TM/TL CIMS Workshop: Introduction to Huddles

GreenLight ID #6804

Facilitator Guide

Version #1.3
Updated: June 12th, 2013

Order of Appearance

Episode Introduction 1

Role of Huddles in CIMS 3

Visual Management 6

Huddle Boards 8

Characteristics of Good Huddles 12
Video: Huddle 14

Team Leader's Role in Huddles 17

Active Team Participation in Huddles 23
Activity: Mock Huddle - Performance 24

Evaluating Huddle Issues 32
Activity: Mock Huddle – Issues/Solutions 36

Episode Reflection 39
Activity: Mock Huddle Reflection 39

Set Production

Set Production

- Print or order the Facilitator’s Guide (double-sided in color, if possible) and Sign-In Sheet.
- Read the Facilitator’s Guide and become familiar with the content and to identify station/activity setup and structure of the entire course.
- Download and view the training videos and become familiar with the content.
- Make/order copies of the participant workbook (double-sided in color, if possible).
- Set up the television or LCD projector.
- Set up a flipchart and markers.
- If available, bring a Huddle Board into the training area.
- Prepare your interactive, Sample Huddle Board in advance of the Mock Huddle Activities in this workshop.
- Make/order copies of the Huddle Process Confirmation Form on page 15 of the Participant Guide. Multiple copies will be needed for each participant as a part of the Mock Huddle Activities.
- Turn the TV off until you are ready to begin the presentation.

On Last Week's Episode

Before training this episode, the episodes below must be taught:

Episode	TM/TL Kickoff: Introduction to CIMS GreenLight ID: **6792**

In This Episode

Time	Scene	Objectives	Description
15 Minutes	**Episode Introduction**	N/A	Introduces the participant to the course, classroom rules, introductions, and breaks.
N/A	**Performance Objectives Overview**	- Explain why huddles are an important part of the Continuous Improvement Management System (CIMS). - Explain how visual management is used in huddles. - Identify the characteristics of a good huddle. - Define the role of the team leader in a huddle.	Introduce the performance objective.
20 Minutes	**Role of Huddles in CIMS**	- Explain why huddles are an important part of the Continuous Improvement Management System (CIMS).	Briefly reviews the Continuous Improvement Management System (CIMS) and the role of huddles within it
10 Minutes	**Visual Management**	- Define the concept of visual management.	Explains visual management
25 Minutes	**Huddle Boards**	- Identify the five principles of huddle boards.	Introduces the visual management of huddles through the effective use of huddle boards
60 Minutes	**Characteristics of Good Huddles** - Video: Huddles	- Identify the characteristics of a good huddle.	Outlines the characteristics of good huddles
30 Minutes	**Team Leader's Role in Huddles**	- Define the role of the team leader in a huddle.	Introduces the key areas of a team leader's role in huddles
100 Minutes	**Active Team Participation in Huddles** - Activity: Mock Huddle – Performance	- Explore ways to encourage discussion and solicit team input during huddles.	Provides guidance and strategies for urging active team participation
45 minutes	**Evaluating Huddle Issues** - Activity: Mock Huddle – Problem Solving & Generating Ideas	- Examine impact and effort factors related to the analysis of issues raised during huddles.	Highlights ways to evaluate the impact of issues and the effort to resolve issues raised during huddles
25 Minutes	**Episode Reflection** - Activity: Mock Huddle Reflection	N/A	Summarize and conclude episode

5 Hours, 30 Minutes	**Total Time**

Facilitator Checklist

Prep Items	Materials
Instructor Materials	❑ FG: CIMS_Workshop_Introduction_to_Huddles_TMTL_FG GreenLight ID: **6804** ❑ PPT: CIMS_Workshop_Introduction_to_Huddles_TMTL_PPT GreenLight ID: **6805**
Equipment and Tools	❑ Recommend grouping tables together in pods, grouping 4 to 6 participants throughout the room. ❑ Wireless remote, speakers, projector, name tents, flipchart stand and pad, markers, sticky notes ❑ If available, real Huddle Board or mock-up of huddles boards or huddle sheets.
Miscellaneous	❑ Check the training room arrangements ❑ Check equipment functionality
Participant Materials	❑ PG: CIMS_Workshop_Introduction_to_Huddles_TMTL_PG GreenLight ID:**6806**
Contacts	❑ Feedback SharePoint: http://myteams.directv.com/sites/ld/id/Lists/Curriculum%20Change%20Request%20Intake%20Form/AllItems.aspx

Activity Icons

	Classroom Activity	Classroom activities can include games, reinforcement activities, etc.
	Role-Play	Role-Plays are designed to simulate real world scenarios so CSRs can practice the computer and soft-skill behaviors necessary for success.
	Video	Videos include Sat Casts, DIRECTV ads, links to YouTube, etc.
	Energizer Activity	Use this activity to re-focus and energize the class, and set a positive tone for upcoming material.

Course Management Icons

	Section Headings and Main Topic	Used for section headings and when introducing a main topic.
	Q & A Discussion	Discussion Questions help to reinforce learning as well as explore a topic to a great level of detail.
	Tools	This icon will reference the use of any tool outside of Rio, OMS, Agent Answer Center, or RTS.
	Customer Loyalty	This icon calls out opportunities to reinforce the importance of Customer Loyalty.

15 Minutes

Episode Introduction

Show Slide # 1

Welcome Participants

Welcome

Welcome the participants to the episode.

- Welcome the participants.
- Provide a brief introduction to the episode.

Explain Ground Rules

Ground Rules

During the next two sessions, we will all need to agree to:

- Respect the air time of others
- Keep an open mind
- Remain open to the thoughts and ideas of others
- Participate and encourage others to do the same
- Ask questions
- Be mindful of time (e.g. activities, breaks)

What additional rules, if any, would you like to add to our list?

Show Slide # 2

Follow Link

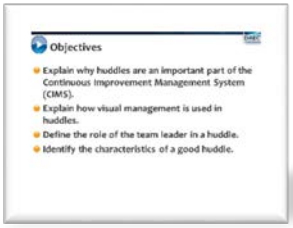
Introduction – Huddles Aspiration

We are going to be spending a few hours exploring effective team huddles. Before we begin, let's take some time to further connect with one another.

Think of one word that you want the members of your team and/or leadership to use when describing your huddles two months from now. I will give you a few moments to think of this one word.

What word did you choose? Why did you choose this word?
Answers will vary but every participant should be given the opportunity to respond. As responses are given, capture these words on a piece of flip chart paper. Then, after everyone has provided his/her word, hang the flip chart somewhere visible. You will refer back to this at the end of training.

Show Slide # 3



Explain Performance Objectives

Set performance expectations for what participants will be responsible for during this training episode.

Episode Objectives

What is an example of effective team communication?

Answers will vary but capture the answers on the whiteboard or flip chart. These answers can be compared or referred back to throughout the training.

Upon completion of the episode you will be able to:

- Explain why huddles are an important part of the Continuous Improvement Management System (CIMS).
- Explain how visual management is used in huddles.
  - Define the concept of visual management.
  - Identify the five principles of huddle boards.
- Identify the characteristics of a good huddle.
- Define the role of the team leader in a huddle.
  - Identify the three focus areas of team leader huddle preparation.
  - Explore ways to encourage discussion and solicit team input during huddles.
  - Examine impact and effort factors related to the analysis of issues raised during huddles.

