

Collaborative Research Project Kickoff Guide

WHY IT MATTERS

Collaborative research thrives on clear communication, shared goals, and thoughtful planning—especially in interdisciplinary teams. This guide helps structure early project discussions, encouraging teams to align on priorities like roles, timelines, tools, and decision-making. While some topics may need multiple meetings, others can be resolved quickly; adapt the timing to your needs to build a strong, equitable foundation for success.

Project Setup



- What are the key research questions?
- What outputs do you expect to produce (e.g., how many papers or data products)?
- Who will take the lead for each output (e.g., should there be one leader per paper or data product, or separate leads for writing and analysis)?
- What are the major milestones and expected timeline for completing the work?
- Who are the members of the overall project leadership team (e.g., Lead PI(s), facilitators, coordinators), and what are their specific roles and responsibilities?

Project Organization & Communication



- How do you want to organize the project files? What platform will you use (e.g., Google Drive, Dropbox)?
- What communication tools will you use for quick updates versus formal messages (e.g., Slack, email)?
- How do you want to track work deliverables, and at what level of detail? Which task-tracking tools make sense (e.g., Gantt Chart, GitHub Projects, Google Sheets, Trello)?
- What platforms will you use to develop and share manuscripts and code (e.g., Google Docs, GitHub, Overleaf)?

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Data & Code Management

- What is your data management plan (see [Data Management Cheat Sheet](#)).
- What coding standards will you follow (e.g., [programming language](#), [reproducibility practices](#))?
- Which repositories will you use to share and maintain your code (e.g., [GitHub](#))?
- How will you publish your code (e.g., [Zenodo](#)) and data (e.g., [EDI](#) or other discipline-appropriate repositories)?



Publication Planning

- What authorship criteria will you follow (see [authorship cheat sheet](#))?
- What reference management tools will you use (e.g., [Zotero](#), [EndNote](#), [Mendeley](#))?
- How will you stay aware of publication opportunities and coordinate efforts?
- What is your plan for submission timelines and target journals?
- How will you plan outreach and dissemination (e.g., [presentations](#), [social media](#), [websites](#))?



Check out our list of suggested project organization platforms & tools here!