

Coffee chat series - general guidance

(by Eonju Lee on Mar 31, 2022)

I've organized the coffee chat series with teams that our UX teammates would like to get to know better. Here's general guidance on how to set this up for your team.

1. [3-4 weeks before] Start a planning doc to plan to note the goal of the sessions, attendees, and possible teams you would like to collaborate with. Ask your team members which teams they are interested in learning from. (I chose CEA, AMs, ARs in mind since we don't meet with them, but they are in direct and daily communication with our users.)
2. [3 weeks before] Reach out to the head of the team. (e.g.: I chose the CEA team lead for the first coffee chat series, since I knew him from past meetings and 1:1s, so I was able to easily initiate the session.) Once you've secured the team lead:
 - a. Clarify with the lead that you are not taking their team's additional time and they don't need to prepare anything for the meeting, so they don't expect extra work on their part, which may push back your request.
 - b. Discuss your plan in detail, the goal (e.g., to give an opportunity to connect and learn from each other and learn how their teamwork with our customers, understand the #1 customer issues, etc.), general meeting structure, approximated date, and the time.
 - c. Recommend having 1:1 over Slack to get more connected with the team lead, take enough time to plan and discuss on a detailed agenda, time, and date.
3. [2.5 weeks before] Add the discussed agenda to the doc and share it with the lead.
 - a. The agenda can be simple.
 - i. Meet and greet (everyone) - 5mins
 1. Give them a guide to round robin introduction: Your name, role and what is your favorite coffee or tea? (Try to add one icebreaker question)
 - ii. Team introduction (each team lead) - 15mins
 1. Team structure, location, main tasks and responsibility
 2. If they have existing presentation deck for their team, have them share
 - iii. Q&A (question to their team) - 30mins
 - iv. Questions for UX team and closing - 10mins
4. [2 weeks before] Send a meeting invite to the team. Schedule ahead of time, give at least 2 weeks, so more people can join.
 - a. Consider the time zone.
 - b. It will be easier to get the specific date and time from the team lead during your initial conversation.

- c. In your invitation email, give everyone some context with a simple agenda and get them excited about this conversation.
5. [1-2 weeks before] Share the doc with your team to gather some team's questions (during team weekly meeting or the team slack channel - post at least two times to remind)
6. [2-3 days before] Slack to the team lead and the members to introduce yourself and share the agenda doc with your questions so that they can get prepared. Also, ask them to add their questions to our team if they have any questions. In addition to the slack message, send the invitation email again with the updated agenda doc.
7. [D-day] Coffee chat
 - a. Ask a team member or your DPM to be a timekeeper and a note-taker.
 - b. Record the video if people are comfortable
 - c. Take it easy, go with the flow. :)
8. [1-2 days after] Recap the meeting, and plan for the next step. (e.g., gather some action items from the meeting, think of a new idea on next coffee chat, etc)

Some quotes from the participated team

"I've never had this conversation and experience with product design. I love this! I'm happy to help contribute to vision and innovation in the future." - Billy Snider , Account Manager, Emerging Verticals (Billy has been at Lyft for 9+ years)

"Thank you! Our team really enjoyed hearing more about your team!" - Zen Stevensson-Zenith , Support Delivery Team Lead