

Preparatory Tasks

Check List

In the following, you find an overview (serving as a check list) for the preparatory work for the workshop “How to manage your PhD project: Identifying opportunities and challenges – setting the compass”. The preparatory tasks add up to 32.5 hours so that together with the workshop contact hours, the total amount add up to 50 hours which are equal to 2 ECTS. You don’t need to follow the proposed sequence of tasks. During the workshop we will just go through topics in a similar sequence. The **tasks in bold** need a longer duration, so please read them first and plan the appropriate time for them.

- ☐ Stakeholder Analysis – Mapping Your Research Environment
- ☐ Your PhD as a Business Model – Applying the PhD Model Canvas
- ☐ Structuring Your PhD – Creating a Work Breakdown Structure
- ☐ **Interview with your Supervisor and a Key Stakeholder – Understanding the PhD Journey from Different Perspectives**
- ☐ Understanding the Rules – Doctoral Regulations and Unwritten Expectations
- ☐ Risk and Concern Assessment – Planning for the Unexpected
- ☐ Thinking Beyond the PhD – Exploring Career Pathways
- ☐ **Understanding Working Styles – You and Your Supervisor**
- ☐ The Five Drivers – Understanding Your Inner Drivers in Research and Collaboration
- ☐ Leisure–Work Balance Analysis – Designing a Sustainable PhD Life
- ☐ Reflecting on Your Motivation – Why You Started and What Keeps You Going
- ☐ **Time and Task Management – Building Awareness and Creating Structure**

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Preparatory Task (2 hours)

Stakeholder Analysis – Mapping Your Research Environment

Understanding who is involved in and affected by your research is an essential skill for navigating your PhD journey. This task will help you reflect on the people and groups that influence your work – directly or indirectly – and how to engage with them effectively.

1. Identify Your Stakeholders:

Think about the various individuals, groups, and institutions connected to your PhD project. This could include your supervisor(s), lab colleagues, collaborators, administrative staff, funders, industry partners, or even potential users of your research. Include both internal (within your institution) and external stakeholders.

2. Map Their Roles and Interests:

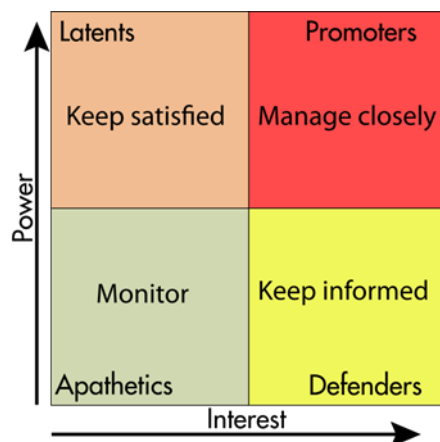
For each stakeholder, consider:

- What is their role in your research or academic environment?
- What are their interests, expectations, or concerns?
- How much influence or power do they have over your project or progress?
- How often and in what way do you interact with them?

3. Create a Stakeholder Map:

Familiarize yourself with stakeholder mapping by reading e.g.

https://en.wikipedia.org/wiki/Stakeholder_analysis



Use a simple table or a 2x2 matrix (e.g., influence vs. interest) to visually organize your stakeholders. This will help you see where you might need to invest more in communication, alignment, or relationship-building.

4. Reflect on Engagement Strategies:

Based on your analysis, think about how you can better manage your relationships with key stakeholders. Are there any important connections you need to strengthen? Are there potential tensions or mismatches in expectations to be aware of?

Bring your stakeholder map and reflections to the workshop – we'll use them to discuss how early awareness of your research environment can help you avoid misunderstandings, manage expectations, and build a stronger foundation for your PhD.

Preparatory Task (2 hours)

Your PhD as a Business Model – Applying the PhD Model Canvas

In this task, you will use the PhD Model Canvas, a tool adapted from the startup world, to think strategically about your PhD project and its broader context. The version proposed by Hoffmann and Drath in “How to Survive a PhD – Using Design Thinking Methods and the Business Model Canvas” helps structure the different elements of your research in a clear, visual format. The pdf of the Publication is attached.

It makes sense to first conduct the Stakeholder Analysis preparatory task, as you can use the results from this for your PhD Model Canvas exercise.

