



PETRA PROCESS

**DAILY HUDDLES:
KEEPING TEAMS ALIGNED IN REAL TIME**



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LIFE LESSONS for BUSINESS OWNERS

What's your daily news source? Is it a local news program that you listen to in the background while you're getting ready for work? Or maybe you prefer a nightly national news program to unwind after a long day? Whatever your personal preference, we all want to stay connected and informed about the world around us.

As the world has become more connected through technology, the speed of publishing news has become almost instantaneous. And that same acceleration of information is happening in our business organizations today.

In his book, "Team of Teams," General Stanley McChrystal asserts that organizations have to plan and react at the same speed as the changes in their external environment. Using the Civil War as an example, McChrystal points out that battles in the 1860s only required generals to create multi-month battle plans – because that's as fast as the enemy could march troops over long distances. However, today's enemy can change strategies, leaders and methods in near real-time. As a result, the military has to plan and react in real-time as well. And like our modern generals, business leaders must learn to adapt quickly too.

So how can your organization keep up with the ever increasing speed of information, and a marketplace changing in real time? Adopt a Daily Huddle to get your company's "Daily News." Here's my simple formula:

HEADLINE NEWS – Begin with all members of the team contributing "Headlines", including important news from yesterday and today that is relevant to the team – whether it be client news or internal successes. Celebrate wins whenever you can – especially when you can tie them back to your company's the Core Purpose, Core Values or BHAG (big hairy audacious goal).

WEATHER – Just like the weather forecast, this is the section of the Daily Huddle where team members share relevant metrics and forecasts. Leaders can report on company critical numbers and individual team members can report on how their progressing with quarterly individual priorities and key performance indicators (KPIs). Every organization is different, but once you get started, you can modify your agenda for what works for your team.

TRAFFIC – This section is also known as “Stucks.” At this point in the huddle, everyone has a chance to voice any roadblocks that are keeping them from achieving their goals. A stuck is always specific to one person. For example, “I can’t send out the Acme proposal until I get the estimated shipping cost from Mary.” The Daily Huddle should only be used for stucks when other communication methods haven’t worked. If the huddle is being used for a lot of stucks, that might be a signal of internal communication issues. Any person that is given a “Stuck” should follow up after the huddle with the person that assigned them the stuck to determine next steps.

FEATURE STORY – There is no single ideal size of a huddle, but it’s typically a team from 10-25 people that need to share information to do their job efficiently. In larger organizations that require multiple Daily Huddles, it’s important to have a team member in every huddle that “connects” to another Daily Huddle. These are typically the team leaders that participate in their team huddle and then participate in a second leadership huddle. This allows information to cascade up or down throughout the organization.

SOME KEY RULES TO REMEMBER:

- Daily Huddles must be done daily, and should take less than 15 minutes.
- Every member of the team must come prepared, ready to give their report on each section of the “daily news.”
- When possible, use a system like Align to record each participant’s Daily Huddle in writing. This also provides a convenient method for people that missed a huddle to catch up on the news and to keep others updated.
- Go around the room four times to share headline news, weather, traffic and feature story one at a time. If each person does everything at one time, they might “check out” for the rest of the huddle.
- Most important, just like the local TV program, start on time every time.

Creating a Daily News rhythm in your organization will empower your team members with the information they need to do their job effectively and create shared awareness of the celebrations, losses, struggles and wisdom learned on a daily basis. An effective huddle will also reduce the need for other forms of internal communication (like emails and the office pop-in). Best of all, it will become a daily habit that will keep all team members informed and connected.



THE PETRA EXPERIENCE

The Petra Experience is like a Mental Marathon of focused effort to create a specific set of priorities and a planned process to achieve them... as a team.

Looking to change your business life - forever?

The daily grind of growing a business is tough... it doesn't have to be that way. We work from our own business experiences while focusing on your business – as coach and an accountability partner. We implement the Petra Process in a way that ensures it “sticks” then we stay engaged to keep you on your path to success and less frustration. We don't want this to be just another thing you start – then it gets ignored and finally dies... let's stop that cycle in your business. The Petra Program 'clarifies' what is most important to be done – by whom, by when – **AND** creates an accountability structure to ensure **IT GETS DONE.**

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