**Laboratory Leadership Webinar Series - Activity Workbook**

In order to complement some of the concepts presented during the webinar series, we have prepared some practical activities for you to use to better understand your own laboratory and management situation.

Session 1 – General Management

Learning Objectives

- Identify common management styles and reflect on how they can affect the daily operation of the laboratory

- Understand how tools can help optimize laboratory workflow and reflect on the improvements that can be made

**Activity 1: Identifying Management Styles**

**Instructions:** Review the table below presents an overview of four different management (or leadership) styles. Then, in the following table, read the scenarios and write down what style of management you think is being used.

|  |  |
| --- | --- |
| Management Style | Features |
| Autocratic | * Likes to retain control * Likes to tell subordinates what to do * No consultation * Subordinates expected to obey |
| Paternalistic | * As with autocratic, takes much responsibility for decision making but with caring attitude |
| Democratic | * Encourages participation * Shares information * Provides opportunities for the team to make decisions |
| Laissez-faire | * Little to no direction from manager to subordinate * Subordinates free to make decisions |

|  |  |
| --- | --- |
| Scenario | Management Style |
| 1. A microbiologist is leading a team of research scientists working on new ways to culture bacterial pathogens. Although the team discusses the merits of each idea and project, she retains the final decision-making authority. |  |
| 2. A new supervisor has just been put in charge of the specimen reception bench. He immediately starts by telling the technologists what changes need to be made. When some suggestions are made, he tells them he does not have time to consider them. |  |
| 3. A team of virologists has worked together for the last four years with very little change-over in personnel. They always vote whenever a decision has to be made on how to proceed with the project. |  |
| 4. The supervisor of a data entry team does not monitor the team’s activities. They are expected to arrange themselves to have the correct staffing, procedures, and expertise on each shift to ensure all testing requests are entered into their electronic system. |  |
| 5. There are seven people on a special project team and each individual is from a different department. Although a leader was elected, for a decision to pass it must have the approval of each individual. |  |
| 6. A project is running late. The laboratory manager calls a meeting of all scientists working on the project to apologize for the delays and tells them she will be implementing a new strategy that she created to help them to keep the project running on schedule. |  |
| 7. A manager is working on the budget for the installation of a new negative pressure PCR room. He is told to get the project running immediately. He calls his staff together and explains the project. He then tells them to get it up and going while he completes the budget. |  |
| 8. A newly hired supervisor is not allowed to make any decisions unless it is approved by the manager first. |  |

**Questions:**

1. In each of the above situations, do you think the management style used was helpful or not?
2. What management style would you have used to manage the situation?

**Activity 2: Reflect on a Management Experience**

**Instructions:** Can you think of a time when you have been in a situation similar to any of those presented in the activity above? Outline the situation below using a few sentences:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Questions:**

1. How did the management style used affect the situation?
2. Did it work, or could a different style have worked better?
3. How did other employees feel about the decisions made?
4. Did everyone learn from that style and what did they learn?

**Activity 3: Draw a RACI chart**

**Instructions:** Identify a process in your laboratory – for example ordering supplies or sample collection.  Write down all the tasks in that process in the table below using the column on the left. Then write the titles of the individuals involved along the top row.

Draw a RACI chart (add more rows and columns as needed) indicating those who are **R**esponsible, **A**ccountable, **C**onsulted, **I**nformed about the various parts of the process.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | | Staff 1 | Staff 2 | Staff 3 |
| **Task 1** |  | |  |  |
| **Task 2** |  | |  |  |
| **Task 3** |  | |  |  |

**Questions:**

1. Reflect on what the chart means. Are there too many Accountable or Responsible individuals?
2. Is there excess Consulting that is leading to delays?
3. Can you suggest any improvements to the chart?

Session 2 – Processes

Learning Objectives

- Understand how to build a process map and flowchart for laboratory processes and reflect on how this can be used to make improvements.

- identify laboratory errors and understand how to find their root cause

**Activity 1: Create a process map and flowchart**

Below is an example of a very simple flowchart for a sample collection process to help illustrate flowcharts. Diamonds are used for decisions, and rectangles are used for steps, with arrows between illustrating direction of process.

