

AM & PM Huddles

Overview:

Morning Huddles: Morning Huddles are essential to preparing the team for a successful day while driving employee engagement and fostering a healthy team dynamic. The intention for the huddle is to provide space to celebrate wins, share individual accountability of priorities and commitment and to address any immediate challenges that the entire team should be made aware of or can be in support of.

Afternoon Huddles: Afternoon huddles close the loop on morning commitments. Priorities and commitments that are at-risk or have not been resolved as planned should be vocalized for team collaboration and support. (what has popped up since this morning that we need to prioritize)

Rules of Engagement:

- **Be Attentive.** Be on time, be on camera, and be present.
- **Provide clarity and seek clarity.** Be specific and deliberate with your commitments.
 - GOOD: Ex. "Today I have 20 new open cases and my goal is to successfully close at least 15"
 - Try to Avoid: "Today I have a lot on my plate, I am hoping to get most done this morning" - *try to define and link to the metrics being tracked.*
- **Support** each other by empowering team members to act as role models and reinforce each other with **positive feedback**.
- Encourage **open communication** on topics amongst the team.
- Demonstrate that you **trust** your team members by empowering individuals to own specific team deliverables.

Meeting Frequencies:

2x- daily (e.g .Start of day and before the end of day)

An effective huddle should:

- Start in an odd hour (ex 8:13 AM or 3:14 PM).
- Begin with good news (wins)! (client &/or personal).
- Review KPI's & metrics related to your priorities for the day.
- Review any stucks you may foresee / have for the immediate future.

Your Role as a Participant:

Knowing the following intentions coming into morning huddles will help to drive the conversations that will make the huddle effective.

- Know if I had a good day yesterday.
- Know what I need to do to make today great.
- Surface any issues to my team lead/members in this huddle so they can help me make today great.
- I listen to my team members so that I can help to make their day great.
- I surface issues so other people in the org can help to solve persistent problems.
- Today, strive to raise the bar and be better than/ was yesterday.