Team ITS Playbook

The guide to being a great team member
at Northeastern University's
Information Technology Services

IT Services at Northeastern University is about people first, even before technology. We deliver services and solve problems for people, and we do so by understanding and collaborating with people. To be the most successful at this, we must have a customer mindset, defining "customer" in the broadest way possible. On Team ITS, we're all customers of each other.

During the 2019-2020 academic year ITS partnered with BTS, a consulting agency specializing in the people side of strategy, to develop the Team ITS Playbook. The profiles and playbooks found in this publication were developed through interviews and focus groups across all levels of Team ITS and are endorsed by ITS leadership. We created these tools to align the entire organization around what great performance looks like in supporting the vision of the global digital university and positioning ITS and Northeastern for success.

Our mindsets drive our actions and behaviors, and are the difference between being "above the line" or "below the line," which are concepts you'll find throughout the Playbook. We want to spend as much time as possible above the line, being mindful, open, curious, and always looking to be better. When we find ourselves closed off, defensive, and making assumptions, we're below the line. Fortunately, our mindsets are within our control. Once we recognize what being below the line feels and looks like, we can take steps to shift our mindset and get back above it.

This book is a reference, a tool, and a compass providing support and direction. A team member new to the organization may be looking for guidance on expectations for themselves or others. A veteran leader may need a little help working through a particular problem or situation. Or maybe somebody is in a funk or just feeling "below the line" and needs help getting back above it. Use the Playbook in a way that best helps you be great and succeed in driving the university's ambitious mission forward.

Together, we make a great team.

ITS Core Values

Our values are our cultural cornerstones, helping guide individual and organizational actions, no matter how our business strategy and roadmap may change.

EMPATHY

Delivering an enjoyable, seamless experience that meets customers' needs is our mission.

CONTRIBUTION

Making a difference in the world and in our communities is not something we take lightly.

EXCELLENCE

Collaborating on and tackling global and digital challenges together—efficiently and effectively—we challenge the status quo.

Using This Playbook

1) **Expectation setting** – The profile aids in establishing expectations for how we should operate, interact with each other, and make decisions.

2) **In-the-moment feedback** – Once expectations are set, leverage the profile and the playbook to give in-the-moment feedback to both reinforce positive behavior and provide one-on-one constructive feedback to help team members be more effective.

3) **Coaching** – A useful tool for coaching individuals and teams on important, upcoming challenges, the playbook identifies both what identifies what Great performance looks like in those challenges and the common pitfalls to avoid.

4) **Development planning** – Use the profile and playbook to drive development as individuals and leaders alike can identify specific capability or moment behaviors that are opportunities for improvement based on feedback or individuals' self-assessment of areas for growth. [see ITS Organizational Goals below for more]

ITS Organizational Goals

As part of Northeastern University's Performance and Development Cycle, IT leadership expects that all full-time ITS staff set and track the same organizational goals. These goals draw directly from this playbook and the other work to develop ITS' mission, core values, and culture.

The organizational goals may change from year to year, evolving with the IT organization and Northeastern University.
For the current organizational goals, check the back of this playbook or visit **its.northeastern.edu/goals**.

WHAT GREAT LOOKS LIKE

The Team ITS Playbook contains two sets of tools organized by ITS staff roles.

Use the set of tools for the role best suited to you, knowing that **roles aren't static and may change over time**, through new opportunities, or even on a project-by-project basis.

Tools

GREAT PROFILES
define key mindsets, capabilities, and behaviors needed to excel in roles within Northeastern's Team ITS.

GREAT PLAYBOOK MOMENTS
Identify pivotal, on-the-job moments we face where exceptional performance is critical to the success of ITS and Northeastern.

The Individual Contributor

PROFILE CAPABILITIES

Profile capabilities define the expectations for greatness.

They provide a common language to set expectations, give feedback, and continue to develop ourselves and our teams.

PARTNERING FOR SUCCESS

ADVOCATING FOR CHANGE

GETTING BETTER EVERY DAY

GOING THE EXTRA MILE

COMMUNICATING WITH IMPACT

PROVIDING OPERATIONAL EXCELLENCE

SERVING AND EMPOWERING THE CUSTOMER

MANAGING UP

GREAT PROFILE

PARTNERING FOR SUCCESS

- Collaborate with colleagues within ITS to create a unified approach to work and to learn from one another
- Ask questions to challenge colleagues' thinking on whether solutions and processes that ITS is developing are truly in service of customers.
- Uncover, capture, and share learnings on customer stories, goals, and businesses.
- Ask customers open-ended and probing questions to uncover the "why" behind every request, the problem(s) they're encountering, and what they're trying to solve.
- Collaborate with customers–instead of simply taking their orders–to give them a role in crafting and developing solutions.
- Listen to the perspectives and input of all customers, not just the loudest ones, and incorporate their ideas in the solution.
- Discuss incidents, pain points, and change requests with customers proactively and on a regular basis.
- Make recommendations to customers that reflect a holistic understanding of their needs and interests.

GREAT PROFILE

ADVOCATING FOR CHANGE

- Ask questions to understand how a change aligns with strategic priorities, and follow up with their manager for additional clarification as needed.
- Collaborate with the appropriate stakeholders to craft implementation plans, and discuss how strategic moves outside of ITS may impact change implementation.
- Raise potential implications (e.g., platform complexity, support requirements, user impact) when discussing change rollout.
- Tailor interactions with customers based on classifications around who will change, who will be on the fence, and who will resist the change.
- Devote time to learning about a change, its implications, and the reason for it before communicating it to others.
- Champion upcoming changes to others in everyday conversation and encourage those who have brought into the change to do the same.
- Explain to affected customers the value proposition of upcoming changes, how they'll improve business processes, and their alignment to Northeastern's global digital university mission before rollout.
- Solicit customer feedback on any upcoming change and act on it.

GETTING BETTER EVERY DAY

GREAT PROFILE

- Make regular, incremental enhancements to existing processes and tools to improve the experience for customers.
- Empower one another to analyze data and to make course corrections in real time.
- Incorporate customer feedback from conversations, tickets, dashboards, etc. when improving existing processes and solutions or creating new ones.
- Reflect on and share learnings and problem resolutions as you go to save time, prevent recurrences, improve existing processes, and transfer knowledge throughout ITS
- Acknowledge when you need help and ask for it.
- Stay abreast of changes and trends happening outside of ITS (e.g., industry, university) and look for opportunities to incorporate them.
- Ask for opportunities to get involved with challenging projects, take formal courses, and attend professional conferences to keep skills up-to-date.
- Deliver specific, actionable, in-the-moment feedback to help fellow team members grow personally and to advance ITS.

GREAT PROFILE

GOING THE EXTRA MILE

- Own tasks, and establish and commit to deadlines to get them done
- Express a willingness to work diligently, urgently, and committedly to get things done.
- Proactively ask leaders if there are projects you can be involved in to help colleagues, to drive ITS forward, and to create customer value.
- Take the initiative to research and develop solutions to resolve outstanding issues.
- Offer to assist ITS colleagues with work and take on responsibilities that are not your own.
- Respond to urgent, stressful situations with composure and professionalism.
- Self-assess when you're falling "below the line" and course-correct to get back "above the line."
- Persevere and keep a positive attitude when faced with personal or organizational setbacks, fires, and problems.

