Huddles

PARTNERS IN PUBLIC INNOVATION
TOOLBOX

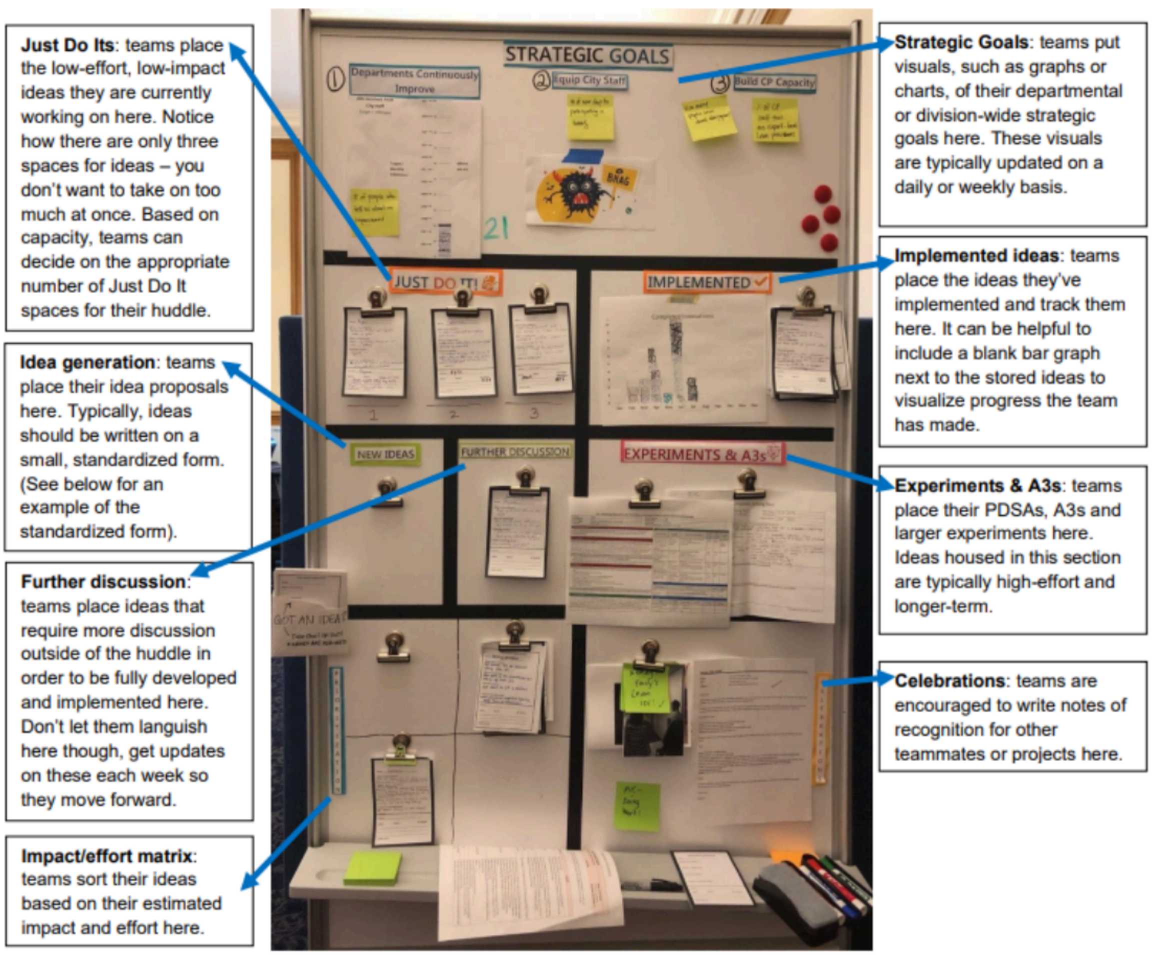
What is a huddle?

A huddle is a regular team meeting, guided by a visual management board (a "huddle board"), during which the team discusses, prioritizes, and plans to execute improvement ideas that move the needle on department or team strategic goals. Huddles typically occur daily and last ~10 minutes. Another name for the huddle is a "Daily Management System."

