



CIMS Workshop: Introduction to Huddles

V1.3



Introduction – Huddle Aspiration

Choose one word that you want the members of your team and/or leadership to use when describing your huddles two months from now.





Objectives

- Explain why huddles are an important part of the Continuous Improvement Management System (CIMS).
- Explain how visual management is used in huddles.
- Define the role of the team leader in a huddle.
- Identify the characteristics of a good huddle.

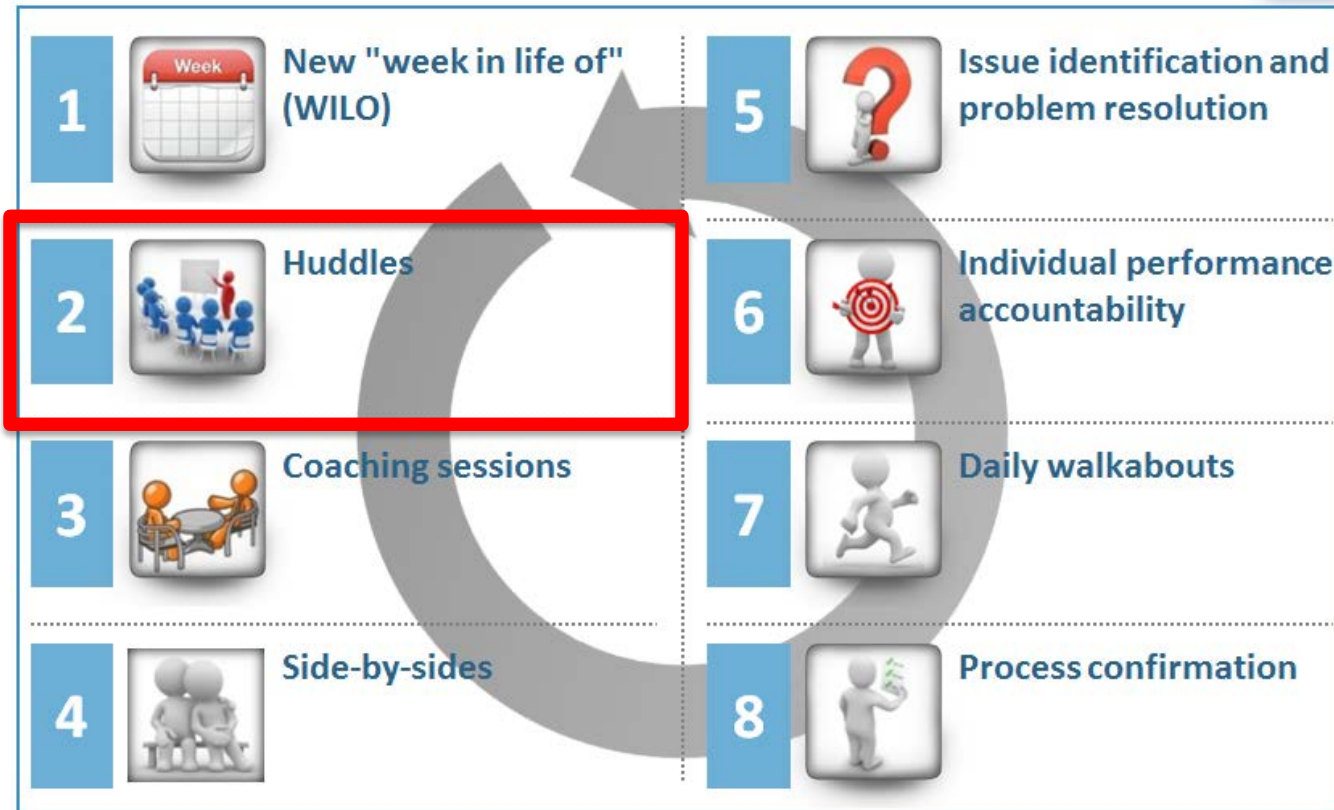


Overview of Content

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



Continuous Improvement Management System (CIMS)



Everything works as a system



Huddle Up!

- Structured, focused discussions
- Raise problems and solutions
- Opportunity for agents to focus on the week
- Starting point for issue identification & problem solving





Why Huddle?

Huddles enable . . .

- Visibility into key metrics.
- Progress to targets.
- Fast response to issues.
- Focused, root-cause problem solving.
- Self-assessment and accountability for performance.
- Data-driven coaching and feedback of the team.
- Collaboration on best practices to accomplish the team's performance objectives.
- Engagement of the team!