GREAT PROFILE

COMMUNICATING WITH IMPACT

- Communicate directly, transparently, and at the right time with colleagues, managers, and customers to build trust.
- Break complex, technical information down into digestible, simple language that doesn't assume the audiences have technical knowledge.
- Never say in 10 words what can be said in five.
- Have face-to-face conversations when possible and practical and, if not, share video when meeting virtually.
- Use tools such as Microsoft Teams to stay connected with projects and customer issues, and to share real-time documentation.
- Start any message with the most important information at the forefront.
- Tailor messages, the degree of detail provided, and the medium used to the audience before delivering any communication.
- Leverage the support of subject matter experts, as needed, when communicating technical needs and requirements to customers.
- Actively and patiently listen to what others are saying before offering perspective or input.

GREAT PROFILE

PROVIDING OPERATIONAL EXCELLENCE

- Prioritize tasks according to criticality, impact, and the timeline.
- Quickly and calmly adapt priorities when last-minute, critical requests come in.
- Conduct a daily review of tasks and priorities to track ongoing progress and to drive performance.
- Inform affected stakeholders when projects and deliverables are going to be impacted by shifted priorities after getting appropriate direction from manager.
- Appropriately balance ramping up on problems and tasks quickly with spending the time to understand the details behind them.
- Reflect on lessons learned after major problems are solved to discuss how recurrences can be prevented in the future.
- Know the internal and external channels to find solutions to problems and to complete work efficiently.
- Create a checklist to proactively address common questions and issues that arise during critical times.

GREAT PROFILE

SERVING AND EMPOWERING THE CUSTOMER

- Model the mindset that "we are all customers of one another."
- Treat every customer with kindness, warmth, and understanding.
- Talk with customers about their process and what they're experiencing before trying to solve their problem.
- Empathize with customers on any technical issues they're experiencing, understanding the practical impact to them.
- Ask probing questions to quickly identify and address the root cause of problems.
- Update customers on what you know, progress, and next steps for open issues without inundating customers with process-related information.
- Answer questions without making the customer feel foolish or judged for having them.
- Conduct usability testing on solutions and processes to understand the customer perspective – what they see and what they experience.
- Look for opportunities to automate and create shortcuts for customers, creating a process by which the customers can either perform the task themselves or establish a process to do it for them.

GREAT PROFILE

MANAGING UP

- Give honest and constructive feedback to leaders on your own experience within ITS.
- Share when things are (and when they're not) going well with tasks and projects.
- Raise project concerns and potential risks with the appropriate leader and also, if needed, with project sponsors.
- Ask to be involved in projects and opportunities that are of interest and that will drive professional development.
- Propose suggestions, ideas, and opportunities on how to improve the ITS service experience.
- Read contextual clues to understand when feedback isn't well received, indicating it's time to move on.
- Relay feedback and data on opportunities for improvement from customers to the appropriate leader.

PLAYBOOK MOMENTS

The Individual Contributor

As each individual contributor grows in their roles, there are pivotal moments they may face.

This playbook explains in detail how to handle these moments as a great individual contributor in ITS. Each moment requires multiple capabilities to be successful.

The icons represent the capabilities most critical for that moment, though many might be needed.

1. **When balancing the demand of new projects with existing priorities**
2. **When a customer comes to you with a problem that you don't know how to solve**
3. **When you need to learn a new skill, but you aren't sure where to start**
4. **When you don't agree with a proposed solution/suggestion**
5. **When communicating a change that may impact customers' day-to-day**
6. **When working with a customer who doesn't trust ITS**
7. **When you must give up something you've been working on and shift priorities quickly**
8. **When you must provide difficult feedback to a colleague**
9. **When a customer comes to you with a request directly instead of following procedures**
10. **When you have a new idea**
11. **When you must put out a fire**
12. **When you see a colleague struggling**
13. **When you receive feedback from a colleague**

When balancing the demand of new projects with existing priorities

Great

MINDSET: *I seek to understand how what I'm working on supports the mission of Northeastern.*

- Prioritize existing tasks, focusing efforts on what's needed now.
- Create a methodology for managing workloads that makes time for both daily tasks and customer requests.
- Shift attention and efforts from new projects to daily tasks with ease.
- Add to existing timelines, when necessary, to account for changing demands.
- Keep stakeholders informed of revised timelines and potential delays in response to changes.
- Assist colleagues in thinking through their project issues.
- Ask manager for help when you can't balance demands or when struggling to determine what to prioritize.
- Escalate issues to manager when there are problems you can't solve.

Not-Yet-Great

MINDSET: *The work on my plate is outside of my control, and I just need to get it done.*

- Ask manager for a list of tasks to focus on instead of personally establishing priorities.
- Disproportionately divide time between new projects and existing tasks.
- Refrain from asking anyone for help, trying instead to do it all on your own.
- Become overwhelmed when asked or expected to shift attention quickly.
- Say yes to all new requests without considering current workload and commitments.

Capabilities Needed in This Moment

ADVOCATING FOR CHANGE

GETTING BETTER EVERY DAY

MANAGING UP

When a customer comes to you with a problem that you don't know how to solve

Great

MINDSET: *Solving this problem will not only delight the customer but also help me learn something new.*

- Apologize genuinely for the inconvenience, empathizing with the customer on the impact of the issue.
- Listen to the customer's recounting of the problem before offering solutions.
- Ask questions to collect pertinent data–such as when the problem happened, how it happened, and what the result was–to gain a fuller understanding of the problem.
- Set expectations on when the customer can expect to hear from you with next steps or a resolution to the problem.
- Review existing documentation for potential solutions to the problem before troubleshooting.
- Ask other experts either to guide you in solving the problem or, if a quick resolution is needed, to solve the problem for you.
- Keep the customer apprised of what's going on, what you know, and when (i.e., how soon) a resolution to the problem is expected.
- Create and share documentation to transfer knowledge of the problem's solution to others.
- Commit to follow up with the customer by a specific, agreed-upon deadline.

Not-Yet-Great

MINDSET: *I don't have the knowledge and skills needed to solve the problem.*

- Neglect to articulate an understanding of why the problem is affecting the customer.
- Propose a timeline for the problem's resolution without knowing if that timeline is realistic.
- Spend too much time trying to solve the problem personally instead of leveraging the documentation and experts available.
- Pass the problem off to another team member without trying to learn how to solve the problem.
- Provide sporadic updates to the customer on the problem's resolution.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

GETTING BETTER EVERY DAY

COMMUNICATING WITH IMPACT

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT 3

Individual Contributor Behaviors

When you need to learn a new skill, but you aren't sure where to start

Great

MINDSET: *I have untapped potential and want to challenge myself to continually get better.*

- Use existing tools (e.g., LinkedIn Learning) to engage in individualized learning.
- Share personal interests and professional development goals with manager.
- Talk about your development in meetings with manager to make it a top-of-mind consideration for both of you.
- Ask manager for feedback on how to prioritize development efforts.
- Solicit input and reviews from ITS colleagues on formal courses and other training opportunities they've taken and on conferences they've attended.
- Tell manager when there are stretch opportunities you'd like to pursue or challenging projects in which you'd like to be involved.
- Monitor and solicit feedback on your progress in development efforts.

Not-Yet-Great

MINDSET: *The experience and knowledge I have are enough to perform effectively.*

- Rely on manager to define your development needs.
- Seek or attend training opportunities only at the behest of others.
- Deprioritize seeking opportunities for professional growth.
- Focus wholly on the daily tasks at hand to the detriment of learning and development.
- Try to develop too many skills simultaneously.