Huddles empower teams to think about strategic improvements on a regular basis and provide a space for teams to hold each other accountable for developing and executing improvement ideas.

What should a huddle board look like?

The visual nature of the huddle board allows teams to see at a glance whether they are making progress on their improvement goals. Huddle boards vary in composition, but they typically include space for common elements:



When should I use a huddle?

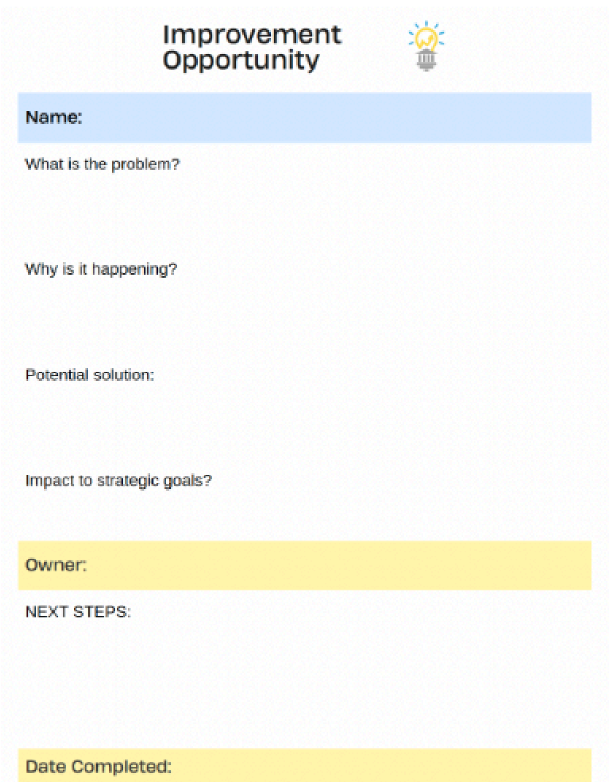
- When you want to build a culture of continuous improvement in your department or division
- When you want to hold your team and yourself accountable for implementing ideas
- When you feel like improvement ideas are discussed, but rarely implemented
- When you want to develop a space for group conversation and idea generation for improving processes in your department
- When you want to increase the visibility of your team's process improvement efforts in your department or division
- When data and performance do not appear to be the centerpiece of your process improvement conversations and you want them to be

How do I facilitate or create it?

- Create the board and place it in a frequently-trafficked area in the office. Make sure that your huddle board is in a central location where everyone must pass by it regularly – you want to make sure the huddle board is always top of mind! Use a whiteboard or butcher paper.

- Place blank Improvement Opportunity sheets and writing implements in a holder on the huddle board itself for easy access. You want to make the process of adding new ideas to the huddle board as easy as possible. Give people pens and paper right when they need it at the huddle board. Also, give your team some sheets to use on their own! (Get a printable version here)

- Choose huddle leaders: in the first few weeks of the huddle, 1-2 team members should be prepared to lead the huddle so the team can get comfortable with the format. After a few weeks, introduce new leaders. Try to ensure that every person on the team leads the huddle on a semi regular basis.



Improvement Opportunity

Name:

What is the problem?

Why is it happening?

Potential solution:

Impact to strategic goals?

Owner:

NEXT STEPS:

Date Completed:

For more information: www.publicinnovation.net

- **Host a kickoff meeting** to:
  - Explain the purpose of the huddle
  - Start generating ideas with the group and record on Improvement Opportunity sheets

- **Schedule recurring time on team members' calendars for the huddle.** Huddles can be daily or weekly depending on the team and the process you're working on. Decide what cadence is appropriate first and then schedule recurring time accordingly.

- **Use the standard work to lead the huddle and modify the board as the team gets comfortable with it.** While the standard work itself is straightforward, be on the lookout for a few common dynamics and best practices while leading the huddle:

  - **In the Work in Progress: Review JDIs Section**, teams can get bogged down in lengthy conversations about how to implement specific ideas. These discussions should not occur in your 10-minute huddle. If you find the group is spending longer than a minute hashing out the details of a task, the huddle leader should politely guide the group toward discussing the next task on the list and indicate who is responsible for picking up the conversation about the previous task outside of the huddle.