Visual Management





Example of a Huddle Board

WELCOME
TO *Fabulous*
NESTING
Team Meyer

DATE	X-FERS	CBACKS	CLAIMS	NPS
5/6				
Hayley	0↓ 4	22↓ 32	9↓ 13	-25
Michael	20↑ 13	12↓ 21	20↑ 16	75
Actual	9↑	28↓	15↑	25↓
Goal	10	17	10	38
Aspiration	10	17	10	42

CLAIMS

Quote of the Day
"We ourselves feel that what we are doing is just a drop in the ocean. But the ocean would be less because of that missing drop."
Mother Teresa

How are you trending...?

ESCALATE

TEST-TEST

ISSUES

REST PRACTICES

25 GOAL: 38
ASPIRATION: 42

20/25

WILO

	NPS	ACTS
Secondary	0	0
Primary	3	2
Secondary	1	1
Primary	0	0
Secondary	4	



Principles of Huddle Boards



Accessible

Clear

Target-Driven

Balanced

Controllable



Your Huddle Board

Fun



Trends



Problem Solving



Weekly Priority



Recognition



Transparency



WILO



Team Meyer

DATE	X-FERS	CBACKS	CLAIMS	WTD
5/6	0↓ 4	22↓ 32	9↓ 13	-25
	20↑ 13	12↓ 21	20↑ 16	75
	9↑	28↓	15 = 25↓	
	10	17	10 38	
	10	17	10 42	



Individual Metrics



Characteristics of Good Huddles



What They Are



What They Are Not





How Huddles Work

Logistics

Overview: Conducted near the beginning of each shift

Frequency & length: 15 minutes daily

Who: All team members + Anyone directly involved in day-to-day operations

Where: At the team's performance board

Led by: Team leader / Designated agent

Huddle agenda

1. How are we performing? (3-5 mins)
2. How do we achieve goals/targets today? (3-5 mins)
3. How can we improve moving forward? (5-10 minutes)
4. Afterwards, TL notes items that need follow-up in "parking lot"



Video: Huddle





Team Leader's Role Defined

Preparation

Delivery

Wrap-up and
Debrief



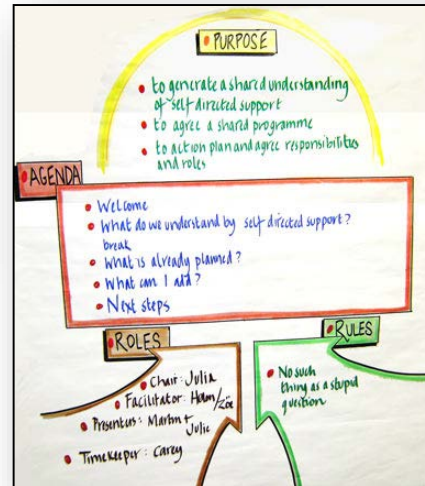


Areas of Huddle Preparation

Meeting Logistics



Meeting Rules



Attendees





Huddle Preparation Tools

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 can we improve on our Team Goals? (5-10 minutes)	How have the solutions we've been testing been working? 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)				
<input type="checkbox"/> Provide praise for targets achieved or exceeded?			Yes/No	
<input type="checkbox"/> Review performance from yesterday?			Yes/No	
<input type="checkbox"/> Review performance trends over the last week/month?			Yes/No	
<input type="checkbox"/> Highlight performance gaps requiring further discussion?			Yes/No	
Game plan for today (10-15 minutes)				
<input type="checkbox"/> Discuss drivers of performance gaps as a team?			Yes/No	
<input type="checkbox"/> Discuss and set targets as a team?			Yes/No	
<input type="checkbox"/> Provide encouragement?			Yes/No	
<input type="checkbox"/> Ask high performers to share best practices on target areas?			Yes/No	
<input type="checkbox"/> Identify and prioritize issues to be problem solved?			Yes/No/NA	
<input type="checkbox"/> Note new initiatives and issues on the board?			Yes/No/NA	
<input type="checkbox"/> Review status of priority problem solving efforts?			Yes/No/NA	
<input type="checkbox"/> 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 _____

Overall huddle assessment _____



Active Team Participation in Huddles

Encourage Discussion & Solicit Input

Challenge the Team's Thinking

Guide the Process





Prompts for Guiding a Huddle

"That's an interesting point and I would like to get a better understanding of how it fits in with the issue..."

"So, what you're saying is ..."

"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."

"Is it realistic to expect to achieve that within the timeframe?"

"Suppose we did it this way ... what would happen?"

"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 ...?"


"Another company does this ... would that work here?"


"What do you think, Anne?"