Capabilities Needed in This Moment

GETTING BETTER EVERY DAY

MANAGING UP

Individual Contributor Behaviors

When you don't agree with a proposed solution/suggestion

Great

MINDSET: *Sharing my perspective better informs the team and improves upon solutions.*

- Gather the appropriate stakeholders to discuss the proposal.
- Conduct any necessary research to help bolster your case for why you disagree.
- Ask publicly of other stakeholders, "How does this align to Northeastern's strategy?"
- Synthesize and share the feedback heard that relates to the proposal at hand.
- Listen to other stakeholders' perspectives on the issue before sharing yours.
- Respond confidently and constructively when you disagree with the proposal described.
- Ground concerns in the available data.
- Align with stakeholders on next steps before moving on.
- Escalate the matter to manager or other ITS leaders when needed, if the concern is serious.
- Accept the decision, even if it goes against your recommendation.

Not-Yet-Great

MINDSET: *If others aren't voicing concerns, it must be fine.*

- Say nothing, trusting others to speak up instead.
- Defer to other stakeholders on the decision without sharing your input.
- Neglect to mention the available data when making case for why you disagree.
- Push back on the solutions/suggestion in a negative, combative manner instead of fostering productive debate.
- Ignore the rationale behind opinions that differ from your own.
- Continue to engage in negativity when discussing the proposal.

Capabilities Needed in This Moment

PLAYBOOK MOMENT **5**

Individual Contributor Behaviors

When communicating a change that may impact customers' day-to-day

Great

MINDSET: *Change is an opportunity to make the customers' work easier and the university better.*

- Meet with stakeholders and ITS colleagues to gain a thorough understanding of the change, the reason for it, and its implications for affected customers.
- Reflect on what's important to customers before communicating with them.
- Proactively prepare answers to the anticipated questions from customers.
- Reach out to customers early in the change implementation process to set both the customer and ITS up for success.
- Tailor the message and the level of detail provided to each customer and their needs.
- Share the added value/benefit the customer will experience as a result of the new solution.
- Respond to customer concerns, complaints, and frustration positively and look for ways to assuage them.
- Leverage change champions, valued stakeholders, and manager for support in generating customer buy-in.

Not-Yet-Great

MINDSET: *Change is a nuisance to me and to the customer.*

- Relay the change to customers without communicating its utility and value.
- Deliver the same message with the same communication style to every affected customer.
- Spend more time talking about how the change impacts ITS than talking about its impact on customers.
- Commiserate with customers over the change instead of working to achieve their buy-in.

Capabilities Needed in This Moment

ADVOCATING FOR CHANGE

COMMUNICATING WITH IMPACT

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT 6

Individual Contributor Behaviors

When working with a customer who doesn't trust ITS

Great

MINDSET: *Customers and I work for the same team, and I will do whatever I can to help them be successful.*

- Acknowledge and genuinely apologize for past experiences in which ITS fell below the customer's expectations.
- Advance the conversation from what the customer experienced in the past to how ITS can help today.
- Ask questions about the customer's needs, goals, and pain points.
- Inform the customer of services that ITS can provide not only to meet their needs but also to fully support them.
- Strive to deliver commitments to the customer on time and always let the customer know when you can't.
- Check in with the customer regularly to get feedback on how ITS solutions are working and on whether there are opportunities for improvement.

Not-Yet-Great

MINDSET: *The needs of customers and ITS are often in conflict.*

- Make excuses for ITS regarding the customer's complaints about past experiences and, in doing so, invalidate them.
- Jump in immediately to trying to work with the customer without first asking questions to determine the customer's needs and pain points.
- Provide recommendations without considering what's needed from ITS to deliver on them.
- Refer the customer to the Service Desk for future questions about the solution instead of following up personally.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT **7**

Individual Contributor Behaviors

When you must give up something you've been working on and shift priorities quickly

Great

MINDSET: *A shift in priorities gives me the opportunity to make new, meaningful contributions.*

- Clarify with manager the reasons for the shift, and what the situation and its impact are.
- Remind yourself that you're being asked to shift in service of ITS and Northeastern.
- Evaluate the priority of the tasks and adjust accordingly.
- Inform colleagues and stakeholders of delays to existing work as a result of the shift.
- Ask manager for help if struggling to adjust to the new priority or if experiencing pushback from affected stakeholders or customers.
- Diligently and urgently work through the new priority.
- Return to the work in which you were previously engaged when you're able, if and when it regains priority status.

Not-Yet-Great

MINDSET: *Shifting priorities to something new diminishes the work I'm giving up.*

- Continue working on the existing work until it's completed before shifting priorities.
- Attempt to multitask, working on both the existing work and the new priority, to the detriment of the work quality of both.
- Become visibly frustrated and stressed when faced with quickly changing priorities.
- Take the request to shift personally because of the amount of time you invested in the previous work.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

GOING THE EXTRA MILE

PROVIDING OPERATIONAL EXCELLENCE

PLAYBOOK MOMENT 8

Individual Contributor Behaviors

When you must provide difficult feedback to a colleague

Great

MINDSET: *I can offer honest feedback in a constructive way that others can hear.*

- Reflect on intentions and what you want to share with the colleague before beginning the conversation.
- Deliver feedback that's clear, detailed, and based on observable behaviors.
- Share the feedback in a timely manner and in a private space.
- Convey positive intent when delivering the feedback.
- Emphasize to the colleague that no one is perfect and the feedback is in service of the colleague's development.
- Relay what the colleague did well in addition to what could have been done differently.
- Offer to follow up or to help the colleague if there's anything you can do to support future growth.

Not-Yet-Great

MINDSET: *I can't offer honest feedback while preserving relationships.*

- Refrain from sharing feedback with the colleague.
- Relay the feedback confrontationally instead of conversationally.
- Share unspecific, vague feedback that isn't actionable.
- Allow your own judgment of the colleague to impact the feedback you deliver.
- Frame the conversation and feedback negatively instead of sharing anything positive.

Capabilities Needed in This Moment

GETTING BETTER EVERY DAY

COMMUNICATING WITH IMPACT

MANAGING UP

PLAYBOOK MOMENT **9**

Individual Contributor Behaviors

When a customer comes to you with a request directly instead of following procedures

Great

MINDSET: *Solving customer problems and empowering them to do great work are priorities.*

- Acknowledge the customer's request and, if it's a problem, its impact to them.
- Ask if the customer has logged a ticket for the request.
- Collect details from the customer on the need behind the request.
- Provide a clear, yet detailed, explanation of the solution (if it's a simple, often-repeated request) so that the customer can fix the issue on their own in the future.
- Answer any questions the customer has before explaining what to do for future requests and, if needed, walk the customer through it.
- Explain at a high level the value of self service in logging a ticket for future requests and how it will expedite resolutions for the customer.

Not-Yet-Great

MINDSET: *I need to prioritize educating customers on how to follow procedures over solving their problems.*

- Refer the customer to the Service Desk without addressing the request.
- Perform the customer's request without mentioning logging tickets moving forward.
- Delay addressing the request until there is more time available.
- Overwhelm the customer with details on how to submit a ticket, how the problem is tracked, and the steps ITS follows behind the scenes.

Capabilities Needed in This Moment

COMMUNICATING WITH IMPACT

PROVIDING OPERATIONAL EXCELLENCE

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT **10**

Individual Contributor Behaviors

When you have a new idea

Great

MINDSET: *I can offer new ideas to make ITS and Northeastern more successful.*

- Identify the benefits and any implications of the idea before sharing it with others.
- Clearly define what the idea would require to be successfully implemented and maintained.
- Share the idea with manager once it has been defined.
- Present the case for the idea using data, both quantitative and qualitative.
- Articulate the idea's anticipated benefits to customers, ITS, and Northeastern.
- Describe the idea in compelling and impactful language to energize others around it.
- Ask for feedback on what you can do to improve the idea and turn it into a reality.
- Engage in constructive conversations when faced with alternative perspectives.
- Consider the idea separately from its outcome and adoption.
- Accept reasons why the idea may not be used, without getting discouraged.