Show Slide # 4

Discuss the big picture

Overview of Content

In this training session, we will take a look at the following topics:

- Role of Huddles in CIMS
- Visual Management
- Huddle Boards
- Characteristics of Good Huddles
- Team Leader’s Role in Huddles
- Active Participation in Huddles
- Evaluating Huddle Issues

Let’s being with the “Role of Huddles in CIMS.”

20 Minutes

Role of Huddles in CIMS

Show Slide # 5

Relate Points

Continuous Improvement Management System (CIMS)

What is CIMS?

As you will remember, the Continuous Improvement Management System, or CIMS, is a set of tools that works together as a system. The elements of the system work together to improve both the customer experience and operating performance.

How do Huddles work in the CIMS System?

Inside the CIMS System, Huddles act as a means of course correction and a mechanism for individual contributors to see how his/her efforts affect the whole.

Question and Answer

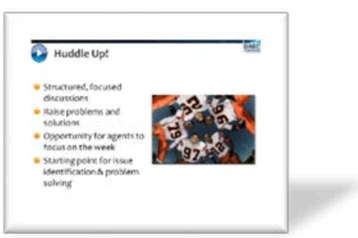
What are the 8 elements of CIMS?

Answer: WILOs, huddles, coaching, side-by-sides, issue identification and problem resolution, individual performance accountability, daily walkabouts, and process confirmation

How do you envision huddles working with the other elements of the system?

Answers will vary but should point to an understanding of CIMS as an integrated, interlocking system rather than a group of individual processes.

Show Slide # 6



Relate Points

Huddle Up!

We briefly discussed the concept of huddles in the CIMS Kickoff. What is a "huddle"?

Huddles are brief team meetings used to quickly regain focus and communicate strategy updates. Huddles are one of the 8 elements that make up CIMS and help us focus on the customer experience.

Huddles are: ***click to reveal***

- Structured, focused discussions of performance, trends, problem solving, and recognition.
- Where you raise problems and solutions based on call experience.
- An opportunity to get agents focused on the entire week, not just the last call they took.
- A starting point for all issue identification and problem solving.

All of these items encourage a culture of empowerment where the agents have a voice in identifying problems and solutions based on their experiences.

How do Huddles differ from a Pre-Shift Briefing?
Answers may vary but could include: Pre-Shift briefings have traditionally been about the Team Lead providing or reading information with very little input or interaction with the team. Huddles are more performance-focused with most of the interaction stemming from the agents.

Show Slide # 7

Relate Points

Why Huddle?

Why should we huddle? What is the benefit of huddling over the traditional pre-shift briefing? *Answers will vary, but should include: structured discussions, problem-solving, visibility of metrics, collaboration of agents, team engagement, etc.*

click slide to reveal information

Huddles enable:

- Visibility into key metrics.
- Progress to targets.
    - Referring to goals and aspirations.
- Fast response to issues.
- Focused, root-cause problem solving.
- Self-assessment and accountability for each individual's performance.
    - How does this enable self-assessment?
- Data-driven coaching and feedback of the team.
    - Focus on facts
- Collaboration on best practices to accomplish the team's performance objectives.
    - Who speaks most in the huddle? The agents! A good ration is 70% agents/30% Team Lead.
- Engagement of the team!

What stands out for you in this description of huddles?
Answers will vary but allow a few moments of discussion so that participants are able to personalize information.

Question and Answer

What is the value of providing visibility of key metrics in driving performance?
Answers will vary. Visible key metrics provides a focal point for all members of the team so that every team member is aware of and can commit to improvement.

Why is it important to track progress with goals and aspirations?
Answers will vary. Tracking progress of goals and aspirations helps to provide motivation and engagement.

How do you think huddles allow you to respond to issues faster and how does that impact your team?

Answers will vary.

How often during the day do you follow-up with your agents on performance discussions, whether it be in a huddle or 1:1?
Answers will vary but allow for a few moments of discussion. Answers should indicate and understanding of providing feedback and checking in regularly and when needed.

What are the potential benefits of huddles in terms of impacting the customer experience?
Answers will vary; Huddles allow the entire team to come together at a predictable time with a predetermined set of items that provides focus and attention to key areas. Doing so, help motivate and engage the team while driving performance improvement.

Now that we have talked a bit about huddles and their place in CIMS, let's look at the visual elements of a huddle.

Visual Management

10 Minutes

Show Slide # 8

Relate Points

The Purpose of Visual Management

What do you see?
*Different Heads Up Displays (HUDs). Each display is showing different information. *click slide to show the next image**

Now what do you see? Can you explain what is happening in the game? Who is winning? How much time is left? Can the losing team catch up?
*Other than identifying the teams each player is from, there is no other way to identify who is winning, how much time is left and if the losing team can catch up. *click slide to show the next image**

Can you answer the same questions now based on this information?
Yes. There is 12:28 left in the game. The Home team is up by 6 with 5 yards to go on the 3rd down. It is still possible for the Away team to catch up.

Thinking about these three pictures, what is visual management and why is it so important?
Answers will vary. Visual Management is a way to provide enough information "at a glance" to help maintain focus and motivation.

In CIMS, motivation is connected to individual accountability. We all want to be individually accountable to team performance. Each of us can be more accountable and do a better job when we know where our performance, as well as team performance, stands.

What do we use for visual management currently?
Answers will vary but encourage discussion on what is currently being used.

How do we communicate goals for our team?
With huddle boards, agents have a constant visual reminder of team and individual goals and aspirations.

We have boards that tell us how many calls are in queue, and we might see the average hold time. But, this is general information. We don't necessarily know how we are contributing to these numbers, and it is difficult to self-assess our own performance.

A huddle board is a tool that **tells a story** of where we are, where we came from, and where we are trying to go. It doesn't necessarily give us the whole picture in terms of what's driving the story or how we got here.

Let's take a closer look at a huddle board and ways we can share information that is relevant to team and individual agent progress and performance.

25 Minutes

Huddle Boards

Show Slide # 9

Relate Points

Enable Focused Team Huddles.

How do you currently find your team's performance?
Answers will vary but should include: Path to Success Gateway, Reports from Operational Support Specialists, Team Managers, etc.

How do you team members know their metrics, goals, and current performance?
Encourage participant responses. Answers will vary, but will most likely include: I tell them, they ask me, Gateway, etc.

How do they know compared to the rest of the team?
Answers will vary, but will most likely include: Agents generally won't know unless the team is pretty open about stats.

How does that facilitate collaboration and foster teamwork?
Answers will vary; It doesn't. Keeping information hidden fosters an environment of individualism instead of collaboration and teamwork.

If this is the case, how does that encourage continuous improvement of the customer experience?
Answers will vary: Again, it doesn't.

When you look at this slide, what do you see?
Answers will vary.

What if your team goals, your team progress toward those goals, and each individual's contributions toward the team progress were visible? In what ways would this affect your conversations about how the team works together toward the goals?
Answers will vary, but should include: I can help drive performance by encouraging teamwork, recognizing top performers, urging self-assessment of performance and personal accountability to the team, pinpointing areas where team performance needs improvement, etc.

Huddle boards are the ideal place to share your team aspirations. Aspirations are reset by team performance and are based on where you are today as a team and where you can be in a month. This may or may not be the gateway goal, as such.

An aspiration should be a stretch that challenges the team and is realistic, yet doesn't discourage your agents because it is too much of a stretch.

