

Time to Huddle Up.

# What are Huddles?



These daily or weekly meetings are a venue for target updates that help you stay on track to reach your goals.

## Consistent format

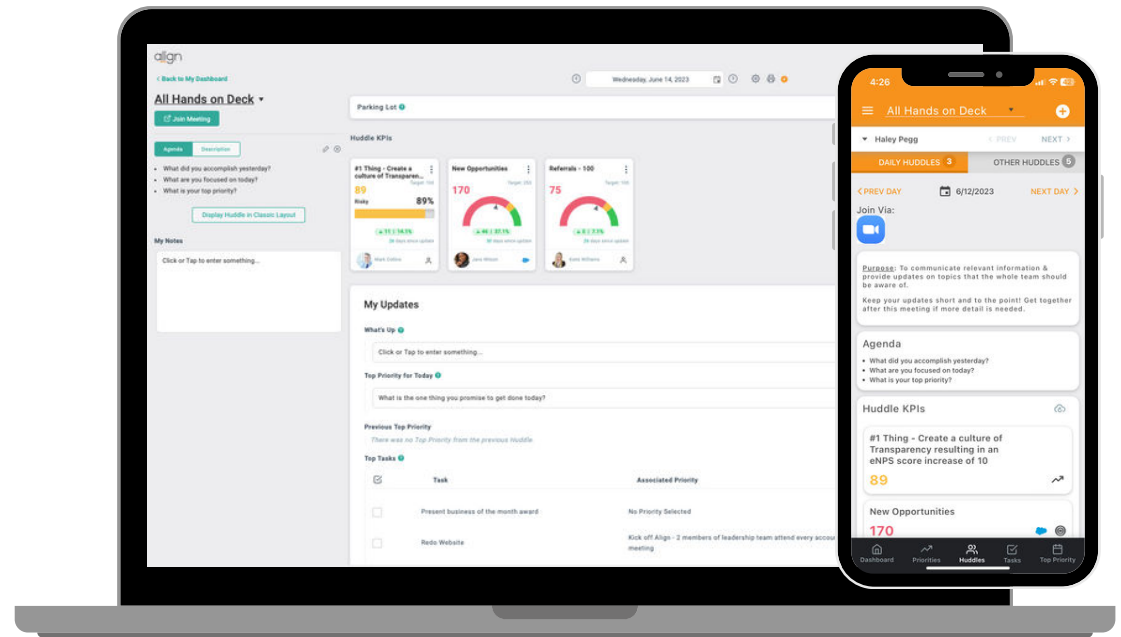
Huddles provide structure to your recurring check-ins.

## All updates in one place

Provide an opportunity for team members to ask for help, identify roadblocks, and report important trends or feedback.

## Record of updates

Keep a historical record of updates so you can revisit them anytime.





# Communicate better with huddles



## More frequent, more efficient meetings.

Reduce lengthy email chains and hours spent discussing generalized statuses every week.

It's no secret that people hate meetings. When making huddles part of your workflow, you may get some negative sentiment from employees. If you do:

- Reinforce the “why” and show the impact to reiterate how these meetings will promote efficiency.
- Huddle participation gives all team members a voice, and is a chance for an individual or team to be recognized for doing good work.
- Acknowledge the time saved with fewer interruptions throughout the day.

# Leveraging Huddles as a Leadership Team



## Advice from a CEO

**"Oh, great... Another meeting."**

This is how the team at Gootee Construction felt when the company first started implementing more meetings. But they quickly realized that setting aside 10 - 15 minutes each morning to discuss progress and roadblocks ended up saving time and increasing productivity.

"As employees saw results, they started to buy in to what we were doing, which created a positive spiral of better results. There was more buy-in specifically around communication and transparency."



Ben Gootee  
CEO, Gootee Construction

## Identify Trends

- Do two people's Huddle updates sound the same? Make sure everyone knows who owns which priority and what each other is working on. Eliminate duplicative work to ensure no time is wasted and everyone is working toward the right goals.
- Did two Customer Success Managers report the same feedback from different customers? Consistent feedback could be valuable and worth implementing.

## Close the Loop & Take Action

Once you notice the trends, it's your job to figure out the appropriate course of action.

- Did the Huddle prompt a discussion that needs to be a separate meeting?
- Who needs to be involved in the follow-up discussion?
- Is there an opportunity to create new priorities or adjust targets?