Not-Yet-Great

MINDSET: *The best ideas for ITS come from leadership.*

- Keep the idea to yourself, assuming it's an idea ITS has already considered.
- Communicate the idea without sharing the business case for it.
- Persist in pushing the idea, even when it's been resoundingly turned down.
- Become defensive when manager or others question the idea or offer different perspectives.

Capabilities Needed in This Moment

ADVOCATING FOR CHANGE

GETTING BETTER EVERY DAY

MANAGING UP

PLAYBOOK MOMENT **11**

Individual Contributor Behaviors

When you must put out a fire

Great

MINDSET: *I can put out this fire and minimize its impact to customers, team members, and ITS.*

- Acknowledge there's a fire that demands your attention.
- Quickly shift other tasks and priorities you were working on.
- Bring the right people together, both within and outside of ITS, to discuss the impact of the issue, potential solutions, and next steps.
- Communicate timelines, updates, and statuses to affected customers without overwhelming them with process-related details.
- Conduct research into the root cause of the issue and potential workarounds that can be leveraged in the interim.
- Relay temporary patches and workarounds to allow customers to continue working in the interim.
- Work until the root cause of the fire is identified and solved, instead of simply moving on once it has been put out.
- Follow up with customers to ensure they're satisfied with the resolution.
- Make process, procedural, or solution updates as needed to prevent reoccurrences.
- Update SBAR, or post-incident report, as needed.

Not-Yet-Great

MINDSET: *This fire will put unavoidable stress and pressure on customers and ITS.*

- Use an "all-hands-on-deck" approach to fighting the fire, allowing the stress to pervade all of ITS.
- Patch the problem without ever coming back to truly fix the issue and prevent fires from reoccurring.
- Prioritize implementing the technical fix to the fire over communicating with affected stakeholders and customers.
- Focus all efforts on fighting the fire, not looking into temporary workarounds that affected customers can use.
- Get overwhelmed by the stress of the situation and fall "below the line."

Capabilities Needed in This Moment

GOING THE EXTRA MILE

PROVIDING OPERATIONAL EXCELLENCE

SERVING AND EMPOWERING THE CUSTOMER

Individual Contributor Behaviors

When you see a colleague struggling

Great

MINDSET: *I care about team members.*

- Proactively reach out to get a sense of how the colleague is doing and whether support is needed.
- Reiterate that you're all part of one team, working in service of the same goals and learning from one another.
- Emphasize confidence in the colleague's ability to successfully complete whatever they're struggling with.
- Treat the colleague kindly and empathetically without making them feel judged.
- Ask what you can do to help the colleague.
- Teach the colleague through the situation instead of simply telling them what to do.
- Provide any assistance the colleague requests simply because it's the right thing to do, not to receive any praise or credit.
- Follow up to see how the colleague is doing and whether additional support is needed.

Not-Yet-Great

MINDSET: *I care about team members completing work.*

- Trust the colleague to work through the struggles without offering to help.
- Convey to the colleague that you're too busy when the colleague asks for help.
- Express that the colleague should have known how to work through the struggles, after providing guidance.
- Publicly share with others that the colleague was struggling and that you stepped in.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

GETTING BETTER EVERY DAY

GOING THE EXTRA MILE

PLAYBOOK MOMENT **13**

Individual Contributor Behaviors

When you receive feedback from a colleague

Great

MINDSET: *Receiving constructive feedback gives me the opportunity to reflect on myself, my interests, and my growth.*

- Thank the colleague sincerely for giving the feedback.
- Assume that the colleague who shared the feedback had a positive intent in doing so.
- Pause before responding to the feedback to enter a positive frame of mind.
- Verbalize your understanding of the feedback to the colleague who shared it.
- Ask clarifying questions, as needed, to the colleague who shared the feedback.
- Seek recommendations from the colleague who shared the feedback on opportunities to improve upon the feedback area.
- Spend time reflecting on your actions and behaviors that led to the feedback.
- View the feedback as an opportunity for personal growth and development.
- Solicit feedback from additional colleagues and from manager on the feedback area, as appropriate.
- Relay the feedback received to manager when appropriate.
- Own the behavioral change needed to correct and address the feedback area.
- Check in with the colleague who shared the feedback to discuss ways you've incorporated the feedback.

Not-Yet-Great

MINDSET: *Receiving constructive feedback means I'm not good enough.*

- Listen to the feedback without engaging the colleague in questions and conversation around it.
- Become visibly upset, taking the feedback negatively and personally.
- Respond defensively to the colleague who shared the feedback.
- Attempt to reframe the feedback immediately without reflecting on what you heard.
- Make excuses to invalidate the feedback.
- Minimize or deflect the feedback, even if it's positive.
- Respond confrontationally to the feedback.
- Overcorrect in the feedback area.
- Rely on manager for guidance on what to do to address the feedback area.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

GETTING BETTER EVERY DAY

HOW GREAT LEADS

PROFILE CAPABILITIES

Profile capabilities define the expectations for greatness.

They provide a common language to set expectations, give feedback, and continue to develop ourselves and our teams.

PARTNERING FOR SUCCESS

GETTING BETTER EVERY DAY

SERVING AND EMPOWERING THE CUSTOMER

CREATING CLARITY

LEADING THROUGH CHANGE

CREATING TEAM ALIGNMENT

MANAGING MODERN WORKPLACES

EMBRACING THE VISION

GREAT PROFILE

PARTNERING FOR SUCCESS

- Proactively introduce yourself to new managers and staff to welcome them to ITS and Northeastern.
- Network with customers, service owners, and other leaders to build rapport, to gain a deeper understanding of how they can work better together, and to facilitate ongoing strategic discussions.
- Solicit ideas from teams and leaders beyond own area to nurture an enterprise mindset.
- Take into consideration the impact your decisions have on others.
- Consult with customers to uncover strategic needs and desired future state that underpin the customers' requests and concerns.
- Offer different possibilities and perspectives when working with customers to provide value and to influence decisions.
- Share credit with other teams that support your group's success.
- Convey to team members that you're the team's partner and that the team can lean on you for support and guidance.
- Express positivity and support to customers when an outage occurs, even if responsibility for the outage falls to the customer.
- Strive to be an excellence representative of ITS in all interactions, understanding that you may be the face of ITS to others in the Northeastern community.

GREAT PROFILE

GETTING BETTER EVERY DAY

- Encourage innovative ideas that challenge the notion of "doing things the way they have always been done."
- Challenge the team to think of the next generation of solutions as they work on the current solution.
- Prioritize scalability in ITS solutions, considering what can be leveraged for multiple business uses to create repeatable processes.
- Look for opportunities to streamline operations and keep process improvements in the forefront.
- Ask the team to create documentation so they don't reinvent the wheel.
- Share real-time feedback with the team.
- Cultivate a sense of urgency in their communications.
- Offer training opportunities that are aligned with each individual team member's professional interests and development needs.
- Urge team members to shift their thinking from "we know how to fix things" to "let's understand why this didn't work."
- Perform root cause analysis to understand the "why" behind the "what" where there's an issue to identify, and to resolve the underlying concern.
- Proactively discuss your own professional development with your manager.