Activity: Mock Huddle - Performance

Visual Board




Team Bowler

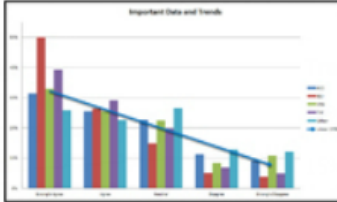
always improving



Today's Date	NPS							
	Day	Week	Day	Week	Day	Week	Day	Week
Name								
Gwen								
Billy								
Gloria								
Jeff								
Dave								
Nicole								
Kris								
Kristin								


Clear Text


Trends





Problem Solving

Escalate

Parking Lot


Test / Try


Issues


Best Practices & Ideas


Weekly Priority


Goal: 38

Aspiration: 42


Recognition

GREAT JOB - Jim

Lorem ipsum dolor sit amet, negue.



WILO



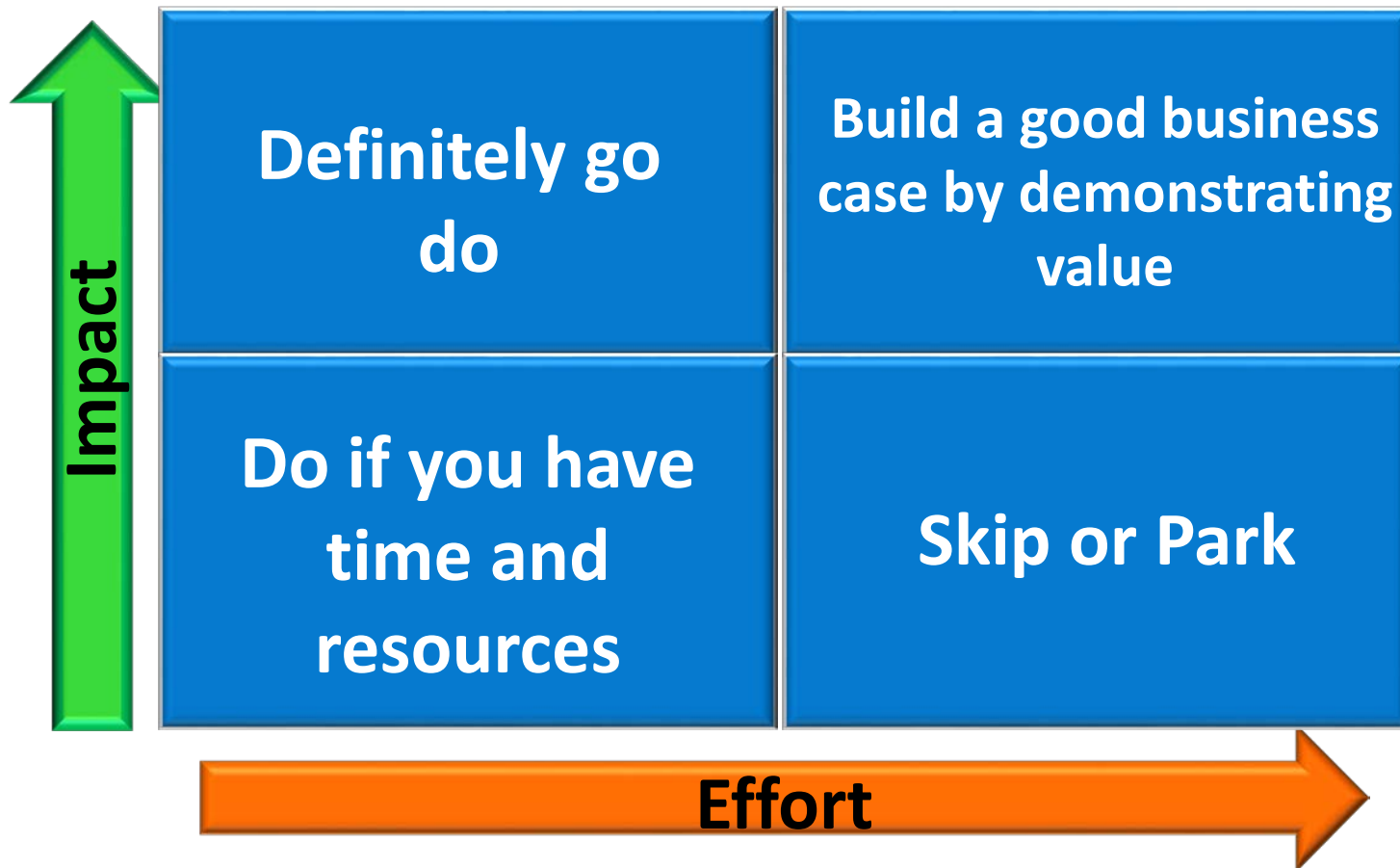
WILO Adherence Int. Act.

	Int.	Act.
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		



Evaluating Huddle Issues

How many out of 100 calls is impacted by this issue?