- 1. Make yourself familiar with the Business Model Canvas (BMC) and the PhD Model Canvas:**
Read e.g. the Wikipedia page https://en.wikipedia.org/wiki/Business_model_canvas or other sources to make yourself familiar with BMC. In the following, please read the attached pdf of the PhD Model Canvas.
- 2. Download the Canvas Template:**
Empty template: https://r-drath.de/download/bmc_for_phd_template_v2.pdf
Template with explanations: https://r-drath.de/download/bmc_for_phd_templatewithguidance_v2.pdf
The canvas includes key areas like your research “value proposition,” key partners, resources, communication channels, and more.
- 3. Fill in Each Section Thoughtfully:**
The following image shows the sequence you should work through the PhD Model Canvas (please see also the publication and template with explanations..

Key Partners 3	Key Activities 3 Key Resources 3	Value Propositions 2	Customer Relationships 4 Channels 4	Customer Segments 1
Cost Structure 5		Revenue Streams 5		

- 4. Be Honest and Explorative:**
This is not about having all the answers — it’s about exploring the different dimensions of your project and how they fit together. Feel free to jot down questions or uncertainties as well; they’re valuable for the next steps.
- 5. Prepare to Share and Discuss:**
Bring your completed (or work-in-progress) canvas to the workshop. We’ll use it as a basis for peer discussions and to identify areas where you might want to adjust your approach, seek support, or redefine goals.

This exercise will help you take a step back from the day-to-day details and see your PhD as a system — with people, processes, risks, and opportunities — that you can actively shape.

[1] <https://ieeexplore.ieee.org/abstract/document/9766528>

Preparatory Task (2 hours)

Structuring Your PhD – Creating a Work Breakdown Structure (WBS)

A PhD is a complex and long-term project, and like any large project, it becomes more manageable when broken down into smaller, structured parts. In this task, you will use the *Work Breakdown Structure (WBS)* method to create a first draft of your PhD project structure.

1. Understand the WBS Approach:

The WBS is a project management tool used to break a large task (like a PhD) into smaller, more manageable components. It helps to clarify scope, define deliverables, and plan timelines. If you're new to WBS, a quick search or video can give you a good visual idea of how it works. Again Wikipedia provides also something: https://en.wikipedia.org/wiki/Work_breakdown_structure

2. Break Down Your Project:

Start by writing your overall PhD project or research topic at the top level. Then, divide it into major components — for example: literature review, data collection, methodology development, publications, training, thesis writing, etc. Continue breaking these down into sub-tasks where possible (e.g., data collection might involve designing instruments, recruiting participants, conducting experiments, etc.).

3. Aim for Structure, Not Perfection:

This is a first draft and should reflect your current understanding. Don't worry if some parts are vague or incomplete — include what you know and highlight areas where you have questions or need input. You can use a tree diagram, a table, or digital tools like MindMeister, Miro, or even PowerPoint or Word.

4. Bring Your WBS to the Workshop:

We'll use your draft WBS in the workshop to discuss planning strategies, identify hidden risks or dependencies, and help you turn your research vision into an actionable roadmap.

This task will help you start thinking about your PhD as a structured project, with realistic milestones and clear components you can plan for and manage over time.

Preparatory Task (4 hours)

Interview with your Supervisor and a Key Stakeholder – Understanding the PhD Journey from Different Perspectives

To gain deeper insight into the realities of doing a PhD – beyond your own experience – this task invites you to conduct short interviews with two key people connected to your academic environment:

- Your **supervisor** (or a member of your supervisory team), and
- One other important **stakeholder**, such as a senior PhD student, postdoc, lab manager, or external collaborator.

The goal is to explore their experiences, expectations, and reflections on doing a doctorate, including the challenges they faced and the strategies they used to overcome them.

1. **Set Up Two Short Conversations:**

Each interview can be informal and take around 20–30 minutes. Be transparent about the purpose: You're doing this as part of a workshop to better understand the dynamics and demands of doctoral work.

2. **Suggested Questions to Ask:**

Feel free to enhance these depending on the person you're interviewing and your interest:

- What were the biggest challenges during your own PhD?
- What helped you stay motivated and on track?
- Were there any unexpected opportunities that shaped your path?
- How did you manage your relationship with your supervisor/supervisees?
- Looking back, what would you have done differently?
- From your perspective, what are the biggest challenges PhD students typically face at the beginning of their journey?
- What advice would you give to someone just starting their doctorate?
- What opportunities should early-stage PhD students try to take advantage of?
- What habits, attitudes, or behaviors do you think help PhD students succeed?
- How do you think students can best manage expectations — their own and others' — during the PhD?
- What are some common pitfalls or mistakes you see early PhD students make?
- How do you define a successful PhD experience — beyond finishing the dissertation?
- In your view, what is your role in supporting a PhD student?
- How can students build good relationships with supervisors, peers, and other stakeholders?

