MAXDAYS
MAXQDA VIRTUAL CONFERENCE

Using MAXQDA for Teamwork

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General Best Practices

The foundation for successful teamwork is clarity within the team about how the analysis process should proceed. The strategies and tools below will help your team achieve this. For more detailed information, see the free MAXQDA guide on teamwork by Stefan Rädiker and Andre Morgenstern-Einenkel, as well as our short videos. For a more in-depth overview of our own teamwork processes, check out our free article on virtual teamwork here.

Have a Data Management Plan

- How the data set is structured
- How many team members are involved in a certain stage of research
- Who works with which portions of the data
- How often the data is exchanged between team members and in which way
- How data is stored and shared

Understand the Important Roles & Responsibilities for Teamwork

- **Project Leads:** Responsible for determining scope of analysis, deliverables, and methodological/procedural design.
- **Project Manager**: Responsible for setting up and managing the MAXQDA file, and for communicating with Analysis Team members regarding concrete analytic tasks. In our case this role was filled by one of the Project Leads.
- **Analysis Team Member:** Responsible for the initial analysis of the dataset, and for writing reports in collaboration with the Project Leads. In our case, the Analysis Team Members consisted of our team of *Student Evaluators* and the Project Leads.
- **Data Users:** Subsequent analysts who use the pre-coded dataset, such as Institute-affiliated Program Development & Evaluation Specialists and Extension Program Managers.

Collaborate early and often

- Document decisions and interpretation early and often
- Do simulated analysis runs early and often
- Empower & train your team members (take turns driving the software)

Use Memos & the Document System to Organize Work

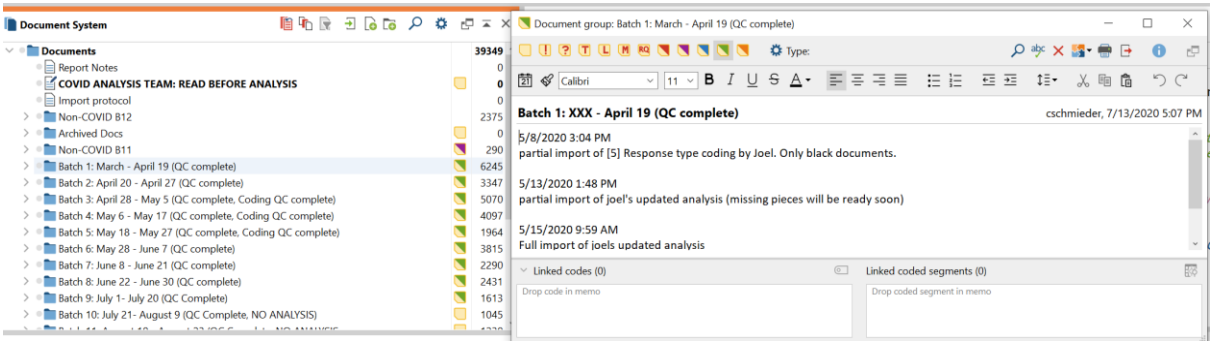

Fig 1: Import new data into new document groups to keep batches at a manageable size. Using document groups makes assigning work easier, and you can easily import/export teamwork in batches based on document groups. Use document group names, memos, and color to convey data scope & status.

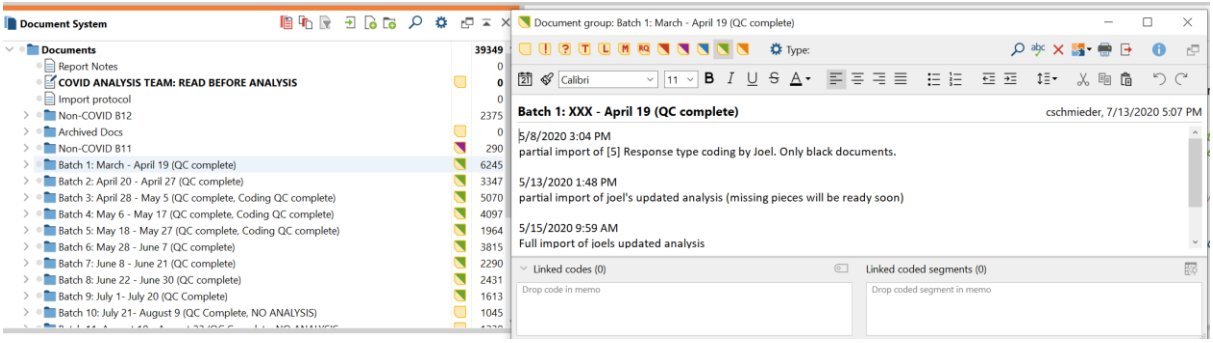

Fig 2: Use Root Folder documents to provide instructions, clarify analysis roles, outline broad workflows, and show finished analytic products or team meeting notes. This helps make the project file your 1-stop shop for teamwork, and transforms it into a team communication and project management tool.