Collect and identify patient sample

Send to sample processing

Request new sample collection

**YES**

**NO**

Adequate sample ?

**Instructions:** Identify 2 of your actual laboratory processes to reflect on. One which seems to you to work well, and one which frequently has issues.  Then, on a spare piece of paper, draw a process map and a flowchart for each process similar to the one above.

Process 1.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Process 2.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Questions:**

1. Is there a difference in the complexity of the flow charts? (is the one with more errors more or less complex?)
2. Can you identify missing steps, or excessive steps in the flow charts?
3. Can you suggest and draw an improved workflow?

**Activity 2: Perform a root-cause-analysis**

**Instructions:** Write down a list of the three most common errors, or potential errors, in your lab. For each error, try to establish a ‘root cause’ by performing a 5-why\* analysis.

*\*Note that the number 5 is a guide to help you to think about the deeper underlying problems of the process, however you may ask ‘why’ as many times as needed - which may be more or less than 5 whys.*

**Errors:**

1.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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3.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5-Why Analysis**

**Error 1**

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Error 2**

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Error 3**

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why? Because... \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Questions:**

1. What remedial actions could you take to address the immediate consequences of the errors?

2. What corrective actions could you put in place to address the root cause of the errors and prevent recurrence?

**Error 1**

*Remedial*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Corrective\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Error 2**

*Remedial*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Corrective\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Error 3**

*Remedial*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Corrective\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Session 3 - People

Learning Objectives

* Identify Your Personality Type
* Describe Your Motivation Motivation Style

**Activity 1: Basic Personality Type Indicator Test**

The way in which different people see and understand the world can be very different, depending on their personality type. One way to identify, and better understand this is by taking a personality questionnaire which will establish your personality “indicators”. One of the most famous indicators are the Myers-Brigg Personality Type Indicator (MBTI).

**Instructions:** In this activity we ask you to identify your four MBTI personality indicators. Below we provide a simplified version of the questionnaire which you can use. Alternatively, there are many different (free) online versions of the questionnaire with different question formats which you may find interesting.

One online version is <https://www.16personalities.com/> which is available in 37 languages. Please note, the mention of this specific version and its translations does not imply that they are endorsed or recommended by WHO in preference to others of a similar nature that are not mentioned.

**Questions:**

1. Which way is your energy most naturally oriented?

|  |  |
| --- | --- |
| **Extroverted Characteristic (E)**   * Act first, think/reflect later * Feel deprived when cut off from interaction with the outside world * Usually open to and motivated by outside world of people and things * Enjoy wide variety and change in people relationships | **Introverted Characteristics (I)**   * Think/reflect first, then act * Regularly require an amount of “private time” to recharge batteries * Motivated internally, mind is sometimes so active it is “closed” to outside world * Prefer one-to-one communication and relationships |
| **Choose which best fits:** Extraversion (E) or Intraversion (I) | |

2. Which way of perceiving or understanding events is most “automatic”

|  |  |
| --- | --- |
| **Sensing Characteristics (S)**   * Mentally lives in the present * Being practical and using common sense solutions is automatic or instinctual * Memory recall is rich in detail of facts and past events * Prefers to improvise from past experiences * Like clear and concrete information; dislike guessing when facts are “fuzzy” | **Intuitive Characteristics (N)**   * Mentally live in the future * Using imagination and creating/inventing new possibilities is automatic or instinctual * Memory recall emphasizes patterns, contexts and connections * Prefers to improvise from theoretical understanding * Comfortable with ambiguous, fuzzy data and with guessing its meaning |
| **Choose which best fits:** Sensing (S) or I**N**tuition (N) | |