GREAT PROFILE

SERVING AND EMPOWERING THE CUSTOMER

- Push yourself and the team to deliver a best-in-class customer experience.
- Create self-service functionality that empowers customers to resolve issues.
- Demonstrate the solutions provided to customers to ensure that customers recognize the full breadth of the solution's capabilities.
- Implement systems that are self-service whenever possible.
- Proactively articulate ITS services during conversations with customers to communicate ITS's value proposition.
- Balance being accommodating with tactfully pushing back to ensure that solutions proposed by customers are in line with business practices.
- Tailor communications to meet each customer's level of technical expertise.
- Clearly communicate how upcoming changes will impact customers and their workflows to ensure that customers can continue to work without disruption.

GREAT PROFILE

CREATING CLARITY

- Drive forward long-term strategy while simultaneously executing today's priorities
- Make decisions with confidence and sound judgment, even in cases in which full data isn't available, to move IT forward.
- Articulate Northeastern's priorities to the team clearly and regularly.
- Set priorities for yourself and the team that consider timelines, existing demands and requests, and customer impact.
- Communicate work schedules, meeting notes, and updates to the team to ensure they know what to be working on and when.
- Shift personal and team priorities on-the-fly when necessitated by fires or customer demands.
- Recognize when to push back on customers' out-of-scope request to gatekeep new projects effectively for the team.
- Escalate issues to manager or colleague when encountering a problem you can't resolve.

GREAT PROFILE

LEADING THROUGH CHANGE

- Explain where ITS used to be, where ITS is today, and where ITS is going to energize the team around ITS's progress.
- Highlight how a change will impact the team's workflows and allow for discussion to ensure that the team feels comfortable and involved with the change.
- Articulate the "why" behind a change and the benefits it brings to the team and customers to assuage concerns.
- Relay pertinent information about change transparently so the team is informed.
- "Pre-game" with the team to align internally on customer communication and implementation plans.
- Collaborate with the ITS Communications team when rolling out a large-scale change.
- Communicate changes to customers early and often to reduce anxiety and to keep them informed.
- Seek buy-in from key stakeholders at the start of a change to ensure buy-in for the change from the broader organization.
- Stay abreast of what's happening in the marketplace (e.g., new products, skills) and look for opportunities to incorporate new methodologies.

GREAT PROFILE

CREATING TEAM ALIGNMENT

- Create an onboarding process or a checklist to ensure that new team members are quickly brought up-to-speed, and update accordingly as processes change
- Encourage candid feedback on opportunities for improvement from any and all team members.
- Remind the team that their ideas, input, and perspectives matter and are valued.
- Meet with team members face-to-face whenever possible, especially when relaying important news or when having a difficult conversation.
- Connect with team members one-on-one to get to know them on a personal level and to understand what motivates and interests them.
- Align the team, customers, and stakeholders around a set of common goals to be achieved.
- Communicate changes in processes to all team members.
- Invite input and discussion from the team when working through a difficult problem.
- Advocate to management for professional development opportunities (e.g., courses, conference) to help grow team members individually and ITS as a whole.
- Assign team members to stretch opportunities to push them outside of their comfort zones and to drive their development.

GREAT PROFILE

MANAGING MODERN WORKPLACES

- Support new, cost-effective approaches to boost morale and improve culture, and share these approaches with other leaders.
- Ask team members who receive training on a new approach or technology to bring this knowledge back to the team to upskill their colleagues.
- Promote a mentality of “a person doesn’t need to be here physically in order to do great work” with the team.
- Develop personal, human connections with remote employees, while also establishing clear expectations for work hours and deliverables.
- Educate team members on the technological resources available to facilitate productivity.
- Offer flexible scheduling to the team, if and when it’s aligned with business needs.
- Develop and share effective collaboration tools, along with audio/visual and communication protocols, when working across time zones.
- Empower team members to take ownership of their work to create a sense of pride.
- Help team members understand that they all have both strengths and areas in which to grow.
- Tailor communication around Northeastern’s vision to individual team members.

GREAT PROFILE

EMBRACING THE VISION

- Champion the idea that ITS is integral to realizing Northeastern's vision and that it elevates the entire university.
- Motivate the team with a compelling and inspiring vision of ITS's future.
- Speak with conviction about achieving Northeastern's vision and mission.
- Connect Northeastern's vision to ITS's strategy to illustrate its importance.
- Map team members' day-to-day work back to Northeastern's larger vision.
- Encourage team members to consider how the team's goals and Northeastern's vision mutually reinforce and benefit one another.
- Tie communications back to Northeastern's vision.

PLAYBOOK MOMENTS

The Leader

As each leader approaches their work and their teams, there are pivotal moments they may face.

This playbook explains in detail how to handle these moments as a great leader in ITS.

Each moment requires multiple capabilities to be successful. The icons represent the capabilities MOST critical for that moment, though many might be needed.

1	When intaking a potential new project or initiative
2	When day-to-day demands conflict with building capabilities for the future
3	When challenging "doing things the way they have always been done"
4	When a customer has unrealistic expectations and you need to create alignment
5	When a customer is displeased with a team member whom you then need to coach
6	When a team member is underperforming and you need to provide difficult feedback
7	When credibility has been lost with a customer and you're working to rebuild the relationship
8	When a team member's customer service falls below your expectations
9	When a team member is uncertain of how changes will impact them
10	When a team member says they don't know what to prioritize
11	When a team member is "below the line"
12	When a team member decides to move on to a new opportunity
13	When a project or a team member is successful

PLAYBOOK MOMENT 1

Leader Behaviors

When intaking a potential new project or initiative

Great

MINDSET: *Seeing how a project supports ITS's priorities and Northeastern's vision lets us solve it more effectively.*

- Communicate the value of engaging ITS as a partner in selecting new technology or upgrading centralized platforms to accommodate new needs.
- Check to see whether other groups within ITS have something that meets the customer's need.
- Follow the established intake process.
- Ensure that the request and its requirements are clear and aligned with Northeastern's vision and priorities.
- Ask "Is this something we really need?" and "Is this something there is a strong appetite for?"
- Perform a business case to evaluate funding needs.
- Evaluate the resources necessary to deliver the request, considering whether resources need to be brought in or shifted.
- Think through the new project iteratively and provide guidance, such as "if we remove these two features, it's easier to prioritize."
- Collaborate with the customer and talk through what ongoing reports and analysis will look like during the intake phase.
- Communicate risks, and lead the customer toward optimal solutions.
- Be honest and transparent with the customer if the request gets deprioritized.

Not-Yet-Great

MINDSET: *We approach projects one by one without tying them to ITS's priorities and Northeastern's vision*

- Approach the new project as an order taker without consulting the customer on associated risks and opportunities
- Contribute to unnecessary duplication of systems.
- Accept the new project before understanding the need behind it, its impact to customers and ITS, or ITS's ability to deliver it.
- Agree to do anything the customer asks.
- Continue work on a project, even when the customer or the customer's team isn't participating in the planning and development meetings.
- Disregard Project Management Office process.
- Wait for customers to come to you with requests.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT 2

Leader Behaviors

When day-to-day demands conflict with building capabilities for the future

Great

MINDSET: *Developing my team today will allow us to deliver on work tomorrow.*

- Balance the conflicting demands of the team's professional development and the day-to-day workflow.
- Advocate for professional growth opportunities for both self and team.
- Communicate to ITS leadership what can be completed with current staffing.
- Provide job-related development and training opportunities tailored to each individual team member.
- Acknowledge that training may not be immediately transferrable to the job and that there may be a lengthy ramp-up period to gain expertise.
- Partner a team member who is learning a new skill with a more experienced team member to provide support and allow knowledge sharing.
- Block time to explore new opportunities, solutions, and products.
- Check in with and offer support to team members learning a new skill
- Let the team make mistakes in a development environment.
- Stimulate the team to do research and to poke holes in current approaches to get the team thinking.
- Respond with pride and confidence when a team member brings a new idea or skill to the table.