What is the benefit of having your aspirations posted everyday?
Answers will vary

It is important to ensure that you are holding agents accountable for individual performance goals, which are based off of team aspirations and are realistic to their skill sets and knowledge.

How could sharing and posting team goals help drive performance?
Encourage participant responses. Examples may include: encourage competition and teamwork, foster self-assessment of performance toward team goals, help agents be personally accountable to the team, etc.

Show Slide # 10

Relate Points

Principles of Huddle Boards

Effective huddle boards adhere to 5 main principles:

1. Accessible – Located near where the team works.
    a. Why should this be accessible or close to the team? *So they can see it all of the time. If the huddle is missed, the agent can still obtain the information.*
2. Clear – Simple display that clearly indicates metrics.
    a. This is a great vehicle to keep up to date on metrics and is easy to understand
    b. It's also a tool to help you, the Team Lead, manage your WILO as you won't have to spend as much time answering performance questions.
    c. Lastly, if you are unable to complete your team's huddle, it is easy for someone to step in and know what is going on.
3. Target-driven – metric displayed against a target with a trend history (e.g., one week).
    a. This enables focus management.
    b. What do you see on the board? *Answers should include: The focus metrics, main theme of the week, Goals and Aspirations, Colors (green/red) on metrics with directional arrows.*
4. Balanced – Metrics selected are a balance of results and drivers.
    a. The result is NPS
    b. Drivers are metrics like transfers, callbacks, claims, etc.

5. Controllable – Metrics selected can be influenced within the reporting cycle by the team.
    a. Don't put something on the board that the agents have no control over.

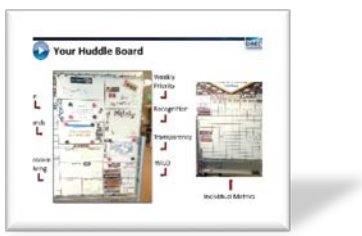
Remember, these five items speak to the performance aspect of the board.

Question and Answer

What stands out for you in the five principles? Why?
Answers will vary, but may include: anyone (agents, leaders, etc.) can see it at anytime and have an idea of what's going on, huddle boards are a tool to position information, etc.

The purpose of a huddle board is to help explain, enhance, and focus your discussions with your team. It is meant to paint a clearer picture.

Show Slide # 11



Relate Points

Your Huddle Board

Your huddle board will contain the following sections:

- Individual Metrics
    - This takes up half of the board. It's great to know what's going on but your focus should be on what you are going to do about it.
- Trends
    - This helps with individual accountability, focus management, and setting appropriate aspirations for the week.
- Problem Solving
- Weekly Priority/Theme
- Recognition
- Transparency
- WILO
- Fun

In addition, it may be helpful to note:

1. Black/Blue whiteboard marker colors are for section titles and names.
2. Red/Green whiteboard marker colors are used in relation to meeting goals and aspirations.
3. Hanging folder for different forms
4. Plenty of Post-It notes for "sticky movement"

Take note that this board adheres to the five principles we just talked about. It is relevant and easy to use.

While there are predefined areas and types of information on your board, your team should make it their own! Notice how this huddle board has the standard sections, but has been customized with the Las Vegas theme and additional sections like the fun "Quote of the Day." Your board should reflect the personality of your team. After all, it is their board.

Do you notice the red and green numbers on the huddle board? The red numbers reflect aspirations of the team – they do not necessarily indicate gateway goals have not been met. Red doesn’t always mean something is negative. It shows how the team is performing against the aspiration that was originally set and agreed upon. It is a visual way of saying that we have work to do as team. Make sure that your team’s aspirations match with your TM’s aspirations for the team.

The green numbers mean the individual agents and/or the team as a whole has hit the aspiration. Once everyone on the team is in green, the aspiration may change.

Visual management of your huddles, through the use of huddle boards, should focus and enhance your discussions. Huddle board content should guide you in talking about issues and ideas to help drive performance.

30 Minutes

Characteristics of Good Huddles

Show Slide # 12

Relate Points

What are Good Team Huddles?

We have covered quite a bit of information regarding huddles. Let's take a moment to recap what huddles and huddle boards are and are not.

click slide to reveal images

Based on some of these images, what are some of the characteristics of a good huddle?

Answers will vary but may include: fun, meaningful, focused, actionable, engaging, etc.

What Huddles are:

- Huddles are crisp, well-prepared, and tightly managed brief meetings to maintain focus and drive.
- Huddles are filled with high energy with lots of positive reinforcement.
- Huddles are a celebration of team and individual successes, big and small.
- Huddles are future-focused.
- A huddle is a tool to:
    - Provide coaching and/or feedback to the team. Be sure to use your Coaching and Leadership Essentials (CLE) tools, such as the coaching conversation model, the CAIR/HUBS models, etc., when providing coaching and feedback.
    - Optimize performance through self-assessment of individual agents and the team as a whole.
    - Enhance communication within the team.
    - Establish daily game plan.
    - Review improvement opportunities.
    - Communicate and implement change more rapidly.
    - Promote empowerment and engagement.

click slide to reveal images

Based on some of the images you see now, what do we not want a huddle to be?

Answers will vary but may include: time to discipline in public, complaint session, unfocused, training session

What Huddles are not:

- A replacement for general meetings. These meetings should still occur as they are integral in your team's culture.
- A replacement for formal training. Huddles are to maintain focus and drive not teach/train anything new.
- A tool for individual coaching. Huddles are group focused. Use one-on-one development time or side-by-sides for coaching.
- An opportunity to call out or embarrass specific individuals for poor performance. Be sensitive to members of your team. While it's best to reward/praise publically, it's never, under any circumstances, acceptable to single out a team member publically for poor performance.
- A free-for-all gripe session. Rampant negative attitudes are contagious and can infect the entire team. Instead, focus on using process improvements.
- A forum for unstructured brainstorming. Remember, the goal of a huddle is to be quick and focused. If you need to perform brainstorming with your team, this may be better suited to a team meeting.
- A tool for in-depth problem-solving. As discussed previously, a huddle does not provide enough time for this activity. Use a team meeting or one-on-one coaching session instead.

To help you conduct effective, efficient huddles with your team, your huddles will be observed by Change Agents. You will receive coaching and/or feedback based on these observations via the Huddle Process Confirmation form.

What are the differences you see between pre-shift briefings and huddles?

Answers will vary.

Show Slide # 13

Show how huddles work

How Huddles Work

Now that we understand why Team Huddles are important and what part they play in the CIMS process, let's look at how they will actually work and what your roles will be.

- Huddles will be conducted near the beginning of each shift (and later as well, if beneficial)
- They will occur each day and last about 15 minutes
- Who should attend:
  - All team members in the team
  - Any other personnel directly involved in day-to-day operations
- The huddles will take place at the team's performance board
- They will be led by your team leader or another designated agent

click to display points on slide

The agenda for the daily huddle will generally follow this outline:

1) How are we performing? (3-5 minutes)
   - Provide praise for targets achieved or exceeded
   - Review performance from yesterday
   - Review performance trends over the last week/month
   - Highlight performance gaps requiring further discussion
2) How do we achieve goals/targets today? (3-5 minutes)
   - Review any news that may affect the day's schedule or work content
   - Discuss and set targets as a team
   - Assign people to work queues
   - Provide encouragement
3) How can we improve moving forward? (5-10 minutes)
   - Discuss drivers of performance gaps
   - Identify and prioritize issues to be problem solved. Agents can bring issues up, write them down on Post-it notes, and they can be addressed immediately or in future huddles.
   - Review status of priority problem solving efforts
4) After the huddle is done, team lead notes any items that need follow-up in a "parking lot" list

Next, we will watch a short video that illustrates how a typical team huddle should work.