3. Which way of making choice and forming judgements is most natural?

|  |  |
| --- | --- |
| **Thinking Characteristics (T)**   * Instinctively search for facts and logic in decision making. * Focus on tasks and work to be accomplished * Easily able to provide an objective and critical analysis * Accept conflict as a natural, normal part of relationships with people. | **Feeling Characteristics (F)**   * Instinctively employ personal feelings and impact on people in decision situations. * Being sensitive to peoples’ needs and reactions is a prime consideration. * Naturally seek consensus and popular opinions. * Unsettled by conflict; have almost a toxic reaction to disharmony. |
| **Choose which best fits:** Thinking (T) or Feeling (F) | |

4. What is your approach to working or taking action in the outside world

|  |  |
| --- | --- |
| **Judging Characteristics (J)**   * Plan many of the details in advance before moving into action. * Focus on task-related action: complete meaningful segments before moving on. * Work best and avoid stress when keeping ahead of deadlines. * Naturally uses targets, dates, standard routines to manage life. | **Perceiving Characteristics (P)**   * Comfortable moving into action without a plan, and plan on-the-go. * Like to multitask, have variety, mix work and play. * Naturally tolerant of time pressure; works best close to the deadline. * Instinctively avoid commitments which interfere with flexibility, freedom and variety. |
| **Choose which best fits:** Judging (J) or Perceiving (P) | |

# **Write your 4 letter personality type acronym here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Activity 2: Motivation Survey**

**Instructions:** Answer the questions below about your way of working to identify the motivation style you most identify with. For each item, check the statement that most closely describes your preference, most of the time. There are no right or wrong answers.

1. \_\_ a.  When doing a job, I seek feedback.

\_\_ b.  I prefer to work alone and am eager to be my own boss.

\_\_ c.  I seem to be uncomfortable when forced to work alone.

2. \_\_ a.  I go out of my way to make friends with new people.

\_\_ b.  I enjoy a good argument.

\_\_ c.  After starting a task, I am not comfortable until it is completed.

3. \_\_ a.  Status symbols are important to me.

\_\_ b.  I am always getting involved in group projects.

\_\_ c.  I work better when there is some challenge involved.

4. \_\_ a.  I work best when there is some challenge involved.

\_\_ b.  I would rather give orders than take them.

\_\_ c.  I am sensitive to others – especially when they are mad.

5. \_\_ a.  I am eager to be my own boss.

\_\_ b.  I accept responsibility eagerly.

\_\_ c.  I try to get personally involved with all my superiors.

6. \_\_ a.  I am uncomfortable when forced to work alone.

\_\_ b.  I prefer being my own boss, even when others feel a joint effort is required.

\_\_ c.  When given responsibility, I set measurable standards of high performance.

7. \_\_ a.  I am very concerned about my reputation or position.

\_\_ b.  I have a desire to out-perform others.

\_\_ c.  I am concerned about being liked and accepted.

8. \_\_ a.  I enjoy and seek warm, friendly relationships.

\_\_ b.  I attempt complete involvement in a project.

\_\_ c.  I want my ideas to be predominate.

9. \_\_ a.  I desire unique accomplishments.

\_\_ b.  It concerns me when I am being separated from others.

\_\_ c.  I have a need and desire to influence others.

10. \_\_ a.  I think about consoling and helping other people.

\_\_ b.  I am verbally fluent.

\_\_ c.  I am restless and innovative.

11. \_\_ a.  I set goals and think about how to attain them.

\_\_ b.  I think about ways to change people.

\_\_ c.  I think a lot about my feelings and the feelings of others.

***Motivation Survey – scoring Instructions***

Use the scoring guide below to determine your primary motivation type, by tallying the number of letters you circled in each column and enter the number in the row labeled “TOTAL”. The column with the highest score indicates your primary motivation type.

|  |  |  |  |
| --- | --- | --- | --- |
| **Item #** | **Achievement** | **Affiliation** | **Influence** |
| 1 | A | C | B |
| 2 | C | A | B |
| 3 | C | B | A |
| 4 | A | C | B |
| 5 | B | C | A |
| 6 | C | A | B |
| 7 | B | C | A |
| 8 | B | A | C |
| 9 | A | B | C |
| 10 | C | A | B |
| 11 | A | C | B |
| TOTAL |  |  |  |

**I am primarily motivated by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**