Not-Yet-Great

MINDSET: *My responsibility is to get my team to deliver on work.*

- React to situations, thinking about the needs of tomorrow only when tomorrow is here.
- Prioritize day-to-day work over the development of new skills for team members.
- Refrain from giving team members the opportunity to demonstrate new skills on the job.
- Expect the team to always be proactively training themselves on new capabilities.
- Offer exactly the same development and training opportunities to all team members.
- Give a high-risk project as a first engagement to a team member who's learning a new skill.

Capabilities Needed in This Moment

CREATING CLARITY

LEADING THROUGH CHANGE

EMBRACING THEVISION

Leader Behaviors

When challenging “doing things the way they have always been done”

Great

MINDSET: *Standing ground is losing ground.*

- Embrace new systems and processes to model the behavior changes they ask of others.
- Ask the team to think through customer workflows to determine the right questions to ask.
- Encourage team members and colleagues to share new ideas.
- Ask, “Is this a moment when we can pause action and think differently?”
- Shift conversations from “This is broken and ITS needs to fix it” to “This was broken, and we saw other things we could improve alongside fixing what’s broken in order to surprise and delight customers.”
- Identify stakeholders affected by the change across the university.
- Challenge the team to think through the real-life implications of decision for both ITS and customers.
- Communicate updates, plans, next steps, etc. with affected stakeholders and team members early, often, and transparently to gain their buy-in.
- Encourage customers and team members to embrace the new approach.
- Express sincere appreciation for any new idea shared, even if it’s one that’s not acted upon.
- Eliminate systems, processes, and procedures that no longer work.

Not-Yet-Great

MINDSET: *If it’s not broken, don’t fix it.*

- Are unreceptive to new ideas and approaches.
- Spend more time articulating the benefits of how things are currently done than thinking through how things could be done better.
- Use legacy processes and ways of working, even if they’re no longer sustainable or suitable.
- Send a team member into a meeting with a customer to talk through an issue without first confirming that the team member is equipped for success.
- Communicate a change as a negative that interferes with the team’s work.
- Support colleagues justifying their actions as “doing things the way they have always been done.”
- Use risks, potential drawbacks, and cost as reasons to delay or prevent new ideas that have been vouched for by others from moving forward.
- Fail to act in a timely manner after witnessing detrimental behavior that affects others in the organization.
- Avoid having in-person conversations to discuss important, impactful information, preferring instead to use email or instant messaging.

Capabilities Needed in This Moment

GETTING BETTER EVERY DAY

EMBRACING THE VISION

Leader Behaviors

When a customer has unrealistic expectations and you need to create alignment

Great

MINDSET: *Successful influence means leading with inquiry.*

- Explain the enterprise-wide factors outside of your control that impact the customer's request.
- Walk the customer through the resources and systems required to implement the request to help the customer understand the full scope and impact of the "ask."
- Level set with the customer on what ITS can do to address the request.
- Uncover which parts of the request are flexible, such as the timeline or certain features.
- Ask exploratory questions to understand the customer's desired outcome and determine if the request can be tweaked to make that outcome tenable.
- Point the customer to other available, helpful resources if the request is out of scope.
- Temper unrealistic expectations in the moment to prevent any misunderstanding about ITS and its capabilities.
- Escalate the customer request to the ITS Leadership Team, if necessary.

Not-Yet-Great

MINDSET: *Successful influence means leading with advocacy.*

- Respond to the customer's request with "That will never work" or "We can't help with that"
- Offer a solution to the customer before securing team alignment on the solution's feasibility.
- Recommend software and processes to the customer that haven't yet been vetted by ITS.
- Emphasize what ITS cannot do or provide instead of looking for alternative solutions to the request.
- Set unrealistic expectation on what ITS can deliver when speaking with the customer, setting ITS up for failure.
- Agree to an unrealistic request and then don't follow up on it in the hope that the request will go away.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

CREATING CLARITY

PLAYBOOK MOMENT **5**

Leader Behaviors

When a customer is displeased with a team member whom you then need to coach

Great

MINDSET: *Setbacks will occur as we move quickly; I need to understand why they occur to help the team learn.*

- Assume positive intent from both the customer and the team member.
- Get both sides of the story, ideally face-to-face, to fully understand the situation and make both sides feel heard.
- Take ownership of the complaint before the customer escalates it to the ITS Leadership Team.
- Follow up with what you've learned, even if the customer is known for complaining, to validate the customer's concern.
- Align and empathize with the team member when starting the conversation about the situation.
- Help the team member understand the customer's point of view, even if the negative feedback is unwarranted.
- Communicate appreciation to the customer for bringing the complaint to your attention and explain what ITS is doing to rectify the situation.
- Provide customer support and help the customer toward a resolution, even if the problem is outside of ITS's purview.

Not-Yet-Great

MINDSET: *I need to call out who is responsible for setbacks to make sure the team doesn't repeat them in the future.*

- Fail to take quick action when negative feedback is received.
- Begin the coaching conversation with the team member negatively, starting with "This is what you did wrong."
- Spring the coaching conversation on the team member without warning in a public place.
- Allow emotions to get the best of you during the coaching conversation.
- Dwell on the error without looking for opportunities to resolve the complaint and to preserve the relationship with the customer.
- Point fingers as to who is at fault for the complaint.
- Leave the complaint unaddressed, assuming the ITS Leadership Team will resolve it.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

SERVING AND EMPOWERING THE CUSTOMER

CREATING TEAM ALIGNMENT

When a team member is underperforming and you need to provide difficult feedback

Great

MINDSET: *Speaking the truth and providing feedback in service of development can help us all get better together.*

- Identify when a team member is underperforming and take action.
- Reach out to the team member proactively to see how you can help.
- Hold the performance management conversation soon after soon after noticing that a team member is underperforming and before it develops into a major issue.
- Share feedback with the team member in a private space and face-to-face, whenever possible.
- Cater delivery of the feedback to the team member's personality and preferences.
- Convey that you're providing the feedback in service of the team member's development.
- Ask the team member questions to understand the situation, clarifying any misunderstandings to prevent recurrences.
- Offer the team member opportunities to grow into the development area.
- Set recurring follow-up conversations, if necessary, to track progress and provide support.
- Consider what needs to happen to prevent the same mistake from being made twice.
- Have the courage to manage out consistently poor performers.

Not-Yet-Great

MINDSET: *We should always prioritize solving issues over providing timely, constructive feedback.*

- Ignore the situation, assuming that the team member will figure it out.
- Wait for the team member to take the initiative and to reach out when help is needed.
- Lose temper and get frustrated when providing feedback.
- Deliver feedback long after the situation that led to the feedback in the first place has been resolved.

Capabilities Needed in This Moment

CREATING TEAM ALIGNMENT

EMBRACING THEVISION

PLAYBOOK MOMENT 7

Leader Behaviors

When credibility has been lost with a customer and you're working to rebuild the relationship

Great

MINDSET: *We have to put ourselves in the customer's shoes to know how best to respond.*

- Provide proactive attention to the customer, promptly responding to requests and questions.
- Apologize for the customer's previous experience.
- Ask insightful questions to understand what went wrong and to validate the customer's concerns and provide empathetic service.
- Set up recurring touchpoints with the customer to connect on an ongoing basis and to develop a personal relationship.
- Engage in constructive conversations with the customer, seeking to better understand their needs and discussing what ITS is doing to address them.
- Take ownership of identifying the proper person to resolve the issue, providing this person the context of the situation.
- Communicate to the customer who their point of contact will be.
- Address the root cause of issues to alleviate the customer's pain points and prevent reoccurrences .
- Create institutional knowledge and documentation in order to learn from the situation and prevent reoccurrences.