30 Minutes

Video: Huddle

Show Slide # 14

Video Overview

Participants have a copy of this overview on page 7 of the Participant Guide.

Video Overview

- This video depicts a team engaged in an excellent example of a huddle.
- Video length is approximately 11 minutes.
- Locate the Huddle Process Confirmation Form on page 12 of the Participant Guide and review the sections. This form captures some of the key elements and characteristics of a good huddle. Participants will use this form at the end of the video to evaluate the huddle.
    - As a guide while rating the huddle:
      1 = train wreck
      3 = average
      5 = best ever

Access Video

Access Video

To access this video:

Agent Answer Center > Online Learning > Team Leader Material > TL-CIMS > TL-CIMS > CIMS Huddle > CIMS_Huddle

Debrief Video

As facilitator, you should use the CLE Coaching Model to debrief the huddle. Support and build, explore, and redirect as needed. Be sure to use advanced responses when the participants accurately self-assess. Always close the debrief by summarizing and supporting.

Debrief Video

Did you notice that this team spent a lot of time on problem-solving? While a huddle is an excellent place to address problem-solving, you will most likely not spend as much time problem-solving <u>when you first begin to huddle</u> with your team. Not to worry! You will build up to it.

How did the huddle in the video look different than your current pre-shift briefing?
Answers will vary but should include: more focused, included visuals, highlighted metrics, actively engaged agents, etc.

Based on your observation of what makes an effective huddle, what went well?
Answers will vary but allow a few moments for discussion and sharing of observations.

What would you do differently and why?
Answers will vary but allow a few moments for discussion and sharing of observations.

Where did you see examples of self-assessment and accountability in this huddle?
Answers will vary, but may include: agent's comment on using the customer's name and his name during the call; agent's acknowledgement of a high credits metric and his desire to do a side-by-side to better his credits metric, etc.

Look at the Huddle Process Confirmation Form in your Participant Guide. Based on the form, how would you evaluate the huddle? Let's go through each of the sections on the form and discuss your feedback.
Answers will vary. Allow ample time for discussion of each section.

We will talk about the Huddle Process Confirmation Form in greater depth later in this session, so don't let it stray too far from your mind!

Please share any additional thoughts or observations you have about the huddle we just witnessed.
Encourage participant responses.

Now that we've seen a huddle in action, let's explore how the team leader designs, prepares for, and guides the team's interaction during the huddle.

30 Minutes

Team Leader's Role in Huddles

Show Slide # 15

Relate Points

Team Leader's Role Defined

What are some best practices going on right now in your teams?
Answers will vary.

Your role as a Team Leader in the Huddle includes three key areas: Preparation, Delivery, and Wrap-up/Debrief. Each part is essential in creating and conducting effective huddles. Let's take a brief look at each.

Team Leader Preparation includes:

- Update boards with previous day's metrics
- Review key daily/weekly metrics
- Determine daily agenda and desired outcomes
- Prepare questions to drive discussion

We will explore preparing for a huddle in more depth in just a moment.

Delivery includes:

- Lead team in daily huddle agenda
- Solicit input from frontline agents
- Provide recognition to team and/or individuals for achievements
- Follow up on any outstanding items – the team should recognize that you are listening and responding to their ideas

Wrap-up and Debrief Includes:

- Send off agents with an action plan for the day
- Review what went well and what opportunities need improvement
- Set goals for the next huddle
- Follow up with frontline agents during weekly one-on-one sessions

Don't forget, your WILO should reflect the time you take for Huddle Prep, Huddle, and Huddle Debrief.

Question and Answer

How much time might you need to prepare? Why?
Answers will vary.

What are some things you can include in your prep?
Answers will vary, but may include: giving agents assignments for next the huddle, etc.

How does wrap-up and debrief help the huddles?
Answers will vary, but may include: makes sure everyone walks away on the same page, etc.

Show Slide # 16

Relate Points

The Change Teams at your location can help identify dilemmas and solutions related to the preparation and delivery of huddles. As facilitator, you may wish to speak with Change Agents ahead of this workshop to help address potential questions from participants.

Areas of Huddle Preparation

Team Leaders must prepare for each daily huddle to ensure success.

Why is that?
Answers will vary but should include: deliberate execution, credibility, etc.

When it comes to preparing for your huddle, there are three areas you will want to focus in order to provide the greatest impact in the shortest amount of time: Logistics, Rules, and Attendees. Let's take a closer look at each one.

1. **Meeting Logistics**
   a. First, it's important to establish a regular day, time, and place for the huddle meeting to take place. For example: Monday at 4pm around the board. Keep in mind that timing of the meeting will need to be coordinated with REM.
   b. Be strict about keeping to the planned schedule of meetings.
   c. Until the meetings are well established, remind your agents beforehand where and when to meet.
   d. Make sure that the huddle board is updated and that the agenda is set prior to huddle time.

What if the huddle is scheduled at a time other than the start of the shift, and an agent is on a call? What should you do? This is when visual management of the huddle via the huddle board becomes so important. Keeping the board updated with relevant information from the huddle, including actions the team agreed to, allows agents who missed part or all of a huddle to look at the board to get an idea of what was discussed. Also, agents must be individual accountable for following up on the information discussed during a missed huddle. They should consult the huddle board, as well as talk with team members who participated in the huddle.

What happens if you are out of the office due to PTO or illness? It's important to have a Plan B since your agents will come to rely on the consistency of the huddle and look forward to them. Your Team Manager may be able to fill-in for you, or you may feel comfortable having a high performing agent step in. Think through possible solutions to this sort of dilemma as you plan for your huddles.

2. **Meeting Rules**
    a. The Huddles must start on time, every time.
    b. Since huddles are so short and crucial information needs to be communicated, no time wasting. Everyone must be focused to ensure effective use of time.
    c. No emails or phone calls; mobile phones, laptops switched off. This rule is for everyone attending the huddle, even you, the Team Leader.
    d. Provide visual charts with performance and clear targets on the huddle board.
    e. And lastly, the data used is up-to-date and timely. Nothing is more distracting than out of date information.

3. **Attendees**
    a. Everyone should have clearly defined roles and responsibilities. Use this as an opportunity to get your team engaged in the huddle. You may want to have some individuals lead different parts of the huddle. Being the huddle leader doesn't mean you have to literally lead the entire meeting! Don't delegate key aspects of the huddle until agents know what a "good" huddle is. Get good and show them what it looks like before assigning roles and responsibilities.
    b. Your frontline agents to attend shift/queue huddles.

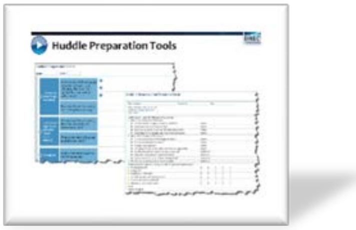
Question and Answer

What stands out for you in terms of preparation for a huddle?
Answers will vary, but allow for a few participants to provide answers.

What changes will you need to make to how you prepare for team meetings? Why?
Answers will vary, but allow for a few participants to provide answers.

