

What is a huddle?

A huddle is a regular team meeting, guided by a visual management board (a “huddle board”), in which a team discusses, prioritizes, and plans to execute improvement ideas to move the needle on department or division-wide 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. 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 composition¹, but they typically include space for common elements:

The image shows a huddle board with several sections. At the top, under 'STRATEGIC GOALS', there are three main goals: 1. Departments Continuously Improve, 2. Equip City Staff, and 3. Build CP Capacity. Below these are sections for 'JUST DO IT!', 'IMPLEMENTED', 'NEW IDEAS', 'FURTHER DISCUSSION', and 'EXPERIMENTS & A3s'. There are also sections for 'GOT AN IDEA?' and 'CELEBRATIONS'. The board is covered with various documents, charts, and sticky notes.

Just Do Its: teams place the low-effort, low-impact ideas they are currently working on here. Notice how there are only three spaces for ideas – you don’t want to take on too much at once. Based on capacity, teams can decide on the appropriate number of Just Do It spaces for their huddle.

Idea generation: teams place their idea proposals here. Typically, ideas should be written on a small, standardized form. (See below for an example of the standardized form).

Further discussion: teams place ideas that require more discussion outside of the huddle in order to be fully developed and implemented here. Don’t let them languish here though, get updates on these each week so they move forward.

Impact/effort matrix: teams sort their ideas based on their estimated impact and effort here.

Strategic Goals: teams put visuals, such as graphs or charts, of their departmental or division-wide strategic goals here. These visuals are typically updated on a daily or weekly basis.

Implemented ideas: teams place the ideas they’ve implemented and track them here. It can be helpful to include a blank bar graph next to the stored ideas to visualize progress the team has made.

Experiments & A3s: teams place their PDSAs, A3s and larger experiments here. Ideas housed in this section are typically high-effort and longer-term.

Celebrations: teams are encouraged to write notes of recognition for other teammates or projects here.

¹ This photo shows the huddle board used by City Performance’s Lean Team.

When should I use it?

- 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?

- 1) **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! You can use an extra white board or butcher paper to create the board.
- 2) **Place blank Improvement Opportunity sheets (pictured below) 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.

Improvement Opportunity		
Name: _____		
What is the problem?:		
Why is it happening?		
Potential solution:		
Impact to strategic goals?		
Owner: _____		
WHO	WHAT	BY WHEN
_____	_____	_____
—	_____	_____
—	_____	_____
—	_____	_____

Also, give your team a stack of sheets to have at their desk for easy access.

3) **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.

4) **Host a kickoff meeting to:**
 a. Explain the purpose of the huddle
 b. Start generating ideas with the group on Improvement Opportunity sheets

5) **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.

6) **Use the standard work to lead the huddle and modify the board as the team gets comfortable with it.** While the

The image on the left depicts an example Improvement Opportunity Idea sheet where idea proposals are recorded and ownership is assigned.

standard work itself is straightforward, be on the lookout for a few common dynamics and best practices while leading the huddle:

- a. **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.
- b. **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.
- c. **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.

Hints

- The huddle goes more smoothly if the huddle leader spends a few minutes with the board in advance of the meeting. Before the meeting, the leader should:
 - Ensure that metrics are updated
 - Familiarize herself 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.
 - 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 bought in to 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 which 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 in a couple 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.