3. **Take Brief Notes and Reflect:**

You don't need to transcribe the interview, but jot down key insights, especially anything that surprised you or challenged your assumptions. Think about how their experience might inform your own approach to the PhD.

4. **Be Ready to Share Insights:**

Bring your reflections to the workshop. We'll use them as a basis for group discussions about realistic expectations, relationship management, and making the most of the PhD journey.

This task will help you build a richer understanding of the doctoral experience, while also opening valuable conversations with the people who influence your research environment.

Preparatory Task (1 hour)

Understanding the Rules – Doctoral Regulations and Unwritten Expectations

Every doctoral program is governed by formal regulations — but in practice, there are often unwritten expectations that shape how things actually work. In this task, you will familiarize yourself with the official framework for your doctorate and clarify any questions or hidden norms with your supervisor.

1. **Read the Doctoral Regulations:**

Find and carefully read the official doctoral regulations of your department or graduate school.

These outline essential requirements such as admission criteria, structure of the thesis, publication rules, submission process, supervision standards, and the examination procedure.

2. **Note Down Questions or Points of Confusion:**

As you read, highlight any terms or rules that are unclear or seem open to interpretation. Make a list of things you'd like to ask your supervisor about, such as:

- Are there minimum or maximum publication requirements?
- How is “independent research” assessed?
- What are the expectations around coursework or teaching?
- What timeline is considered realistic in this environment?

3. **Discuss with Your Supervisor:**

Arrange a short meeting or include this topic in your next scheduled discussion. Ask your supervisor about:

- How they interpret key regulations in practice
- Whether there are any *unwritten* norms (e.g. publishing in specific journals, attending certain conferences, team responsibilities, etc.)
- Their expectations for milestones and progress reporting

4. **Bring Key Takeaways to the Workshop:**

Be ready to share one or two insights from your reading and conversation. We'll reflect on how understanding both formal rules and informal expectations can help avoid misunderstandings and build a more transparent and productive PhD experience.

This task is about empowering you to take ownership of your doctorate by understanding the system you're working in — both on paper and in practice.

Preparatory Task (2 hours)

Risk and Concern Assessment – Planning for the Unexpected

Doing a PhD inevitably comes with uncertainty. This task invites you to think proactively about potential risks, concerns, or obstacles you might encounter during your doctoral journey — and to develop possible strategies for dealing with them.

1. Identify Your Risks and Concerns:

Reflect on what currently worries you or feels uncertain about your PhD project. These might be personal (e.g. motivation, time management), interpersonal (e.g. relationship with your supervisor), or project-related (e.g. funding, experiments not working, data access, etc.).

2. Categorize and Prioritize:

Try to group your concerns into categories (e.g. academic, organizational, personal) and consider which ones feel most critical or most likely to occur. It can help to distinguish between things you can influence and things you can't.

3. Develop Response Strategies:

For each key risk or concern, formulate a response plan using the following format:

If X happens, I will try Y.

Example:

- *If I lose motivation halfway through, I will try scheduling a regular check-in with a peer for accountability.*
- *If I get inconclusive results, I will talk to my supervisor early about adjusting the project scope.*
- *If the relationship with my supervisor becomes difficult, I will reach out to a trusted mentor or advisor.*

4. Bring Your Reflections to the Workshop:

You don't need to share deeply personal details, but we'll use this exercise to talk about common risks in the PhD process, normalizing challenges and exploring healthy, constructive ways of dealing with them.

This task is about building resilience and confidence — not by pretending problems won't arise, but by being prepared to respond thoughtfully when they do.

Preparatory Task (3 hours)

Thinking Beyond the PhD – Exploring Career Pathways

While your PhD is a major focus right now, it's never too early to start thinking about what might come next. This task invites you to reflect on possible career paths after the doctorate — and to develop flexible, realistic plans for different scenarios using the “Plan A / Plan B” model.

1. **Reflect on Your Aspirations:**

Take some time to think about what motivates you, what kind of work environment you enjoy, and how you want your career to feel — not just what job title you want to hold. Consider factors like work–life balance, values, stability, challenge, location, etc.

Please exchange your ideas with a few people that know you very well and can give you feedback.

2. **Sketch Out Three Career Plans:**

Use the following model to explore multiple directions:

- **Plan A:** Your *ideal scenario* — the path you would pursue if everything goes well (e.g. academic career, specific research role, industry R&D).
- **Plan B:** A *realistic and appealing alternative* if Plan A doesn't work out or takes longer than expected.