How does each of the areas of huddle preparation (meeting logistics, meeting rules, and attendees) impact your ability to be deliberate in facilitating an effective/impactful huddle? *Answers will vary: Everyone knows what to expect and when, eliminating distracting surprises while encouraging "buy in."*

Show Slide # 17



Relate Points

This sheet is located on page 14 of the Participant Guide.

Huddle Preparation Tools

Preparing for a huddle is just the first step. To set you on that path, you have been provided some tools in your Participant Guide to help you prep and consider the effective components of a huddle.

The Huddle Preparation Sheet is a template to use for your huddle prep.
Note the sections of the form. While the form does not represent the ultimate preparation for a huddle, it is a tool to help you to begin thinking about the topics you want to focus on during your huddle. Think about how you're going to encourage agents to participate and the actions you want them to take away from the huddle.

You can begin a new Huddle Preparation Sheet as soon as a huddle is complete to make notes on the things you want to add for your next huddle. Always jot these ideas down while they are still fresh in your mind!

Notice that the Huddle Preparation form aligns with some of the concepts from Coaching and Leadership Essentials (CLE), such as reinforcing things going well, following up, leveraging talent on team, narrowly focusing on a few items versus several, etc.

The Huddle Process Confirmation form is a form to provide coaching and/or feedback on a huddle.
Getting good at anything takes practice and, often, a good coach to give us feedback. As we saw during the huddle video, this form captures some of the key elements and characteristics of a good huddle. Take a moment to review the form again. These elements are valuable to consider when planning your huddle.

This form is located on page 15 of the Participant Guide

As we noted earlier, your huddles will be observed by Change Agents who will provide coaching and/or feedback using this form. As you are observed in the first few weeks, the numerical rating will not be the focus. We want Team Leaders to focus on getting a few huddles under their belts and on the feedback provided. We will begin to look at the numbers more as we progress to see if Team Leaders are trending in the right direction. After a few weeks, the Change Agents, in collaboration with the team, will decide the readiness of the team to add the numerical ratings component into the observation process. Ratings of 4 and 5 should be a goal within several months.

After the observation, completed forms will stay at the huddle board for one month to ensure that the suggestions and coaching are acted on. Previous forms can be reviewed to look for trends and to promote Team Leader/Team Manager self-assessment. At approximately the one month mark, forms are catalogued and kept by the Team Manager for review with the Change Team for progress made and successes achieved.

You might also consider asking agents to fill out the form occasionally as a part of process confirmation. This could be done verbally by the team or during 1:1s with some of your higher performing agents to provide them with the opportunity to assume a leadership role in process confirming.

As you can see, this is a valuable instrument with multiple uses – preparation, process confirmation, self-assessment, team engagement, etc.

You now have the knowledge and tools to arrange an outstanding huddle. But, what if your team is hesitant to join in the discussion? Without the participation of your agents, your huddle won't be as effective. Let's take a look at how to encourage participation.

25 Minutes

Active Team Participation in Huddles

Show Slide # 18

Relate Points

Encourage Discussion and Solicit Input

Think about your team for a moment. Who will and who won't want to participate in the huddle? Why won't some participate?

How can you draw participation out of the whole team? *Answers will vary but encourage more than a one word answer.*

During the delivery of the huddle, you, as the Team Leader, will encourage discussion and solicit input from the team.

To encourage participation and solicit input, you can either challenge the group's thinking or guide the process. Let's take a look at each.

Challenge the Group's Thinking

- Recap what's been said and check for other interpretations
- Link comments back to the huddle's goals or agenda
- Make reality checks
- Help the group when it gets stuck

Guide the Process

- Identify issues for further discussion
- Create agendas for future meetings so the group can move on
- Monitor participation and involve reluctant employees by inviting their suggestions

How can CLE concepts be used to challenge the group's thinking and to guide discussion?
Answers will vary, but should include: coaching conversation model for questions on what went well/do differently, advanced responses (support/build, redirect, exploring); no but's rule, asking questions to promote self-assessment, etc.

Show Slide # 19

Relate Points

Prompts for Guiding a Huddle

Having some prompts and phrases in mind before a huddle can help you engage your team and steer the conversion.

How can you challenge your group's thinking in a huddle? What are some examples?
*Answers will vary; *click to reveal some example statements* "So what you're saying is . . .", "What do you think, Anne?", "Is it realistic to achieve that within the timeframe?", "Suppose we did it this way…what would happen?", "Another company does this…would that work here?"*

How can you guide the conversation back to a point? What are some examples?
*Answers will vary; *click to some example statements* "That's an interesting point and I would like to get a better understanding of how it fits in with the issue…" "We agreed to spend 10 minutes on this and it's already been 15. Let's move on, but remember we can use the huddle board to record remaining issues and questions…"*

How can you encourage participation? What are some examples?
*Answers will vary; *click to reveal answers* "It's gone very quiet. Is everyone lost or do you just want some time to think?", "Does anyone who hasn't spoken want to comment? John, what do you think about…?"*

How can you possibly discourage participation and not realize it?
Answers will vary; not providing enough time for reflection and answer after asking a question to the group, not providing encouragement or positive recognition, not asking questions, allowing a few "louder" agents speak for the entire team, word choice, tone of voice, body language, etc.

Now that we have talked a bit about how to conduct a huddle, let's practice with an activity. There are two key segments of a huddle: where we talk about performance and where we talk about ways we can continue to improve (which we sometimes call problem solving). First, let's practice a huddle focused on performance.

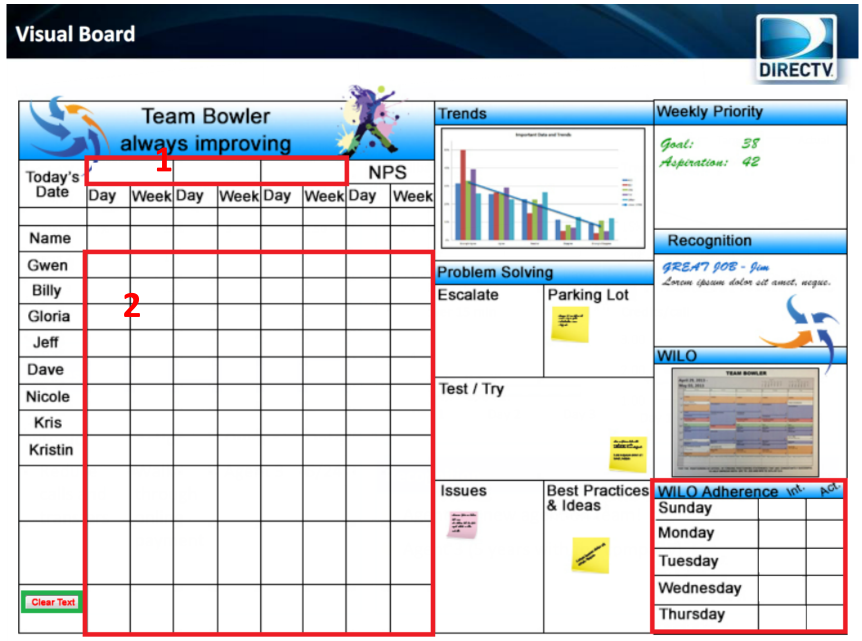
1 Hour, 15 Minutes

Activity: Mock Huddle - Performance

Show Slide # 20

Follow Link

Click the image on this slide in the PowerPoint to open the interactive Huddle Board.



