

Where do we go from here: Strategies for a midway meeting

Pleun Langerwerf and Jason Gardiner.

A PhD often moves through recognizable phases. The beginning is full of possibility and, sometimes, uninformed optimism. By the halfway point, early optimism often gives way to a more sober view of the project. That realism can be useful, but it can also bring crises of meaning, anxiety about time, and, if left unchecked, exhaustion or burnout.

In our lab, one way we try to meet this transition is with structure. We have been experimenting with protocols to address both uninformed optimism and the crises that can arise midway. Alongside regular supervision meetings, we have planned two full-day planning meetings, with one at the beginning, inspired by Pixar's "braintrust" meetings (1), and another at the midway point, which builds on the first meeting and uses other techniques to gain perspective and plan the next phase of the PhD. The aim of this midway meeting is to break the usual rhythm of supervision and create protected time for the PhD candidate and PI to step back from day-to-day work, consider the project as a whole, and make a realistic plan for the time that remains. It is not a performance review or a disguised deadline-setting exercise, but a shared opportunity to align expectations and decide what the project needs next.

How to break with your patterns: why do something different?

Walking is not essential to the protocol. It worked well for us because it changed the conversation's rhythm and created some distance from the office. Research on walking and talking suggests that movement and a less formal setting can support well-being, creativity, and open conversation(2–4). We sit face to face in an office every week to discuss the project's progress. If we had used the same setting for this meeting, we worried it would become another progress meeting, with our discussion quickly narrowing to troubleshooting details. Walking side by side helped us maintain a broader perspective. It also reduced the pressure of sustained eye contact and made it easier to discuss ideas that were still unclear.

The physical environment provided natural pauses and reference points. When the conversation became difficult, we could briefly shift our attention to our surroundings before returning to the question at hand. It helped us ask harder questions, such as whether experiments that had required substantial effort or that we really liked still made sense within the larger project.

This approach helped when we struggled to distinguish the first and second experimental chapters that, since the first meeting, had started to merge into one large story. As we walked, we discussed several possible ways to separate them. Once we agreed on an approach, we stopped and wrote it down. That pattern repeated throughout the morning: we chose a section, talked through its logic, role in the thesis, and plausibility given the time left, and recorded an option once we reached a shared understanding.

These stops mattered. They turned vague concerns into decisions that we could use in the afternoon planning session.

Then we feast: pause and food before focus.

Lunch may seem like an obvious part of a full-day meeting, but we treated it as part of the protocol. We ate separately from the rest of the group, rather than returning to the usual lunch routine.

This break gave us time to stay focused on the day's purpose and reflect on the morning's discussion. We could consider not only the decisions we had made, but also how we felt about them and how the project had developed so far. The meal marked a transition between the open, exploratory conversation of the walk and the more focused planning session that followed.

Make a workable plan: turning discussion into direction

After lunch, we map the remaining PhD. For each chapter or work package, we identify the experiments involved and decide when they should start, how long they will likely take, and when we expect their results. We account for practical constraints, including generation times, resource availability, courses, conferences, and planned breaks. We also note when an experiment should enter the agenda of our weekly meetings. This results in a mega Gantt chart that we can view and edit for the remainder of the PhD.

The morning has already established the project's logic and priorities. The afternoon therefore focuses on sequencing the work into a realistic, adaptable plan.

What did we gain?

Perception from the PI

I gained a clearer overview of the project, a better view of my PhD student's development, and a shared plan that makes our weekly meetings more productive. As PIs, we balance grant writing, teaching, and several active projects. This meeting helped me reconnect with the PhD project as a whole, rather than only with the immediate problems that needed troubleshooting.

I also gained a practical way to support my student's increasing ownership of the project. At the beginning of a PhD, I played a larger role in defining and guiding the plan. By the midpoint, I want to shift more control to the PhD candidate and support their autonomy. Developing the plan together made that shift more concrete.

Finally, the shared timeline reduced my need to set or chase deadlines repeatedly. We have already discussed and agreed on the milestones, and the PhD candidate can see what is due, when it is due, how long it will take, and how each task connects to the larger project. This freed our weekly meetings to focus on progress, obstacles, and deliberate adjustments to the plan. No plan survives first contact with the enemy, or in this case, biology, but the good thing is that we have a framework where we can see the impact of changes across the entire project.