Please exchange your plans also with those people that know you very well and can give you feedback.

For each plan, briefly note:

- The type of job or sector
- What excites you about it
- What steps you would need to take to get there (skills, networking, experience)
- Potential challenges
- Potential employers

3. **Don't Worry About Having It All Figured Out:**

Your plans will evolve over time — this is just a starting point to increase awareness of your options and the steps you might take during your PhD to stay open and prepared.

4. **Bring Your Plans to the Workshop:**

We'll use this exercise to open a conversation about career planning, transferable skills, and how to make your PhD work for your future — whatever that may look like.

This task is about curiosity, not commitment. The goal is to explore possibilities and take ownership of your future path, one step at a time.

Preparatory Task (6 hours)

Understanding Working Styles – You and Your Supervisor

Please complete the following exercise to help you reflect on your own working style and how it might interact with that of your supervisor. This task is designed to raise awareness about personality-driven differences in communication, collaboration, and expectations in the research environment.

Personality tests like this can offer helpful insights, but they are only one lens through which to view human behavior. People are complex and context matters. Labels like "Extraversion" or "Open-Mindedness" can be useful for reflection, but they shouldn't be seen as fixed categories. Use this task as a starting point for thinking more deeply about how you and your supervisor work — not as a way to put yourselves or others into rigid boxes.

1. **Make you familiar with the basics of the Big-Five Inventory-2 (BFI-2):**
Read e.g. the Wikipedia page https://en.wikipedia.org/wiki/Big_Five_personality_traits or other sources to make yourself familiar with the test.
2. **Take the Personality Test:**
Go to <https://www.personalityassessor.com/big-five2/> and complete the personality test. Take note of your results or just save the resulting page to a file.
3. **Put Yourself in Your Supervisor's Shoes:**
Take the test a second time – this time, answer the questions as you think your supervisor would. Try to be as honest and objective as possible, based on your experiences and observations.
4. **Reflect on the Results:**
 - Compare the two profiles. Where do you and your supervisor seem aligned? Where are differences?
 - Use the e.g. the internet and/or chatbots to research the strengths and weaknesses of *each* of your five dimensions (with each three sub items) individually. Best would be to generate a table from the results.
 - Then, explore what happens when these two types interact: What potential strengths could arise from your differences? Where might challenges appear?
5. **Develop Strategies:**
Depending on your own working preferences, your supervisor's potential style, and how the combination might shape your relationship, please start developing ideas for good ways to communicate, organize your work relation, management of expectations, and ways for effective collaboration.
6. **Reflect on the process:**
What have you learned about you and your supervisor during the process? Summarize the most relevant aspects.

Preparatory Task (3.5 hours)

The Five Drivers – Understanding Your Inner Drivers in Research and Collaboration

This task is about exploring your internal “drivers” — the unconscious patterns that influence how you behave, communicate, and handle stress. Based on the model by Taibi Kahler, the Five Drivers (*Be Perfect, Be Strong, Try Hard, Please Others, and Hurry Up*) each have both strengths (superpowers) and potential downsides, especially under pressure.

1. **Take the Driver Test:**

Use the provided PDF to complete the self-assessment, relate the answers to your *professional* context (independent of this task you may want to take the test again for the *private* context). Read through the descriptions of each driver, paying close attention to the one(s) that score highest for you. You may notice you relate strongly to one or have a mix of two or sometimes even three.

2. **Reflect on Your Main Driver(s):**

Think about how your dominant driver shows up in your academic life:

- What are the strengths of this driver in research and teamwork?
- In what situations might this driver lead to stress, misunderstandings, or unproductive habits?
- What strategy do you want to put in place to more consciously use the positive aspects of your drivers and get aware of and in best case reduce the negative aspects?

3. **Do a Bit of Extra Research:**

Use online sources or chatbots to dig deeper into your key driver(s). Focus especially on how they influence:

- Communication: How do you tend to express yourself or react under pressure?
- Collaboration: What kind of team roles do you naturally fall into? What might others appreciate or find challenging?
- Stress Management: How does your driver shape your stress responses? What helps you rebalance?

4. **Bring Your Insights to the Workshop:**

Be prepared to share one or two things you learned about how your driver affects your day-to-day PhD experience — and how awareness of it might help you grow.

This task is about building emotional intelligence and learning how to work with your patterns, not against them. Your drivers are powerful — the goal is to make them conscious and constructive.