**As facilitator, you should work with your local Change Team to obtain relevant metrics/data as a focus for this activity. Then, prepare your interactive Huddle Board before the activity/workshop.*

Once you have your metrics/data, click the image on the PowerPoint slide to open the interactive Huddle Board. You can type your metrics/data into the individual fields in the areas highlighted above in red and labeled 1, 2, and 3. Area 1 allows you to enter the metric label (i.e., Callbacks) and areas 2 and 3 allow you to enter the numbers. You may clear the entire board of information you've entered by clicking the Clear Text button, highlighted above in green and labeled 4.

*After you have entered the metrics/data, you may wish to capture a screen shot of the completed board and paste that image onto a slide in a new PowerPoint. Save this PowerPoint to the desired location to be used in future training sessions. This will keep you from having to enter the metrics/data for every training session. Simply open the saved PowerPoint with the completed board rather than opening the interactive board and entering information again.**

Introduce Activity

Activity Overview

- In this activity, you will have an opportunity to witness and/or conduct a mock huddle focusing on performance.
- If you are not presenting or acting as an agent in the mock huddle, you will be coaching and/or providing feedback after the presentation. You are encouraged to use the coaching conversation model in-the-moment to debrief the huddle and promote self-assessment.

Conduct Activity

This activity is located on page 11 of the Participant Guide.

You may wish to ask a Change Agent to walk participants through the Huddle Preparation Sheet and answer any questions they may have.

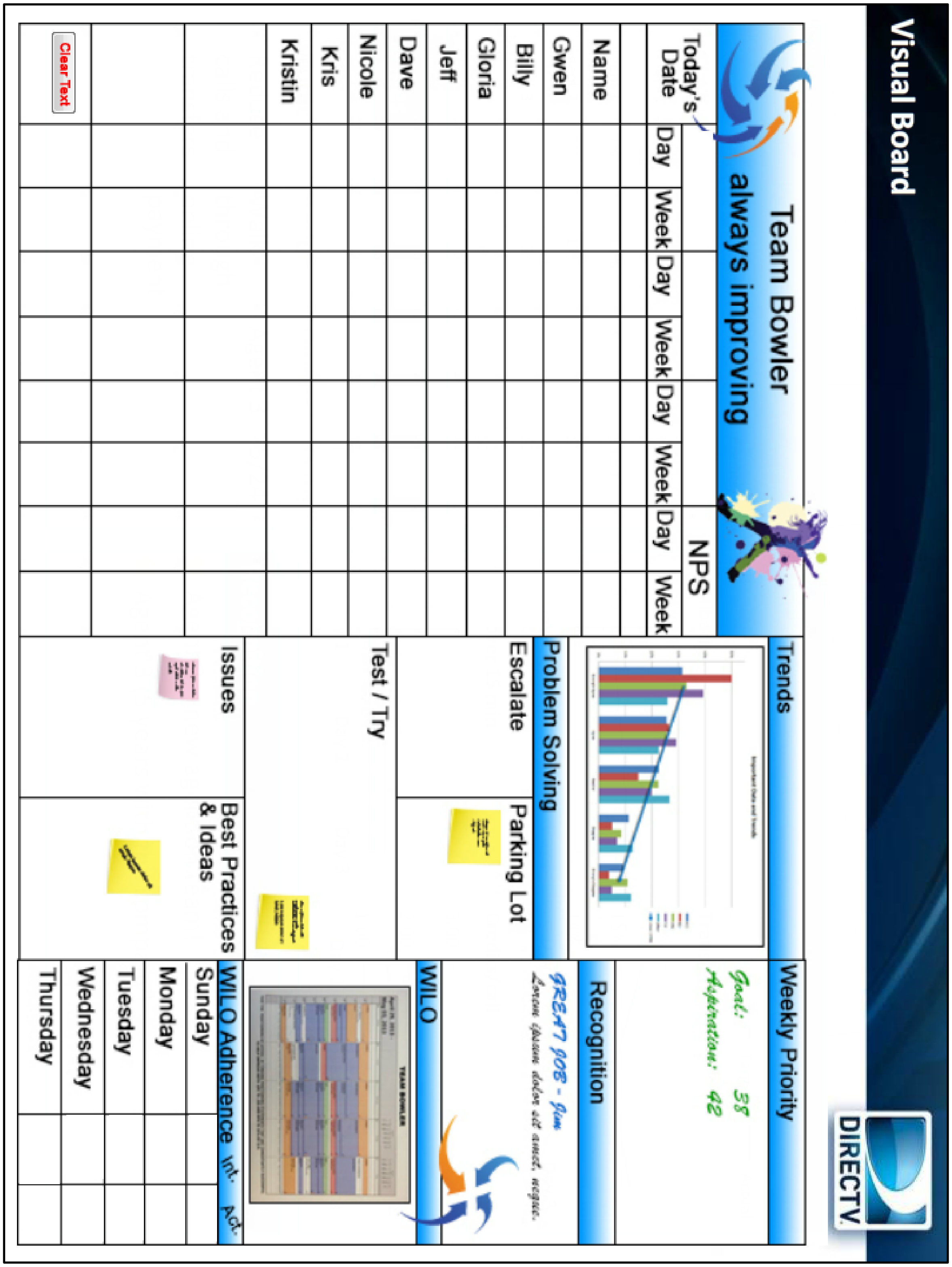
Directions

- Hand out blank copies of the Huddle Process Confirmation Form. (The copy in the Participant Guide was filled out during the video activity.)
- Break the class into roughly equal teams, not exceeding 8 participants per team.
- Each team will be given 10-15 minutes to prep for a mock huddle presentation using **<u>Section 1</u>** of the Huddle Preparation Sheet in the Participant Guide and the Sample Huddle Board presented by the facilitator of this training. A blank, hard copy of the Sample Huddle board is available in the Participant Guide. The prep should be completed by the team as a whole, with all participants contributing and each participant filling out his/her own Huddle Preparation Sheet.
- Participants should pay close attention to the metrics/data on the Sample Huddle Board as they plan their mock huddle in order to address possible performance issues.
- Each huddle should be planned for no more than 10 minutes with a 5 minute discussion period at the end.
  - Encourage participants to ask open-ended questions to open discussion and close-ended questions to narrow discussion.
  - Remind participants to set the tone for the huddle by referencing the take-aways and aspirations from the last huddle.
    - "Yesterday, we agreed we would try . . . "
    - "In our last huddle, we set the aspiration of . . ."
- Ask one team to volunteer to demonstrate their planned huddle. The team will choose a leader, and the rest of the team will act as agents.
- Participants on the team not presenting should be filling out

the Huddle Process Confirmation Form to provide feedback for the Team Leader presenting.

- After each huddle, the observing participants should provide feedback on what went well and what can be done differently to the presenting Team Leader. Remember to use the coaching conversation model!
- Have different volunteers conduct as many mock huddles as time permits (typically 2-3 mock huddles total). Be sure to supply enough Huddle Process Confirmation Forms so that each participant has one for every presenter.

Sample Huddle Board



Huddle Preparation Sheet

Date: ____________ Shift: ____________

① How are we performing? (3-5 mins)	What are the 2-3 things <u>we are doing well</u> and <u>want to do differently</u> that I want to highlight from yesterday's performance?	1 ______ 2 ______ 3 ______
	How have the solutions we've been testing been working?	
② How can we improve on our Team Goals? (5-10 minutes)	Who do I want to call upon to share best practices and performance gaps?	
	What do we need to focus on to achieve our goals?	
③ Parking lot	What are the items I want to note for follow-up?	