  - **In the Prioritize New Ideas Section**, don't get stuck discussing the exact placement of an idea on the impact/effort matrix. The sorting process should take less than 15 seconds with the group. We also recommend forcing ideas into one of the four quadrants; otherwise ideas tend to get lumped in the middle and are too messy to read.

  - **In the Choose New JDIs/A3s Section**, choose the oldest idea in the Low/Low area of the impact/effort matrix first, and then work clockwise around the matrix when selecting ideas. Only assign a JDI to someone if they volunteer to take on the idea.

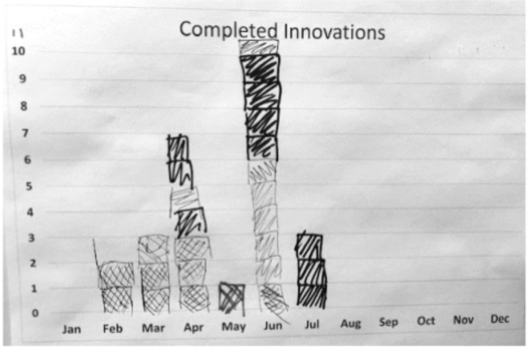
Huddle Must-Haves

Standard Work

Huddle structure should be consistent and easy to follow. In true lean spirit, create Standard Work that allows anyone to step
in and facilitate the huddle. Standard Work for the huddle should be posted on the huddle board itself. (See an example of Standard Work for a huddle that you can easily adapt for your own team here.)

Completed Improvements Visualization/Tracking

Keeping track of your progress on implementing improvements is critical to keeping the momentum of your huddle going as well as achieving your strategic goals. A simple, hand-written graph that can be completed during the huddle is best–each time someone implements an idea, draw a square in the month it was completed. See it grow over time!



Tips

- The huddle goes more smoothly if the Huddle Leader spends a few minutes with the board in advance of the meeting to:

  - Ensure that metrics are updated;
  - Familiarize themselves with the in progress ideas;
  - Determine whether space for a new JDI is likely to open up and consider which of the proposed ideas might be good to take on next; and
  - Be sure that there's at least one written celebration to be shared. (It can sometimes be hard to come up with celebrations on the spot!)

- Give everyone on the team a stack of Improvement Opportunity sheets to keep at their desks so they never miss a chance to write down a new idea!

- Make sure management is on board with the huddle prior to kickoff. An engaged manager can make or break a huddle.

- Managers should do their best not to lead huddles. Line staff should be empowered to run the show and solve problems, and managers should not serve as the idea validators in the huddle.

- The presence of managers is important to show support, but managers should refrain from speaking if possible to create space for line staff.

- Rotate the Huddle Leader so more people have a chance to engage deeply with the ideas discussed in the huddle.

- Pause for 10 seconds after asking the team to volunteer for ideas. It takes time for people to process what you're asking and think about if they want to volunteer. Be comfortable with the silence. If no one volunteers for the idea, don't do it!

- When JDI owners are providing updates on their ideas, make sure to record the date (i.e. the 'by when' section of the Improvement Opportunity sheet) they plan to give their next update.

- When first launching, make time in the huddle (usually at the end) for the team to conduct a plus-delta on the huddle itself. The plus/delta gives the team a chance to propose changes to the huddle or discuss what's going well.

- Be careful not to assign too many ideas to the same person. Try to keep track of who is working on ideas so that certain people don't get overloaded.

- Don’t fly through celebration! Leave previous celebrations up on the board as a visual reminder, but note with a checkmark those that have been acknowledged in the huddle.

  - Encourage staff to add written celebrations to the board in between huddles, but also leave some space during the huddle itself for staff to acknowledge one another spontaneously.

- Commit to the basic huddle structure for a time, then schedule a time after a couple of months to evaluate what needs to change.

- Expect that early huddles will be a little rocky and stick with the format while the team is learning – once the habits have been established, then evaluate whether changes to the structure would better suit the team.