

DAILY HUDDLE - BEST PRACTICES & TIPS

[Click here to view the Daily Huddle agenda.](#)

Please be sure to update the Daily Huddle EVERY DAY. Unless you are on PTO or sick, this should be filled out daily by EVERYONE. Huddles create value when the information is relevant to the team and provides USEFUL updates – which means everyone needs to contribute and submit thoughtful content.

Purpose:

1. Team building- creates a sense of alignment and accountability with everyone
2. Motivational- begin the day on a positive note (bring energy)
3. Informational- share the knowledge needed, stay informed about what's going on
4. Problem Solving- understand the challenges that need resolution
5. Culture- creates feeling of unity and oneness Example: Sports team huddle (everyone on the same page to win the game)

Expectations:

1. Participation
 - What's up what happened of relevance yesterday and what's happening of relevance today (relevant to the team)
 - Stucks or Needs where are you stuck and/or have a need that someone can help you with?
 - Top Priority what is the ONE thing that you will complete today – your TOP priority the day – be sure and use – TODAY I WILL...
2. Speed Is Key (no leaning, sitting....STAND UP! It's uncomfortable, so you will go faster!)
3. Huddle Sheets completed and brought to Huddle or Huddle section completed in Align – preparation is KEY
4. **If in person:** Look everyone in the eye (tighten up the circle)
5. **If Remote:** Use your preferred meeting format, but cameras should always be on
6. Prepare during each day for the next day's Huddle (find your What's Up to report)
7. Length: 15 minutes or less...
8. Take discussions 'off line' or stay after huddle – don't steal others time
9. Start on time: _____ am/pm – every time (regardless of who is missing)

Best Practices & Tips:

FILL OUT YOUR HUDDLE FOR TOMORROW, AT THE END OF THE DAY TODAY

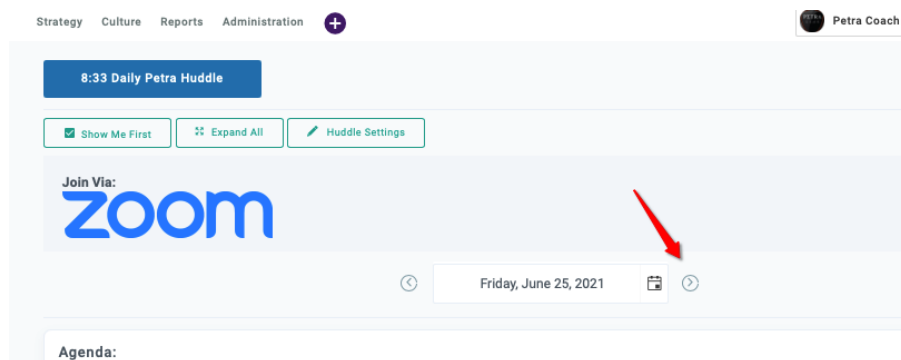
When you are entering information *for the next day* be sure to click **arrow** at the top right of the Daily Huddle section.



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"If you don't like change, you'll like irrelevance even less."

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ROUND 1 → WHAT'S UP SECTION

- Start your huddle off with what happened yesterday that the team needs to know
 - Your update should be more than a couple words
 - Share learning from the field or office, outcomes of meetings, updates from your team/dept.
 - Include shout-outs, CV stories- give appreciation
- Update the team on what's going on today
 - This is not a to-do list
 - This will be more than 3 words - what does the team need to know?
 - Are you out of office and unavailable for a period of time?
 - BE SPECIFIC
- Read your update exactly as it is written in the What's Up section
- If there is someone not in huddle, you will need to go back and read their What's Up section after huddle
- If you cannot attend huddle – add it to your huddle section (example below)

What's up for Today ?

Thanks to everyone for a great Monday meeting. Katey, I love the theme...way to go. Dr. P, the "more stuff or more stories" thing was brilliant and hit me like a ton of bricks...thank you. Yesterday, I was able to begin digging deeper into learning more about cash conversion...more to come. And, did my prep for being at the EC most of the day today.

Today, I have individual meetings/LCIs with Heather, Mike and Brynn at the EC to learn more about them personally in advance of our kickoff in a couple of weeks.

ROUND 2 → PRIORITY REVIEW

- Your priorities will be reviewed every day for the first quarter of your Petra engagement.
- This is not the place to go into the details
- You will simply update the team on your KPI
- Example Priority: Read 4 books this quarter, x of 4



ROUND 3 → STUCKS (IF APPLICABLE) & TOP PRIORITY

- What is the single most important thing for you to accomplish today?
- Start this by saying “Today I will...”
- BE SPECIFIC

Top Priority for Today ⓘ

☐ Contact all open invoices for action step to get payment

Yesterday I was supposed to

☒ Member KO-SOP created and reviewed with Taylor

WHEN YOU ARE NOT IN HUDDLE

When you are not able to attend the Daily Huddle, put **Not in Huddle** and the reason why in the What's Up section. For example, if you have a meeting with a potential client, if you are on vacation, etc. This will help move the huddle along faster and smoother.

Erin Laney

What's up for Today ⓘ

OOO with the family. Returning on Monday

What's up for Today ⓘ

NIH - Headed to DIA for NYC

Every two weeks, I will be sharing "Catch A Candidate" action items in WH, this way everyone can hear new ideas and be able to snowball off another. AB, MC - I set up a 2 hour block to go over Liv Communities in AZ for next Tuesday, please let me know if that doesn't work, and if it doesn't, another time that will. MB, thank you for your help on the business side of things and for catching up! Always appreciated.

Headed to NYC for CAC tomorrow. I have a 4 hour flight ahead of me. Call me this evening if you need me, I'll be out of pocket all day tomorrow.

Optional: If a person is not in huddle for a day – read their What's Up section out loud to the team who is physically in huddle. Assign a person to read the people's What's Up who are not able to be in huddle for that day. If you are not in huddle, it's your responsibility to go into Align and read the updates from the team.



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