Huddle Process Confirmation Form

Observer name ____________ Team Lead ____________ Date ____________

What solutions came out of the huddle for driving toward our Team Goals?

Huddle format – Were the following items covered?					
How are we performing (3-5 minutes)					
• Provide praise for targets achieved or exceeded?	Yes/No				
• Review performance from yesterday?	Yes/No				
• Review performance trends over the last week/month?	Yes/No				
• Highlight performance gaps requiring further discussion?	Yes/No				
Game plan for today (10-15 minutes)					
• Discuss drivers of performance gaps as a team?	Yes/No				
• Discuss and set targets as a team?	Yes/No				
• Provide encouragement?	Yes/No				
• Ask high performers to share best practices on target areas?	Yes/No				
• Identify and prioritize issues to be problem solved?	Yes/No/NA				
• Note new initiatives and issues on the board?	Yes/No/NA				
• Review status of priority problem solving efforts?	Yes/No/NA				
Were follow-up items noted on the parking lot?	Yes/No/NA				
Huddle execution (rate on a scale of 1-5 with "5" being the highest score)					
Preparedness of TL	1	2	3	4	5
Energy of TL	1	2	3	4	5
Engagement of the team	1	2	3	4	5
Ability to stick to huddle format & time	1	2	3	4	5
Was huddle dynamic and fresh?	1	2	3	4	5
Overall execution of the huddle	1	2	3	4	5

Notes ____________

Positive feedback ____________

Opportunities for improvement ____________

Debrief Exercise

As facilitator, you should use the CLE Coaching Model to debrief the huddle. Support and build, explore, and redirect as needed. Be sure to use advanced responses when the participants accurately self-assess. Always close the debrief by summarizing and supporting.

Debrief

When debriefing this mock huddle with the Team Leader and "agents" who presented, remember to use the coaching conversation model!

- **What went well during the mock huddle(s)?**

  Answers will vary but allow for a few moments of discussion and sharing.

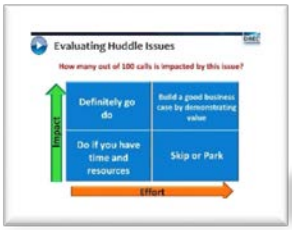
- **What would you do differently in your huddles when you return to your agents and why?**

  Answers will vary but allow for a few moments of discussion and sharing.

20 Minutes

Evaluating Huddle Issues

Show Slide # 21



Relate Points

Evaluating Impact of Issues in a Huddle

When your team is actively participating in a huddle, agents may raise issues based on their experiences and observations.

When agents present issues during a huddle, it is an opportunity to leverage the DIRECTV employees closest to the customer to identify how we can improve the customer experience. By listening to agents' issues and addressing them in a logical manner, the huddle conversation drives better performance and continuous improvement. Consider how you want the team to talk about moving performance. Of course, you want agents sharing best practices and coming up with ideas to improve in the area of focus. The huddle is a great place to generate ideas and share best practices.

Are we going act on everything discussed in a huddle? No. But, we do want everyone thinking about how to improve performance.

Generating a lot of ideas to deal with performance issues is sure to get one that will really work for the team. Sometimes you need to start with the issues that are causing performance to be less than what it should be. So, it is important to prioritize the issues mentioned by agents.

click slide to reveal question on PowerPoint

One way to prioritize issues, so that your team solves the most impactful first, is to ask a simple question. **"How many out of 100 calls is impacted by this issue?"** The answer to this question helps you and the team to focus on the issues with the most impact.

For example, consider the following:

- Out of 100 bundle orders, how many times does the system "time out"? If it is 3, how do you prioritize the issue? If it is 90, do you fix it?
- Out of 100 customers, how many bring this up in their calls?

How do you currently evaluate the issues brought to you by agents?

Answers will vary.

Part of your role in leading the huddle is to evaluate, assess, and address issues.

When gauging issues, consider the impact on customers and agents and the business effort needed to address the issue.

A good guide for evaluating the impact is to ask our prioritizing question from a moment ago: “How many out of 100 calls is impacted by this issue?”

Assessing the business effort to address/resolve the issue is a bit more complicated. We will look at this topic in depth in just a moment.

Based on your evaluation of the impact and effort related to the issue, you may undertake one of four basic responses.

1. Definitely do.
2. Do if you have time and resources.
3. Build a good business case by demonstrating the value.
4. Skip or Park.

The concept of **“Skip or Park”** is reserved for issues that are high effort, but low impact. By parking an issue, we acknowledge the issue, but determine that there is no return on investment for addressing the issue. Why spend a large amount of time, money, and resources doing something **(high effort)** that is not going to return any benefit **(low impact)**? We might also park an issue when there are bigger, more pressing issues that we want to tackle at that moment. It could also be that a solution to the issue is on the horizon, so it doesn't need immediate attention.

Show Slide # 22

Relate Points

Assessing Effort to Address Huddle Issues

When you are confronted with an issue, do you stop to consider the effort by various members of the organization to address or resolve the issue?

How do you currently analyze the effort it takes to address the issues brought to you by agents?
Answers will vary.

The effort needed to address an issue can be described as **click to reveal information on PowerPoint**

1. Low Effort
    a. Doesn't change policy
    b. Doesn't require guidance updates
    c. Can be done without impacting any other team

    - Resolution(s) for low effort issues can be implemented by the Team Leader with his/her team.

click to reveal information on PowerPoint

2. Medium Effort
    a. Requires policy exception or change
    b. Requires Agent Answer Center updates
    c. Requires collaboration with other teams

    - Medium effort issues are escalated by Team Leaders to Team Manager for resolution.

click to reveal information on PowerPoint

3. High Effort
    a. Requires system changes
    b. Requires other groups to make process or policy changes

    - High effort issues require the Team Manager to take to the Site Director to work with other sites and support teams for resolution.

Consider these scenarios. Are they low effort, medium effort, or high effort issues?

- Policies conflict – *Answer: medium effort*
- Agents propose that they get increased internet access – *Answer: high effort*
- Agents want stats posted twice an hour – *Answer: low*

effort

- Commercials misrepresent a product – *Answer: high effort*
- Policy is missing information – *Answer: medium effort*
- Agents want clarification of a policy – *Answer: low effort*

Deal with issues uncovered during huddles using your best professional judgment. The steps you take to resolve an issue should always be communicated to your team, even if the issue has been placed in the Parking Lot!