Perception from a PhD candidate

The meeting required minimal preparation, although, in a way, the two years I had spent working on my PhD project were preparation enough. On the day itself, I made sure I was well rested and that my agenda contained nothing else.

It felt good that we both took the entire day for it; it made me feel seen and valued. It was also helpful to start outside the office, without the distractions of day-to-day work.

The structure of walking and sharing ideas felt very open. We started with general ideas, and as they became more concrete through discussion, we found a place to sit down and write them out. While we were walking, the conversation felt casual. There was no pressure to present the best idea; instead, we developed ideas together through discussion.

Having lunch together highlighted that this was a special day and something to celebrate. By not having lunch with the rest of the group, we also kept the focus on the project.

Making a concrete plan for the rest of my PhD had seemed daunting beforehand, but after that morning, everything came together quite easily. Seeing all the work laid out together also helped us space it out realistically. It can sometimes feel as though everything could or should happen at the same time, but once we divided the work logically across different periods, including other tasks, plant growth times, and holidays, creating a weekly plan became very straightforward.

After this day – or really, after these two years – I had a clear vision of what form my final thesis would take and a good idea of the work required to get there.

TLDR: protocol at a glance

Preparation is minimal – both should have a solid idea about where the project is and where they would like it to go. Keep the morning goal high-level strategy; save details for later in the day.

Guiding the walk:

Pace and path agreement: Choose a private, low-traffic loop (like a park or quiet trail) with predictable footing and benches for breaks and note-taking.

Check-in: Spend the first 5 minutes seated or standing still to set an intention, what you want to achieve while you walk.

Walk in the morning: Avoid getting bogged down by other commitments; schedule this day ahead of time and dedicate it.

Side-by-side walking: Move at a comfortable, synchronized pace, removing the pressure of direct eye contact.

Talk about what's not yet clear: the whole point is to bring up difficult things you are not sure about. Do you not believe an experiment will work? Now is the time to bring it up.

Bring a pen and notebook. Stop to take notes: Stop on a bench when the conversation reaches a conclusive point, such as when you agree on a significant workflow for a plan or goal. Get up and start on the next section when ready.

Integration of discussion:

Go for lunch: Stop moving, stand or sit together (we go for lunch), and summarize key insights or progress over the past two years, goals and motivation, and how you can support those over the next half of the PhD.

Post-lunch notes: Take a few minutes to condense your notes into a summary you can work on in the afternoon.

Get to work:

Plan the work: After lunch, go through the work packages, chapters, or whatever else you use to map out the experiments that need to happen over the next 24 months, when they should start, how long they will take, and what resources are needed. This is still a high-level overview, but the experiments needed and how they fit into a larger plan should be clear. We also included a writing plan for each manuscript and the end thesis. The goal is to align expectations and remove surprises on both sides. This essentially leaves us with a master Gantt chart.

What are the things included in the Gantt chart

- Chapters/work packages
 - o Each work package should include sets of experiments needed for completion.
 - o Include time for manuscript preparation here.
- Courses and breaks (if known)
- Milestones (papers, talks, essentially submission deadlines)

Work the plan: In following weekly meetings, reference the Gantt chart to set agenda items.

Questions to ask in following meetings

- Are we on track? If not, how do we address that,
- What experiments do we need to start?
- Which ones are finishing soon?
- Do we need to set up new experiments?
 - o If so, when is a time that we can do that so it won't overlap too much with what is already planned?
- If new holidays or breaks are scheduled, how do we balance that with the planned deadlines?

This Gantt chart structure lets you adapt and immediately see the impact of your decisions. If you change deadlines, you can evaluate how to reset them given the many other commitments. To make this easy, we use a local version of “[OpenProject](#)” software, which is designed for project organization. There are many ways to do this, so use the one you prefer.

Should you do this?

That is up to you. We found this approach useful, but we developed it specifically for our supervisory relationship and project. You may read the protocol and decide that it is not the right fit for you.

Every supervisory relationship differs, and the structure, level of planning, and timing that work well will vary. We wanted to share this protocol not as a prescription, but as another tool for your supervisory toolbox. If you have variations or other tools we can add to our toolbox, we would be happy to hear about them.

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