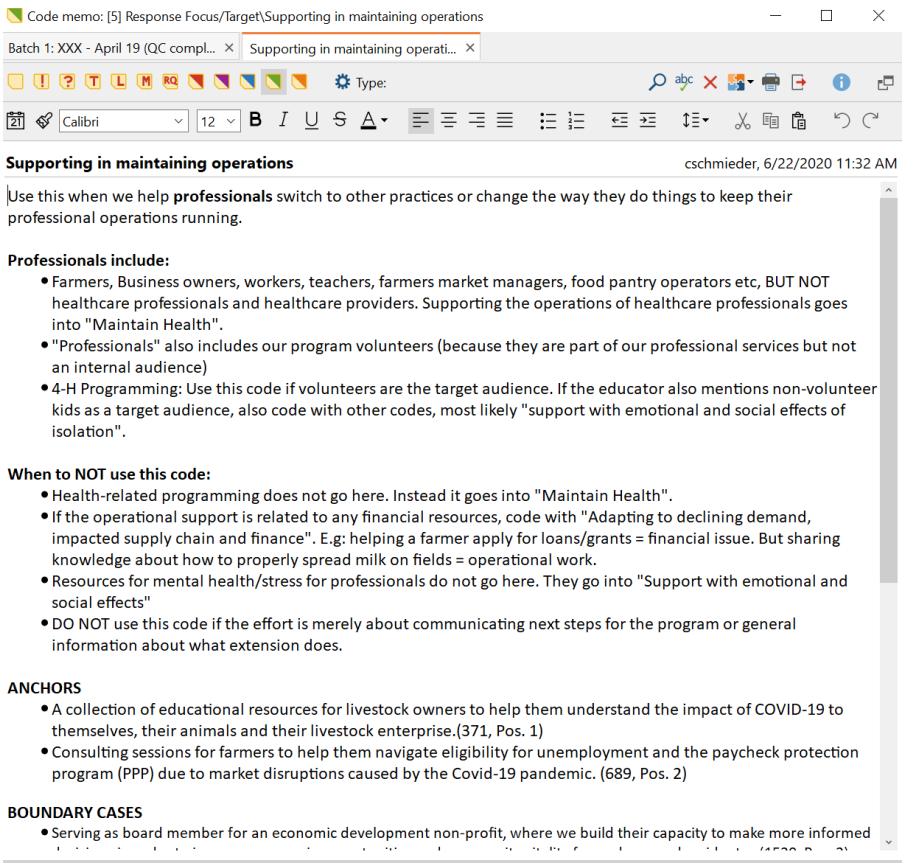

Fig 3: Use code memos to store current definitions/application: What it means, when to use it, when not to use it, and anchor examples. This is key to ensure that analysis is consistent, and that you can catch issues with conceptual understanding early and often. You can also use code memos to track analyst questions/suggestions for group meetings.

Use Code Comments & Paraphrases to Align your Team

Qualitative methods are designed to make implicit meaning-making processes explicit; to do this effectively, teams need to communicate and align their conceptual understandings. This can happen through discussions, and writing. To make these discussions as fruitful and data-centered as possible, it is helpful to have analysts explain or justify why they made certain analytic decisions. This is especially crucial in the early stages of a research project.