Question and Answer

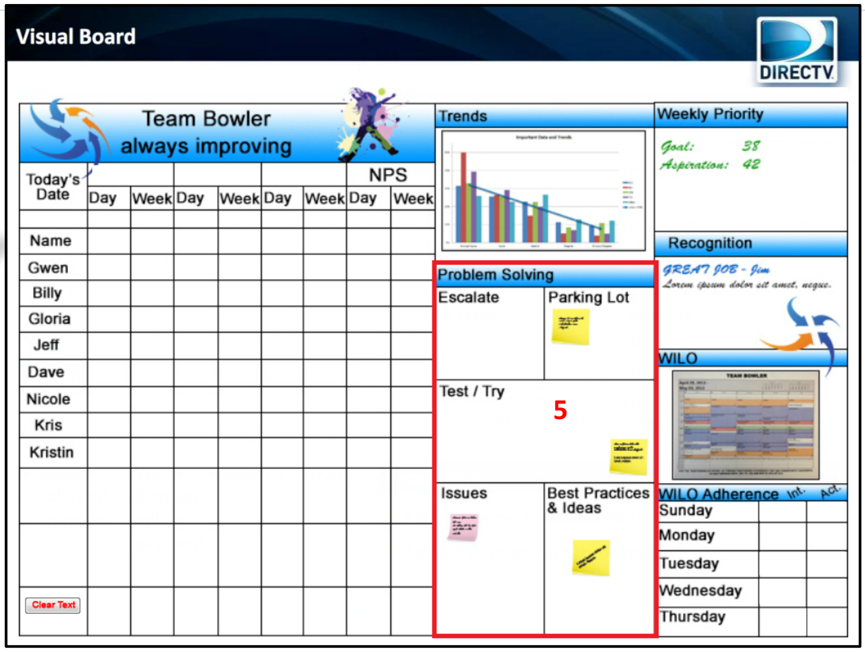
Think of an example issue you have encountered that you judged to be of high impact, but low effort. How did you approach resolving this issue?
Answers will vary; Answers should reference resolutions implemented at the team level to quickly resolve the dilemma.

What would you do if an issue was raised during a huddle that you judged to be of medium impact and medium effort?
Answers will vary.

25 Minutes

Activity: Mock Huddle – Issues/Solutions

Show Slide # 23



** For the second Mock Huddle Activity, display the Sample Huddle Board with the same metrics/data shown on the Sample Huddle Board in the first Mock Huddle Activity. Be sure to prepare your interactive Huddle Board before the activity/workshop.*

Participants will be focusing on problem solving and idea generation in this activity. Therefore, you should pre-prepare at least two issues and ideas that the participants can raise during this mock huddle, keeping in mind the metrics/data from the first Mock Huddle Activity. There should be two issues driving the performance, noted with how many calls out of 100 are impacted.

*The emphasis in this activity will be on the Problem Solving section of the huddle board, highlighted above in red and labeled 5. Sticky notes will be used to capture ideas, best practices, etc. during the mock huddle. If possible, bring a real Huddle Board into the training area to be used during this activity. If a real huddle board is unavailable, designate a place for sticky notes. **

Introduce Activity

Activity Overview

- In this activity, you will have an opportunity to witness and/or conduct a mock huddle focusing on problem solving and generating ideas.
- If you are not presenting or acting as an agent in the mock huddle, you will be coaching and/or providing feedback after the presentation. You are encouraged to use the coaching conversation model in-the-moment to debrief the huddle and promote self-assessment.

Conduct Activity

This activity is located on page 16 of the Participant Guide.

Directions

- Break the class back into the teams used in the first Mock Huddle Activity.
- Provide at least two pre-prepared issues and ideas that the participants can raise during this mock huddle, keeping in mind the metrics/data from the first Mock Huddle Activity. There should be two issues driving the performance, noted with how many calls out of 100 are impacted.
- Each team will be given 10 minutes to prep for a mock huddle presentation using **Section 2 and 3** of the Huddle Preparation Sheet in the Participant Guide and the Sample Huddle Board presented by the facilitator of this training. The prep should be completed by the team as a whole, with all participants contributing and each participant filling out his/her own Huddle Preparation Sheet.
- Participants should pay close attention to the metrics/data on the Sample Huddle Board and the issues and ideas they have been given as they plan their mock huddle.
- Each huddle should be planned for no more than 10 minutes with a 5 minute discussion period at the end.
- The team who did not present in the first Mock Huddle Activity will present their planned huddle. The team will choose a leader, and the rest of the team will act as agents.
- The "agents" in the mock huddle should use sticky notes to record their issues, ideas, best practices, etc. and post them in the designated area (real Huddle board or wall space).
- Participants on the team not presenting should be filling out the Huddle Process Confirmation Form to provide feedback for the Team Leader presenting. Be sure to supply enough Huddle Process Confirmation Forms so that each participant has one for the presenter in this activity.
- After each huddle, the observing participants should provide feedback on what went well and what can be done differently to the presenting Team Leader. Remember to use the coaching model!

Debrief Exercise

As facilitator, you should use the CLE Coaching Model to debrief the huddle. Support and build, explore, and redirect as needed. Be sure to use advanced responses when the participants accurately self-assess. Always close the debrief by summarizing and supporting.

Debrief

When debriefing this mock huddle with the Team Leader and “agents” who presented, remember to use the coaching conversation model!

- **How can you get your team back on track when a suggestion is not appropriate or you don’t have the time to discuss it?**

  Answers will vary, but should include: be ready to decide if a suggestion should go in the Parking Lot or if you should follow the topic through discussion at the time.

- **What went well during the mock huddle(s)?**

  Answers will vary but allow for a few moments of discussion and sharing.

- **What would you do differently in your huddles when you return to your agents and why?**

  Answers will vary but allow for a few moments of discussion and sharing.

10 Minutes

Episode Reflection

15 Minutes

Activity: Mock Huddle Reflection

Introduce Activity

Activity Overview

- Please take a few moments to reflect on what you have learned about huddles from watching, participating in, and evaluating a huddle.
- In this activity, you will be given an opportunity to write down and share your thoughts and observations regarding huddles.

Conduct Activity

This activity is located on page 17 of the Participant Guide.

Directions

- Take 10 minutes to fill out the Huddle Reflection form in your Participant Guide.
- Think of ways you can personalize your huddle to maximize participation and overall effectiveness.
- Additionally, note any challenges you expect and how you can help overcome these.
- At the end of the 10 minutes, we will have volunteers share their answers/ideas. The questions are on the next page.

Huddle Reflection Form

What are the biggest benefits of the huddle board?	
What do you want to track in addition to metrics?	
How will you personalize your huddles and huddle boards?	
What challenges will you face as CSRs react to having their individual performance on the board?	
What is the benefit to setting goals/ aspirations and tracking progress daily/ weekly?	

Debrief Exercise

Debrief

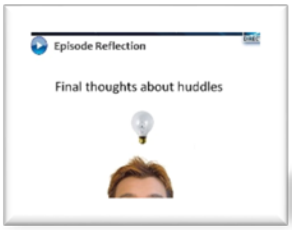
- **What are the biggest benefits of the huddle board?**
  Answers may vary but could include: Improved focus on measureable areas, cohesive messaging, recognition of outstanding and/or improving agents, increased competitiveness, promoting collaboration, self-assessment and accountability for performance, etc.

- **What do you want to track in addition to metrics?**
  Answers will vary but may include: Birthdays, DIRECTV Anniversary, team milestones, items that are unique and/or special to the team.

- **How will you personalize your huddles and huddle boards?**
  Answers will vary, but allow for a few moments of idea and best practice sharing.

- **What challenges will you face as agents react to having their individual performance on the board?**
  Answers will vary but allow for a few moments of discussion. Encourage other participants to offer suggestions or solutions.

Show Slide # 24



Final Thoughts About Huddles

At the beginning of this training, you chose one word that you wanted the members of your team and/or leadership to use when describing your huddles two months from now. Reflect on the choice you made and what you aspire to accomplish with your huddles**.**

Has your word choice changed at the conclusion of the training?

Answers will vary but allow for a few moments of discussion.