# You Set the Tone



## Transparency & Accountability Fuel Successful Huddles

*Set the tone for huddles up front so that everyone is using the same etiquette and and knows what to expect.*



### Share Accolades & Feedback

Everyone needs a little public recognition for good work. Huddles are a great forum for giving kudos.

Ask everyone to share feedback from the marketplace, customers or other departments.

Remember to keep these updates brief. If it brings up a bigger issue, address it after the huddle.



### Share Stucks

Stucks are a way to ask for help to keep priorities moving forward.

Use stucks when you are at a roadblock due to another team member. If someone else owes you a task and is holding you up, assign them a stuck as a reminder that will appear in their dashboard until it is resolved.



### Embrace Transparency

When everyone knows what's going on, you're better positioned to meet goals.

The information shared in huddles keeps all employees in the loop and eliminates a culture of secrets and backdoor meetings.

# Best Practices for Daily Huddles



## Your 15-minute daily standup to share tactical updates



### Assign an Owner

The Huddle owner ensures that the meeting starts and ends on time. They also keep the meeting from going down rabbit holes. If an issue is going back and forth too much, this person will tell the team to take it offline.



### Choose a Time

Choose a time that works best for your team and doesn't interrupt workflows.

Tip: Schedule an odd time like 11:27 or 10:16 so people are more likely to be on time!



### Invite the Right People

All team members should be in at least one daily huddle. Depending on your company size and structure, you can do full team daily huddles or break them down by department.



### Follow a Format

Keep things brief. Each update should be no longer than a minute or two. Be sure to create a dial-in link for remote staff and those in the field.

Tip: Huddles are a form of standups, so stand up! Standing during the meeting helps reinforce that it's supposed to be a quick meeting and keeps everyone focused.



### Write then Read

Ask everyone to take a few minutes before each huddle to input their updates in the software. Then during your huddle, ask them to read what they wrote to keep the meeting moving.

# Individual Huddle Responsibilities & Habits



## How to Prepare for Daily Huddles



### Set Aside 5 Minutes

Take 5 minutes at the start or end of each day to write down updates that relate to key activities or metrics that are specifically important to each day.



### What to Include

Your update should be relevant to the people in the room. It's not a to-do list.. A good daily huddle update could include positive customer feedback, accomplishments from the day before, opportunities, or stucks.



### Be Specific

Include names, dates, numbers, etc. Vagueness is detrimental to these meetings and can devalue the content of your update.



### Your Top Priority

Enter in your Top Priority for Today - the one thing you commit to do before the next huddle that will directly affect your quarterly priorities or goals. This connects your daily work to the bigger picture.





# Weekly Huddles



## Common Types of Weekly Huddles

- Departmental: 30–60 min meetings for teams to review progress on quarterly priorities and discuss one or two topics.
- Management: 60–90 min meetings for upper management or executives.
- 1:1 check-ins: 30 minute check-ins with managers and their direct reports to evaluate progress and ask for help.
- Priority-focused huddles: 30–60 minute action-oriented (often interdisciplinary) meetings made up of key stakeholders for that priority focused on making decisions and moving you closer to 100% completion of that priority.

# Best Practices for Weekly Huddles



## Your Venue to Discuss Trends or Issues Mentioned in Daily Huddles Throughout the Week



### Assign an Owner

Typically, the person who runs the team or owns the priority should own the meeting and be responsible for setting the agenda and keeping things on track.



### Set the Agenda

Prior to the meeting, the owner should solicit input for key topics to discuss this week, then share with the team so everyone can arrive prepared.



### Good News First

Take a minute to recognize positive momentum. Each member can share - what happened this past week that worked well and moved the team closer to hitting goals?



### Review & Share

Review priorities and target numbers specific to this meeting and discuss red flags brought up by gaps in progress (10 min). Share any relevant customer or employee feedback relevant to this priority (10 min).



### Discussion & Next Steps

Discuss topics and make decisions on next steps. By the close of the meeting, make sure action items and accountability are clearly defined.





# Monthly Team Huddles



## This Huddle is Customizable Based on What Fits Your Specific Organization

Since not everyone is in the priority or other weekly huddles, it's important the outcomes of those meetings are shared with everyone. The monthly huddle provides a venue for that information flow.

Your Advisor can provide a recommendation based on your specific situation.

### Common Types of Monthly Huddles:

- All-hands Huddles: Updates are shared on key decisions made throughout the month and how those decisions affect the company priorities. This is a good meeting to have if communication is an issue for your team.
- All-Hands Target Huddles.
- Management Team Huddles.