Not-Yet-Great

MINDSET: *The customer needs to understand ITS's perspective first.*

- Approach the issue transactionally instead of looking for opportunities to connect with the customer on a personal level.
- Ignore or deprioritize meeting invitations from the customer, missing the opportunity to hear the customer's perspective firsthand.
- Assign a resource to the customer without following up.
- Overlook the root concern of the issue, the breakdown in systems that led to it, and how ITS can learn from it.
- Offer the customer hypothetical solutions that ITS isn't equipped to deliver on in practice.
- Look the other way if the customer goes around ITS.
- Refrain from seeking additional information when hearing that the customer is purchasing a new solution outside of ITS.

Capabilities Needed in This Moment

PARTNERING FOR SUCCESS

SERVING AND EMPOWERING THE CUSTOMER

PLAYBOOK MOMENT 8

Leader Behaviors

When a team member's customer service falls below your expectations

Great

MINDSET: *Proactive coaching can save us time and resources in the long run*

- Intervene early when there are clear signs of customer service issues.
- Ask questions first to understand how the team member approaches customer service before assuming it's a performance problem.
- Ask how you can help the team member improve in customer service interactions.
- Give constructive, specific, and timely feedback to the team member on improvement opportunities.
- Suggest that the team member seek out development opportunities, as necessary.
- Emphasize that, in the customer's eyes, the team member is the face of ITS.
- Encourage the team member to complete the necessary groundwork, including research into the customer's history and ITS documentation, prior to meeting with the customer.
- Coach the team member to be someone whom customers can trust and feel comfortable asking questions of.
- Ask senior members on the team how the junior members are performing with customers.

Not-Yet-Great

MINDSET: *My job is to intervene once it's crystal clear there's a problem*

- Ignore "red flags," such as the team member being short in communications with customers or placing customers on hold for extended periods of time.
- Neglect to provide specific examples of how and when the team member's customer service has fallen below expectations.
- Recommend outright, without any discussion, that the team member be placed on a performance improvement plan.
- Add unnecessary complexity or sign-off steps, making it more difficult for the team member to improve in their job.
- Communicate in a terse, short manner when speaking .

Capabilities Needed in This Moment

GETTING BETTER EVERY DAY

EMBRACING THEVISION

PLAYBOOK MOMENT 9

Leader Behaviors

When a team member is uncertain of how changes will impact them

Great

MINDSET: *I need to personalize the ITS and Northeastern strategy for the team.*

- Educate the team on the university's goals, mapping the team's roles to the goals.
- Hold regular meetings to openly and honestly discuss what you know about upcoming changes and how the changes might impact the team.
- Share that you don't have all the answers about what's going to happen.
- Acknowledge that, at some level, there will always be resistance and anxiety toward change but that ITS is continually evolving.
- Articulate why changes are happening in the first place, how they're in service of Northeastern's vision, and how the team's work is contributing to that vision.
- Help connect the dots between the present and future states with a high-level plan of how to navigate the journey.
- Create time for one-on-one meetings with team members to ensure that all concerns are addressed.
- Compel team members to thoroughly review the university's overall goals to inform each team member's yearly goals.
- Clarify how each team member's daily work advances the university's vision.
- Acknowledge team members' feelings, providing frequent, balanced feedback on their efforts and progress.

Not-Yet-Great

MINDSET: *My team needs to just keep their heads down and do their job.*

- Ask "What's in it for me and my team in the short term?"
- Look for short-term fixes or ways to cover up old processes that they want to retain.
- Fail to communicate how team members are integral to change.
- Keep team members in the dark as to the "why" of change.
- React to the changes with negative emotions in front of the team.
- Dismiss aspects of the changes that the team disagrees with upfront.
- Focus only on the drawbacks, challenges, and risks of the changes.
- Allow the team to fester and ruminate over changes.
- Communicate that "We're doing this because leadership says so."
- Oversell the benefits and under emphasize the drawbacks and risks of the changes.

Capabilities Needed in This Moment

CREATING CLARITY

MANAGING MODERN WORKPLACES

EMBRACING THEVISION

PLAYBOOK MOMENT **10**

Leader Behaviors

When a team member says they don't know what to prioritize

Great

MINDSET: *To move forward, we should prioritize based on desired outcomes rather than activities*

- Communicate that it's the team member's responsibility to "ask up" to determine priorities.
- Empower the team member to ask "what if" and "how about we" questions when determining how to prioritize work.
- Suggest that the team member allocate time to being strategic, planning ahead, and anticipating problems.
- Review the team member's backlog to determine whether the team member can reasonably be expected to complete the work or whether it's a resourcing issue.
- Advise the team member to generate backlog reports to identify trends and themes.
- Reassure the team member that you're available should additional support be needed.
- Provide clarity and direction for the team member on how to manage their backlog strategically.
- Encourage the team member to view the backlog as a source of opportunity.
- Emphasize that it's okay to have a backlog of work as long as the team member understands why the backlog is there.

Not-Yet-Great

MINDSET: *We should jump in and get going.*

- Encourage the team member to prioritize activities over outcomes.
- Relay to the team member that every item on the backlog is a priority and has to be completed quickly.
- Make the team member feel bad about not knowing what to prioritize.
- Serve as a gatekeeper for the team's work, forcing team members to come to you for clarification on what to prioritize.
- Perform the team member's work if the team member is overloaded, rather than directing them toward training, educating, or rebuilding processes.

Capabilities Needed in This Moment

CREATING CLARITY

CREATING TEAM ALIGNMENT

PLAYBOOK MOMENT **11**

Leader Behaviors

When a team member is "below the line"

Great	Not-Yet-Great
MINDSET: *Our job is to explore and get it right.*	**MINDSET:** *Our job is to know and to be right.*
• Share expectations of what behavior is "above the line" and what falls "below the line" with the team. • Model being "above the line" for team members to help standardize the behavior. • Acknowledge to the team member that everyone is going to fall "below the line" occasionally. • Recognize and constructively call out when a team member is falling "below the line." • Share how and why the team member's actions fell "below the line." • Advise the team member to pause and reflect in the moment when falling "below the line." • Discourage the team member from festering "below the line," reminding them how easy it is to get back above it. • Communicate the personal and teamwide benefits of staying "above the line" and the positivity that will result. • Encourage the team member to do the next right thing in order to course-correct and get back "above the line."	• Delay coaching conversations with the team member, allowing the negativity to spread to others on the team. • Meet the team member "below the line" and stay there with the team member. • Give unspecific feedback on why the team member's actions fell "below the line." • Allow the team member to introduce obstacles and negativity by staying "below the line" for an extended period.

Capabilities Needed in This Moment

PLAYBOOK MOMENT **12**

Leader Behaviors

When a team member decides to move on to a new opportunity

Great

MINDSET: *My job is to help my team members grow and advance professionally, no matter where that might take them.*

- Publicly and privately express sincere appreciation for the departing team member's contributions.
- Collaborate with the team member to communicate their leaving to the rest of the team.
- Emphasize that the team member is pursuing a new opportunity to grow their professional skillset, and set a positive tone for the departure.
- Clearly redefine roles in advance of the transition to allay the other team members' concerns about the change and their workloads.
- Ask the departing team member what they enjoyed and what they didn't enjoy about their position and Northeastern's culture.
- Consider the relative strengths and weaknesses of the departing team member, and look for ways to build for or hire talent that complements the rest of the team.
- Communicate excitement around a new team member joining and the new ideas they can bring to ITS.

