

Nov 1, 2007 The Art of the Huddle

How to run a prompt, productive, and painless morning meeting.

Every weekday at 9:30 a.m. sharp, the executive team at Bishop-Wisecarver, a Pittsburg, California, manufacturing company, files into the boardroom. They stand around the table; no sitting allowed. Then rat-a-tat-tat--each fires off a brief synopsis of the items on his or her frontmost burner. If the controller reports trouble with a vendor, president Pamela Kan promises to intercede. If the sales director says a client has requested a custom product, the team quickly decides whether it's worth pursuing. Ten minutes later all are back in the office armed with the information necessary to barrel efficiently through their days.

Bishop-Wisecarver is one of many companies embracing daily micromeetings--affectionately called "huddles" or "check-ins"--as a way to keep everyone moving in sync. A vintage business tool practiced everywhere from Capital One (NYSE:COF) to the Ritz-Carlton, huddles got a boost in the small-business community from Verne Harnish, who proclaimed them a must-do for growth companies in his 2002 book *Mastering the Rockefeller Habits*. Short daily meetings, in Harnish's view, keep companies focused on the same strategic goals, ensure timely answers to pressing questions, and enforce accountability because everyone knows what everyone else is up to.

Despite the popular conflation of "meeting" and "hell," daily huddles are too streamlined to irk even hard-core meeting grouchers. They last no more than 15 minutes. They start on time. And problem solving is forbidden. Beyond those ground rules, however, huddles are endlessly customizable. Some companies huddle first thing in the morning; others right before lunch. Some invite a handful of top leaders; others the entire staff. Some follow a formula; others make it up every time. No matter the format, the huddle has become an essential tool for some CEOs, particularly those at growth companies trying to maintain an entrepreneurial culture. "If you're a small organization, not doing this is crazy," says Patrick Lencioni, president of the Lafayette, California-based consultancy the Table Group and author of *Death by Meetings*. "When you're small, you can develop connections among staff that make you more nimble. Daily check-ins help you build a culture of unity and sustain it as you grow."

Here's how five CEOs use a meeting a day to keep chaos away.

1. The team builder

The Company: Bishop-Wisecarver, a \$20 million maker of machine components

The Purpose: Pamela Kan started the meetings two years ago to improve communication. "Even though we're a small company, people had put up silos," says Kan. "There wasn't a lot of trust and respect between them as peers. Things were going wrong solely because people didn't talk to each other."

How It Works: Kan says teamwork improved greatly once information-sharing became routine. Numerous snafus have been averted; for example, if the plant superintendent reports trouble with a machine, the sales director can adjust his delivery schedule. And by reviewing her executives' to-do lists, Kan has been able to identify micromanagers and nip their do-it-myself propensities. Finally, the

meetings have weeded out executives who didn't communicate openly with their peers; Kan says failure to participate was a factor in one or two dismissals.

Huddle Hint: No one notifies participants that the meeting is starting. Regular, prompt attendance is "another cultural flusher," says Kan. "If someone consistently doesn't show up, the group sees him as not wanting to be part of the process."

2. The coordinator

The Company: Healthcareseeker.com, a \$5 million nurse staffing agency in Boonton, New Jersey

The Purpose: The eight-person company manages as many as 900 contracts at a time, and new orders arrive daily. CEO Stephen Halasnik wanted a way to help his small staff establish priorities and coordinate its efforts.

How It Works: Everyone on staff comes to the morning huddle at Healthcareseeker.com. Employees quickly review information on new jobs and new nurses who have signed on, then adjust their schedules to focus on the most important accounts of the moment. A salesperson, for example, might mention a new job from a very profitable customer that he now considers a top priority; a recruiter will then plan to spend his afternoon finding the best nurse for that position; and the HR director will move background checks on likely candidates to the top of her to-do list. Anyone else with relevant information tosses it into the ring. "It organizes both individuals and the organization," says Halasnik. And the meetings dispatch nitty-gritty issues that once bogged down weekly strategy meetings, allowing Halasnik to reserve those hourlong gatherings for big issues.

Huddle Hint: Halasnik holds his 15-minute meetings at 11:45 a.m. "People are always hungry then so they won't let me drag things out," he says.

3. The efficiency expert

The Company: Citizant, a \$20 million consulting firm based in Chantilly, Virginia

The Purpose: CEO Raymond Roberts wanted to replicate the culture of efficiency he had observed in other businesses that huddle, including the insurance company where he started his career.

How It Works: Citizant's huddles are models of efficiency. Everyone in the office--from 20 to 40 people, depending on who is traveling--presents his day's top priority in eight to 15 seconds. "Just the act of verbalizing 'This is the thing I must get done today' focuses people and increases productivity," says Roberts. "And once they've said it, people stick to what they've said." Employees also mention appointments--at the dentist or their kids' school--so those needing to talk with them can arrange their own schedules accordingly. The whip-fast swapping of data cuts down on inefficient one-to-one conversations and e-mail strings during the day, Roberts says. "And huddles are great equalizers because everyone from the receptionist to the CEO is in that room."

Huddle Hint: Citizant's huddles commence at 8:43 a.m. The odd time gets people thinking in increments of minutes and subtly influences the meetings' pace, says Roberts. A musical clip that plays on employees' computer speakers is the cue that it's time to gather.

4. The motivator

The Company: 1-800-Got-Junk?, a \$100 million junk removal franchiser in Vancouver, British Columbia

The Purpose: In 2003, CEO Brian Scudamore introduced all-company huddles to "take the daily pulse" of his 14 employees. Today's huddles include nearly 200 employees and are motivational as well as operational.

How It Works: Scudamore credits huddles for maintaining a "tighter, unified culture" as 1-800-Got-Junk? has grown. The seven-minute, all-standing meetings are conducted in a room built for that purpose. Each meeting begins with good news about the company or an individual, and ends with a cheer for the contributions of one employee. In between, the session's leader announces three critical numbers, and a department head runs down the headlines on his or her group's activities. As a result, employees stay abreast of company performance and, Scudamore says, feel part of a larger whole. Finally, employees identify things the company could do better, which provides fodder for more substantive meetings later on.

Huddle Hint: Twenty employees--mostly rank-and-filers--trained as "huddle masters" take turns leading the sessions.

5. The strategic planner

The Company: Advanced Facilities Services, a \$10 million facilities management company in Cheektowaga, New York

The Purpose: Founder and CEO Brian Brault, a devoted reader of Harnish's book, started huddling about five years ago to attempt to keep everyone focused on critical long-term issues. Brault also conducts huddles at Pure Solutions, his start-up company, which sells a system that renders hotel rooms allergen-free.

How It Works: The CEO meets with five of his top managers, working off a one-page strategic plan. The company has a 30-year plan and three- to five-year objectives as well as quarterly and yearly goals. In 30 seconds to a minute, each manager states what he will do that day to advance the quarterly and yearly goals, what progress he made the previous day, and what roadblocks he is encountering. Through these meetings Brault learns instantly if someone is veering off course or if there's a misunderstanding.

Huddle Hint: Brault signed on to a conference-call service so he doesn't waste time connecting people traveling for business. He has also asked employees with BlackBerrys to set meeting alarms.