Preparatory Task (2 hours)

Leisure–Work Balance Analysis – Designing a Sustainable PhD Life

A PhD is not just an academic project — it's a phase of your life. Striking a healthy balance between work and leisure is essential for long-term motivation, mental health, and overall well-being. This task invites you to reflect on how you currently spend your time, and how you would *like* to balance your life during the PhD.

1. **Track Your Current Balance (Roughly):**

Think about a typical week. Estimate how many hours you currently spend on:

- Research and academic work
- Teaching or side jobs
- Administrative or organizational tasks
- Social activities
- Hobbies or creative pursuits
- Exercise, relaxation, sleep

You don't need to be exact — a rough breakdown is enough to show the big picture.

2. **Reflect on What Feels Balanced (or Not):**

Ask yourself:

- What areas feel overloaded or neglected?
- What do you wish you had more time for?
- Are there habits or pressures affecting your balance (e.g. perfectionism, guilt, time management issues)?

3. **Design Your Ideal Week:**

Create a rough sketch of how your *ideal* week during the PhD would look — one that feels productive *and* sustainable. Consider blocks for focused work, rest, movement, creativity, and social time.

4. **Bring Your Reflections to the Workshop:**

We'll use this task to talk about time management, setting boundaries, and building a PhD experience that supports both your academic goals and your personal well-being.

This task is not about squeezing in more — it's about making conscious choices, setting healthy rhythms, and remembering that your energy is your most important resource during your PhD.

Preparatory Task (2 hours)

Reflecting on Your Motivation – Why You Started and What Keeps You Going

Your motivation is the fuel for your PhD journey — and understanding what drives you can help you stay focused, resilient, and connected to your purpose when challenges arise. In this task, you'll explore both your initial reasons for starting a PhD and the sources of motivation that can help sustain you over time.

1. **Look Back: Why Did You Start a PhD?**

Take a few minutes to reflect on what motivated you to pursue a doctorate in the first place. Try to identify both and be as specific, honest, and extensive as possible:

- **Intrinsic motivations** (e.g. curiosity, love of research, desire to solve a problem, intellectual challenge)
- **Extrinsic motivations** (e.g. academic career goals, job prospects, scholarships, social status, encouragement from others)

What mattered most to you when you made the decision?

2. **Look Ahead: How Will You Stay Motivated?**

Now consider:

- What aspects of your work give you energy or joy?
- What do you find difficult or demotivating?
- How do you usually regain motivation when things get tough?
- What support systems or habits help you stay on track?

3. **Write Your Motivation Sentence:**

Based on your reflections, write one powerful sentence that captures *your personal reason* for doing a PhD — something meaningful, honest, and motivating.

Example: *"I'm doing this PhD because I believe my research can make a difference and I want to grow through this challenge."*

4. **Bring It With You:**

Write your sentence somewhere visible (your notebook, laptop, office wall, etc.) and bring it to the workshop. We'll use it as a reminder of why this journey matters to you — especially during the inevitable ups and downs.

This task is about connecting to your purpose, strengthening your inner drive, and reminding yourself that you are here for a reason — and that reason matters.

Preparatory Task (3 hours)

Time and Task Management – Building Awareness and Creating Structure

Managing your time and tasks effectively is essential for navigating the demands of a PhD in a healthy and productive way. This two-week task will help you reflect on your current habits and experiment with a structured planning approach.

Week 1: Awareness Week – Reflecting on Daily Habits

At the end of each day, take 5–10 minutes to reflect on how you managed your time and tasks. You can jot your thoughts in a notebook or digital document. Focus on:

- What tasks you completed (planned or unplanned)
- How realistic your plans were
- When you took breaks — and how they affected your focus or energy
- What felt satisfying or frustrating about the day
- Any patterns you notice (e.g. energy slumps, distractions, productive hours)

This week is about *observation*, not judgment. Be honest and curious.

Week 2: Planning Week – Using a Daily Planner Sheet

You will find a day planner template as pdf. Each morning (or the evening before), take 5–10 minutes to:

- Define your key tasks for the day
- Estimate how long each task will take
- Set priorities (e.g. must-do, should-do, nice-to-do)
- Schedule realistic breaks

At the end of each day, reflect briefly on:

- What went as planned, and what didn't?
- Were your time estimates realistic?
- Did you take enough breaks? Too few? Too many? How is your stress level in comparison to the last week?
- What would you adjust for the next day?

Bring Your Reflections to the Workshop:

We'll use this exercise to explore personal time rhythms, common planning traps, and strategies to improve focus, manage expectations, and reduce stress.

This task is not about becoming perfectly efficient — it's about building time awareness and learning what works for *you*.