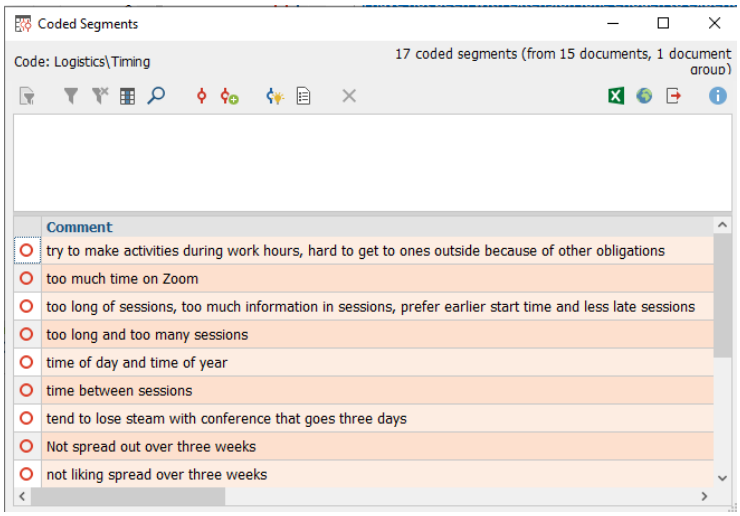

Fig 4: Instruct all team members to use code comments to briefly describe or elaborate coding decisions. You can also use code comments for documenting issues or questions. This allows the project manager to quickly assess coding consistency, issues with definitions and emerging ideas.

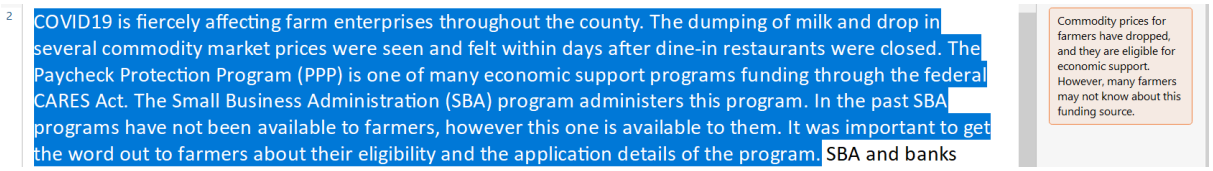

Fig 5: Similarly, you can use the paraphrase function for this purpose, especially if you have not (or do not want to) establish a formalized coding scheme.

Project Cycles

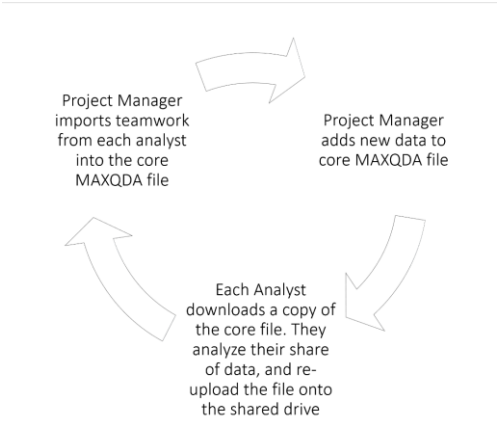

Fig 6: Teamwork should be managed in cycles, i.e. sprints of analysis that are then merged into a new project file. This can be done either manually using file sharing options that are available to you (Box, google drive etc), or via MAXQDA's TeamCloud service.

Using Teamwork import & export

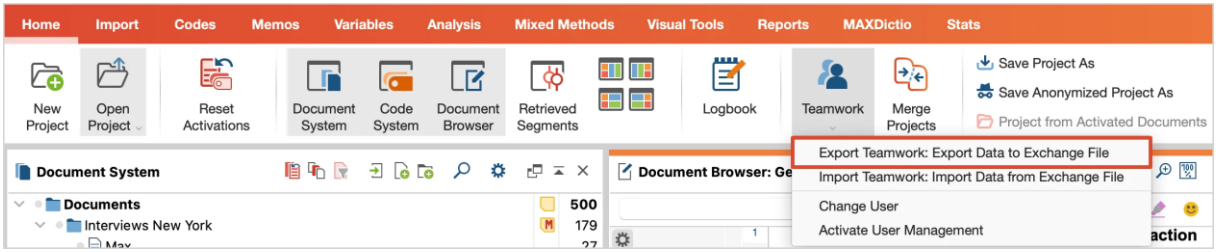

Fig 7: With teamwork export, you can merge code work, code commentaries, in-text memos, summaries and other elements from different analysts who are using the same core MAXQDA file.

Team-Cloud

Fig 8: Teamwork merge processes can also be managed through the MAXQDA TeamCloud. Here, individuals can simply upload their teamwork directly from MAXQDA, and team managers can directly import the changes into their local files.