plan in detail.

What we can plan is how to get to the next horizon or milestone. We can see this clearly, and we can see the terrain. We know what we need to get there and how things will look.

When we get to that milestone, we must stop, take stock, review, reflect and re-plan (in other words, engage in the learning cycle). We have gathered knowledge about the terrain, and we can see our endpoint more clearly now. We can now make some more informed and detailed plans for what we need to do in order to get there.

At the next horizon, we stop again and review. We regroup and get our project back on track, and in the valleys, we let the research and work take its course, expand and go off track, and we gather data to review and make improvements for how we navigate the next valley.

#### Slide 5

When we get to this milestone, the data we have gathered about ourselves, or research, or the wider landscape might lead us to change our final destination. If we have taken time to stop and do an effective review, we can then adjust our plans toward the new destination. Without the review, we could run the risk of continuing on our old journey and ultimately wasting time.

If we are working on a short-term project or in a fast-paced and changing environment, then we should make these horizon reviews very frequent – possibly even weekly or daily. On longer-term and slower-paced projects, like our career development, then once every 6-12 months might be adequate.

The review and stock take needn't be onerous. We will now practice a useful tool that can help with this stock take at each milestone.

If you have time to engage with this fully, find yourself a pen and paper, and we are going to practice a short exercise to help you to review a project or task you are currently working on. Or you could review your career in general.

#### Slide 6

Think of a current project or goal you are working towards – something you have already begun working on. It could be long or short term. It could be your career in general.

Take your pen and paper and get ready to do some reflective writing. You will work your way through a series of questions to do a short review. You will have around a minute of quiet time to answer each question.

Before we start, write down the aim or objective for your project: what is it that you are trying to achieve – what does success look like?

1. Now, give yourself a score out of ten: how well are you doing in making progress towards that goal? Why do you give yourself that score? Write down your answer.
2. Question 2: Write down all the things you can think of that are working well and enabling progress towards your goal – it could be approaches, skills, behaviours, beliefs, people you were working with or places you are working.
3. Question 3: The opposite – what are all the things that are not working? The things that are getting in the way of progress? Again, these could be approaches, skills, behaviours, beliefs, people you were working with or places you are working.
4. Question 4 – Just out of interest, if you had a magic wish, what would you use it for? Something that you could make a big impact on?
5. Question 5: What do you need to continue doing or being, in order to make progress towards your goal – the practice and behaviour are working well and are still needed.
6. Question 6, What just needs to stop? Old, ineffective habits, things that are no longer working, things that you have enough of now, you don't need to do anymore.
7. Question 7: What needs to start happening, or be adapted to be done differently? What have you been putting off that just needs to start now?
8. Thinking about all the things you have been reflecting on. Who's help do you need? Who would be interested to know? Who can contribute? Who will you contact, when and how?

9. The final question: what is your biggest priority? If you were to go and take action right now – what would be the first thing you would do?

This exercise doesn't suit everyone – but it is important to systematically review. You may not have had a big revelation in your review, but what it does enable is your honesty with yourself: writing something down often forces us to acknowledge and confront things that have been going round in our heads for some time.

#### Slide 7

In the resources list, you will find a download of these questions. Use them for your horizon reviews, but you might also consider using them with collaborators and colleagues to assess progress on projects you are working in collaboration on – it's a great way to see if everyone is viewing progress in the same way. It's also a useful tool for doing quick progress reports for PhD students.