

# WHY HUDDLE

## HUDDLES WORK

They are an effective way to get everyone up-to-date and to identify potential roadblocks ahead. More huddles mean less emails, less unfocused hour-long meetings, less interruptions, and more flow time. Bonus: Great mechanism for on boarding new team members.

## HUDDLE OUTCOMES

When everyone is grounded, we are better able to enrich the lives of the people we serve.

When used with other team connections like one-on-ones, team meetings, and daily touch points, huddles can increase a sense of connectedness – with the work, each other, their manager, and the organization. When people feel more connected they are more engaged.

## ENGAGED EMPLOYEES

- Show up (low absenteeism)
- Stay (low turnover)
- Are more committed
- Have a higher quality of work
- Make better decisions
- Are more creative and innovative
- Have the capacity to take in more information
- More readily experiment
- Are more adaptable, resilient and change-ready



**ENGAGED EMPLOYEES CREATE HAPPY, SATISFIED, LOYAL CUSTOMERS.**

## Huddle Types

### □ Customer Focused Huddles\*

#### Customer Focused Huddles\*

These huddles focus on recent customer feedback — scores, verbatim comments, sometimes a recording of an interaction on the phone

Cadence: Daily

### □ Coordination Huddles

These huddles review what's on the calendar for that day, discuss coordination issues and help teams prepare themselves

Cadence: Daily

### □ Process Huddles

These huddles focus on discussing key performance indicators and how they are doing reaching their goals

Cadence: Weekly / Monthly

### □ Project Huddles

It's a short, stand-up meeting at the beginning of each day. Team members say what they did yesterday and what they plan to do today

Cadence: Daily

### □ Team Huddles

The purpose of these huddles is to review how the team is working together. The group can then explore issues and identify potential solutions

Cadence: Weekly / Monthly

### □ Process Huddles

These huddles are regular opportunities to hear the values, discuss them and let their leaders know when the company isn't living up to them

Cadence: Monthly

\*This guide is focused on executing customer-focused huddles, though many of the tactics can be used for other huddles too.

# HOW TO HUDDLE



## WHAT TO TALK ABOUT

Use the Yesterday, Today, Obstacles format

1. Who has an example of how they delivered a great customer experience yesterday?
2. What was a not so great experience, and why?
3. What got in the way of delivering a great customer experience yesterday?
4. Is there anything that we need to do in order for you to provide our customers an excellent experience today?

How much detail = Tell the headline, not the whole story.

Other topics of discussion (e.g., design discussions, gossip, problem solving, etc.) should be deferred until after the meeting.

Change the language in the questions to reflect your meeting cadence.

## ORDER IN WHICH TO TALK

The team should know, without intervention, who speaks first.

### Last Come, First Serve

This is a simple rule that also has the added benefit of encouraging people to be punctual about showing up for the huddle.

Downside: The last arrival is also likely to be the person who is least prepared to start off the meeting well.

### Round Robin

**In-person:** Clockwise or counter-clockwise.

**Virtual:** Down the list in WebEx or up the list.

### Popcorn

Invite someone to start and allow order to evolve. Leader should use the 20-second rule (i.e., leader does not speak for 20 seconds).