Not-Yet-Great

MINDSET: *When talent moves on, it sets the team back.*

- Fail to take action to redistribute the workload, presuming that the team won't be affected by the team member's leaving.
- Contribute to gossip around the reason for the team member's departure.
- Get stuck in the "How will work get done now?" mindset.
- Express frustration or disappointment with the team member's decision.
- Provide minimal recognition of or appreciation for the departing team member.
- Become overwhelmed with the task of recruiting, selecting, hiring, and training a new team member.

Capabilities Needed in This Moment

LEADING THROUGH CHANGE

MANAGING MODERN WORKPLACES

PLAYBOOK MOMENT **13**

Leader Behaviors

When a project or a team member is successful

Great

MINDSET: *Celebrating accomplishments fosters an environment in which everyone can, and wants to, succeed.*

- Define success indicators to identify when a project or team member has achieved success.
- Actively ask the team what their accomplishments and wins have been.
- Celebrate in a way that's meaningful and specific to the successful team member or project team.
- Recognize successful projects and team members publicly.
- Encourage both formal and informal celebrations through existing ITS programs when a project or a team member is successful.
- Share the success with the ITS Leadership Team and in broad communications, such as the Team ITS Praise channel.
- Show how project and team member successes directly contribute to Northeastern's Beyond 2025 strategic plan.
- Carry forward lessons learned from the successful project or the successful team member to drive success throughout ITS.

Not-Yet-Great

MINDSET: *Everyone knows what "great" looks like; there's no need to celebrate it.*

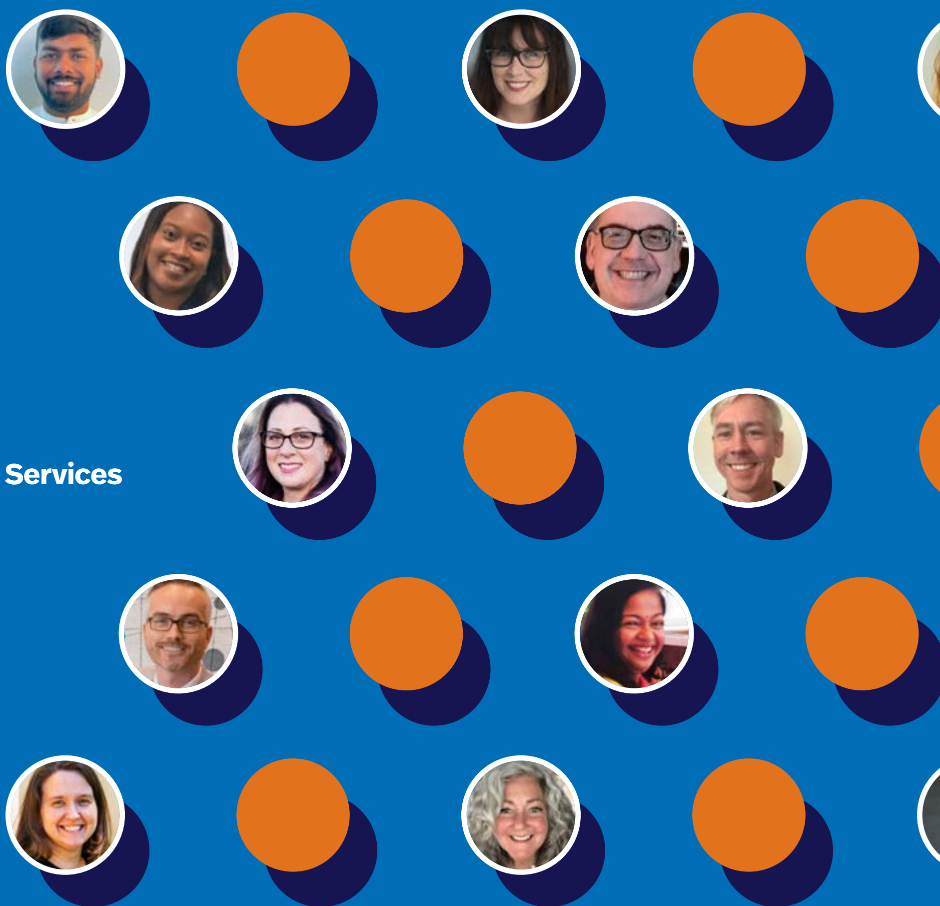
- Recognize only major project successes, neglecting the everyday successes of team members.
- Quickly move to the next project before taking time to recognize the team's success on a previous project.
- Take credit for the team's accomplishments when mentioning them to others.
- Hold the team accountable for standards that weren't initially set, moving the goal posts mid-project.

Capabilities Needed in This Moment

GETTING BETTER EVERY DAY

CREATING TEAM ALIGNMENT

MANAGING MODERN WORKPLACES



Northeastern
Information Technology Services

The Team ITS Playbook is produced by the Office of the Chief Information Officer, IT Communications Department.

FY24 TEAM ITS ORGANIZATIONAL GOALS

Individual Contributors and Leaders

As part of Northeastern University's Performance and Development Cycle, full-time ITS staff set and track the same organizational goals, as well as an additional 2-3 goals that support personal, departmental, ITS, or university goals.

Set goals in collaboration with your manager at the start of the fiscal year and continuously discuss, track, and adjust them when needed.

Use the following organizational goals for planning and development. Specific moments from the Team ITS playbook are included so that they can be referenced and used to assess what great performance looks like for each goal.

BUILD AND MATURE COLLABORATIVE RELATIONSHIPS

Build and nurture relationships within and across Northeastern's global network, as well as outside of it. Be open to new opportunities, share a common vision, be clear on your role and responsibilities, and communicate clearly.

- **Individual Playbook Moments: 2, 4, 5, 6, 8, 9, 10, 12, 13**
- **Leadership Playbook Moments: 1, 2, 4, 5, 7, 10, 11, 13**

GROWTH

Work towards your own professional growth and assist colleagues with their growth as appropriate. Make positive choices, offer constructive feedback to others, engage in experiences to better one's understanding of organizational initiatives, and participate in furthering one's knowledge in areas determined by the department.

- **Individual Playbook Moments: 2, 3, 8, 9, 10, 12, 13**
- **Leadership Playbook Moments: 2, 5, 6, 8, 11, 13**

EXPAND DIVERSITY, EQUITY, AND INCLUSION AWARENESS

Continue to enhance understanding of diversity and inclusion issues. Participate in professional activities that would increase experience in interacting with people from across the global network and from cultural backgrounds other than your own. Leaders can promote and value participation in mentoring, training, and professional development activities by providing applicable time and rewarding contributions to diversity and inclusion during performance appraisal, merit, and promotion decisions.

- **Individual Playbook Moments: 3, 10, 11, 12**
- **Leadership Playbook Moments: 2, 6, 12, 13**

OPERATIONAL AND DIGITAL EXCELLENCE

Create value for the global, digital university by focusing on processes, assuring quality at the source, respecting every individual, leading with humility, and thinking systematically.

- **Individual Playbook Moments: 1, 4, 5, 7, 9, 10, 11**
- **Leadership Playbook Moments: 1, 3, 4, 6, 8, 9, 10, 13**

Northeastern University
Information Technology Services

The organizational goals may change from year-to-year, evolving with the IT organization and Northeastern University. For timelines and other resources related to Northeastern University's Performance and Development Cycle, visit its.northeastern.edu/goals.