Assessing Effort to Address Huddle Issues

Low Effort

- Don't change policy
- Don't require guidance updates
- Can be done without impacting any other team



Team Leader implements on team

Medium Effort

- Require policy exception or change
- Require Agent Answer Center updates
- Require collaboration with other teams



Team Leader escalates to Team Manager/Site Director

High Effort

- Require system changes
- Require other groups to make process or policy changes



Site representative works with other sites and support teams



Activity: Mock Huddle – Issues/Solutions

Visual Board

Team Bowler
always improving

Today's Date	NPS							
	Day	Week	Day	Week	Day	Week	Day	Week
Name								
Gwen								
Billy								
Gloria								
Jeff								
Dave								
Nicole								
Kris								
Kristin								

Clear Text

Trends

Weekly Priority

Goal: 38
Aspiration: 42

Problem Solving

Escalate	Parking Lot

Test / Try

Issues	Best Practices & Ideas

Recognition

GREAT JOB - Jim
Lorem ipsum dolor sit amet, negue.

WILO

WILO Adherence	Int.	Act.
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		



Episode Reflection

Final thoughts about huddles



Don't just watch TV. **DIRECTV.**





TM/TL CIMS Workshop: Introduction to Huddles

Greenlight ID #6806

Participant Guide

Version #1.2
Updated: June 12th, 2013



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)
- _____
- _____
- _____
- _____



Why Huddle?

Huddles enable . . .



Huddle Boards

Five Principles of Huddle Boards

Accessible

Clear

Target-
Driven

Balanced

Controllable



Characteristics of Good Huddles



What They Are



What They Are Not



Team Leader's Role in Huddles

Team Leader's Role Defined

Preparation	Delivery	Wrap-up and Debrief



Areas of Huddle Preparation

Huddle Preparation

Meeting Logistics

Meeting Rules

Attendees

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--	--	--

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Active Team Participation in Huddles

Encourage Discussion & Solicit Input

Challenge the Team's Thinking

Guide the Process

A large, empty rectangular box with a blue border, intended for notes or examples related to the 'Challenge the Team's Thinking' section.A large, empty rectangular box with a blue border, intended for notes or examples related to the 'Guide the Process' section.



Activity: Mock Huddle - Performance

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.

Directions

- Obtain a blank copy of the Huddle Process Confirmation Form.
- You will be broken into two teams.
- Each team will be given 10-15 minutes to prep for a mock huddle presentation using **Section 1** 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.
- You should pay close attention to the metrics/data on the Sample Huddle Board as you plan your 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.
 - Ask open-ended questions to open discussion and close-ended questions to narrow discussion.
 - 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 . . .”
- One team will volunteer to demonstrate their planned huddle. The team will choose a leader, and the rest of the team will act as agents.
- If you are not on the team presenting the mock huddle, you should be filling out the Huddle Process Confirmation Form to provide feedback for the Team Leader presenting.
- After each huddle, you 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!
- Different volunteers will conduct as many mock huddles as time permits (typically 2-3 mock huddles total). Be sure to obtain a blank Huddle Process Confirmation Form for every presenter.
- The Huddle Preparation Sheet, Sample Huddle Board, and Huddle Process Confirmation Form are provided on the next few pages.

Sample Huddle Board

Visual Board



Today's Date	Day	Week	Day	Week	Day	Week	Day	Week	Day	Week

Trends

Problem Solving

Escalate

Parking Lot

Test / Try

Weekly Priority

Goal: 38

Adherence: 42

Recognition

GREAT JOB - Jim

A person who does what's best, recognizes.

WILLO

WILLO Adherence W/L Acc.

Day	Acc.
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	

Issues

Best Practices & Ideas

Clear Text

Huddle Preparation Sheet

Date:

Shift:

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

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) Yes/No
- 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) Yes/No
- 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
- **Were PSB updates covered?** 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

What went well? _____

What do differently? _____



Activity: Mock Huddle – Problem Solving & Generating Ideas

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.

Directions

- Gather with your team from the first Mock Huddle Activity.
- The facilitator of this training will provide at least two issues and ideas that can be raised during this mock huddle, keeping in mind the metrics/data from the first Mock Huddle Activity.
- 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.
- You should pay close attention to the metrics/data on the Sample Huddle Board and the issues and ideas you have been given as you plan your mock huddle.
- Each huddle should be planned for no more than 10 minutes with a 5 minute discussion period at the end.
- The team that 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.
- Participants on the team not presenting should be filling out the Huddle Process Confirmation Form to provide feedback for the Team Leader presenting.
- An additional copy of the Huddle Process Confirmation Form will be provided to you by the facilitator of this training.
- After each huddle, you should provide feedback on what went well and what can be done differently to the presenting Team Leader. Remember to use the coaching model!



Activity: Mock Huddle Reflection

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.

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, volunteers will share their answers/ideas.
- The Huddle Reflection form is provided 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?