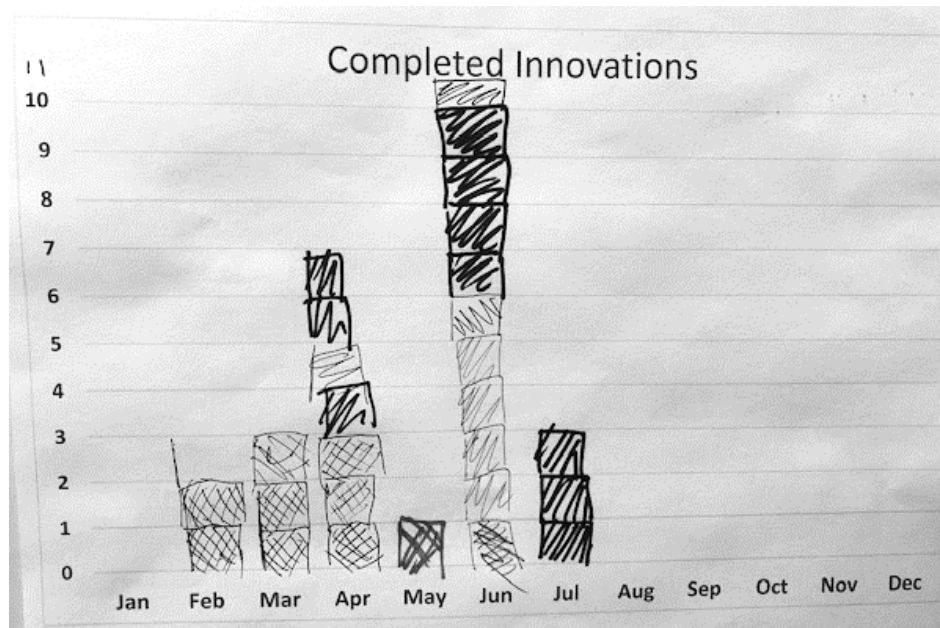
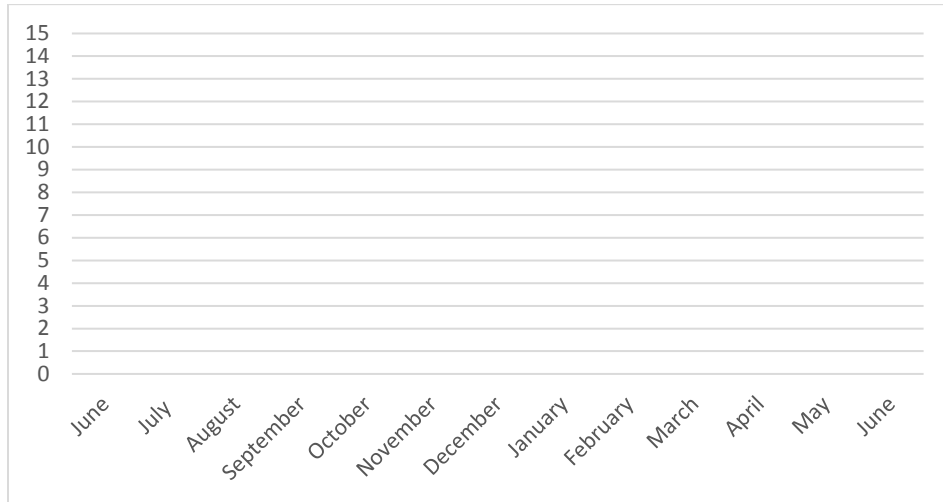
1. **Huddle Standard Work:** use this document to lead your huddles.

Weekly Huddle Board Standard Work		
For use by City Performance Lean Team and its Partners		Date: 11/14/2019 (created or last updated)
Created By: Ryan Hunter	Revised By:	Revision Number: 1

Purpose: We huddle to practice regular communication and continuous improvement. It helps us become better problem solvers and value the importance of data. This huddle board is a visual representation of these efforts.

#	Major Steps	Details
1.	Purpose	Read "Purpose" above.
2.	Work-in-progress: Review JDIs	Briefly review "Just Do Its". Any barriers to moving forward? Indicate a date in red ink when the next update on the work can be anticipated to share with the team. Continue to update the date (in red) if work is not completed. Move completed work to "Improvement Ideas implemented" and mark off on the Implemented Monthly Count Chart.
3.	Work-in-progress: Review A3s and PDSAs	Acknowledge new steps taken on A3-level and PDSA-level projects. Any barriers to moving forward? Indicate a date in red for anticipated update.
4.	Review New Ideas	Read aloud any new improvement ideas.
5.	Prioritize New Ideas	Sort new ideas into the appropriate box on the Impact/Effort matrix.
6.	Choose New JDIs / A3s	If the team has capacity to take on a new improvement idea (based on completion of a JDI or A3/PDSA project), choose an appropriate idea from the impact-effort matrix and ask for a volunteer to lead the effort. Choose the oldest idea in the Low/Low area of the matrix first, and then work clockwise around the matrix when selecting ideas. Only assign as JDI if someone volunteers. DO NOT work through the specific task and due date live in the huddle. Instead, ask the volunteer to stay for a moment after the huddle to complete this info.
7.	Update on strategic goals	Update data for strategic goals and review current plans underway to achieve the goals. " Driver title is _____ Target is _____ Actual results for this day/week/month are _____ which does/does not meet the target goal."
8.	Celebration	Read new celebration tags/notes. Ask the group if there's good work that needs to be celebrated. Accomplishments, thanks, innovations. End on a positive note.
9.	Plus-delta on huddle (temporary)	As the team launches huddles, spend 1 minute thinking about what worked well and what didn't work well on huddle board.

2. **Improvement Ideas Graph:** use this graph to track your team's progress on implementing ideas. Each time someone finishes implementing an idea, draw a square in the month when the idea was implemented to build to a bar graph over time.



This is what the graph looks like when it's filled in. Each square represents one implemented idea.

3. **Improvement Opportunity Sheet:** use these sheets on the next page for idea generation. You can print them out and cut them (produces 4 sheets/page). Hand them out to everyone on the team to keep at their desks and hang a stack of them on the huddle board for easy access.

Improvement Opportunity

Name: _____

What is the problem?:

Why is it happening?

Potential solution:

Impact to strategic goals?

Owner: _____

WHO WHAT BY WHEN

DONE DATE:

Improvement Opportunity

Name: _____

What is the problem?:

Why is it happening?

Potential solution:

Impact to strategic goals?

Owner: _____

WHO WHAT BY WHEN

DONE DATE:

Improvement Opportunity

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WHO WHAT BY WHEN

DONE DATE: