Follow The Action - Huddles: Design

THE HUDDLE CYCLE

PRE-HUDDLE 15-30 Minutes	**MAIN-HUDDLE** 30-60 Minutes	**POST-HUDDLE** 15-30 Minutes
TEAM SCOREBOARDS REVIEW WORKGROUP PERFORMANCE DRIVERS DEVELOP A FINANCIAL OPINION FROM OPERATIONAL PERFORMANCE COMMUNICATE **UP** THROUGH THE COMPANY	**FINANCIAL SCOREBOARDS** REVIEW FINANCIAL/CRITICAL NUMBER PERFORMANCE DEVELOP A BIG PICTURE FINANCIAL OUTLOOK COMMUNICATE **ACROSS** THE COMPANY	**FINANCIAL SCOREBOARDS** SHARE AND DISCUSS FINANCIAL OUTLOOK DEVELOP IDEAS AND PLAYS FOR IMPROVEMENTS COMMUNICATE **DOWN** THROUGH THE COMPANY

FEEDBACK LOOP — RUN THE PLAYS

SMALL ORGANIZATION

PRE-HUDDLE 15-30 Minutes	**MAIN-HUDDLE** 30-60 Minutes
TEAM SCOREBOARDS REVIEW WORKGROUP PERFORMANCE DRIVERS DEVELOP A FINANCIAL OPINION FROM OPERATIONAL PERFORMANCE COMMUNICATE **UP** THROUGH THE COMPANY	**FINANCIAL SCOREBOARDS** REVIEW FINANCIAL/CRITICAL NUMBER PERFORMANCE DEVELOP A BIG PICTURE FINANCIAL OUTLOOK COMMUNICATE **ACROSS** THE COMPANY

FEEDBACK LOOP — RUN THE PLAYS

Sample Main Huddle Agenda

Huddle Leader: Joe Smith

Meeting Place: Conference Room

Participants: All employees

Meeting Time: Wednesdays at 9:00 am

Duration: 30-60 minutes

Agenda Items:	Duration:	Person Responsible:
Opening Comments: Huddle Leader offers any big changes that affected the company in the past week (this could be external such as a shift in economic conditions or internal issues such as staff change).	5 min.	Joe
Scoreboard Update - Forecasts: Each owner will tell a 2-3 sentence story if the variance is greater than 5-10% over/ under plan during Forecast 1 and 5-10% over/under the previous Forecast for Forecast 2-5. Huddle leader offers a "roll-up" view of the whole scoreboard, with a quick "diagnosis" of the health of the month based on this week's forecasts.	20 min.	Line item owners/ Sharon driving
MiniGame Update	10 min.	Michael
Financial Literacy Training Bite: The huddle leader is encouraged to stop for small training bites during the scoreboard update to check everyone's understanding (this sometimes can replace the formal training bite section on the agenda).	5 min.	Steve
Celebrations/Thanks	5 min.	Cindy
Action Items For Next Huddle/Commits: What is one thing I can do this week to help our monthly forecast look better next week? In a large company this may be done in the pre-huddles with each department sharing a commit.	10 min.	All
Closing Comments: Save all other items not on the agenda for a separate meeting. If you are incorporating the huddle into your regular staff meeting, call an official end to the huddle and then talk about things not listed on this agenda during the staff meeting portion.	5 min.	Joe