

# DC | HEALTH

## Empowering Teams with Visual Huddles

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# WHAT DO YOUR HUDDLES LOOK LIKE?

Do you have huddles?

- What frequency?
- How long?
- Are they useful?

# WHAT I'VE SEEN

- Inconsistent frequency
- Top down communication
- “Another meeting”
  - Limited frontline staff buy-in
- Often verbal
  - Action items on sticky notes
- Drags on

# WHAT THEY COULD BE?

- Inconsistent frequency
  - Top down communication
  - “Another meeting”
    - Limited frontline staff buy-in
  - Often verbal
    - Action items on sticky notes
  - Drags on
- Every day, same time
  - Team members take turns leading
  - Data driven, action oriented
    - Serving staff, customers
  - Visual Management Board
    - Everything visual
  - Quick! 10-15 minutes, standing

**WE KNOW ALL VALUE OF HUDDLES...**

**WHY DO YOU THINK (ROOT CAUSE) THEY DO NOT GET WELL IMPLEMENTED AT YOUR AGENCY?**

# ACCUSATION AUDIT

## POTENTIAL ANSWERS TO YOUR TEAM'S HESITANCY

**“We’re too busy for another meeting”** – the huddle is not another meeting to attend. Instead of problems developing and not being addressed until monthly meetings (or even worse, when they’re on fire), huddling gives a chance to identify problems before they become a lot more work to fix later. Once huddles are established, you’ll often spend less time in larger meetings

**“We don’t need a huddle when we see each other every day/week”** - this is a time when you’ll have everyone’s uninterrupted attention. It’s a great opportunity to ensure you’re working on the things that will give you and your team’s performance the highest impact (the work you do is directly aligned with program goals)

# VISUAL HUDDLES IN A NUTSHELL

## WHAT MATTERS MOST?

Measure the daily/weekly things the team cares about, for example

- Visit duration

- Completeness

- Staff mood

Display the info

Work on it

Document and celebrate

### The Team!



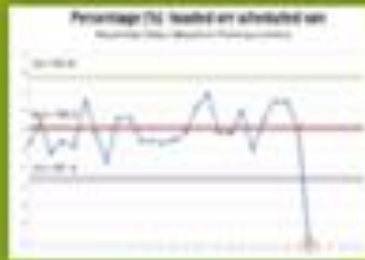
Process: Create load lists

Purpose: To ensure that the correct packages are loaded on the transport on time



Safe Lifting Methods

Load Lists  
Standard Operating Procedures



Goal: 90% loaded on scheduled van



### KPIs

1. Number of booked packages loaded on confirmed transport
2. Accuracy of load lists

### Issues/Suggestions

1. Missing data
2. Lack of equipment
3. How about using VOIP?

### Improvement Action

- Look into reasons
- Confirm new delivery date
- Investigate feasibility

Who	When
Anna	Week 49
Tim	Week 50
Rani	Week 02





# AGENDA?

## EASY! REVIEW THE BOARD, IT'S NOT WALLPAPER

### Example Agenda

1. Good News
  1. Updates on road blocks, celebration of team members
2. Top 1 - what is the thing we want to get done this week?
  1. What was our Top 1 last week? Did we do it? Why / why not?
3. Metrics – review of data. Color coded red/yellow/green. Improvement ideas flow from data review
4. Barriers to work
5. Housekeeping
6. Cheer – end with joy, fun quote, verbal cheer, anything to smile and unify!

# TIPS FOR OPERATIONALIZATION

- **Consistency** - The huddle should take place in the same place (where the work gets done), at the same time on the same day. Should last no longer than 20 minutes; a target number to start is 10 minutes.
- **Gradual** - Use the PDSA model to implement daily huddles (see IHI supporting doc). Once huddles are normalized, introduce visibility boards.
- **Build Capacity** - Once a team becomes familiar and the process is standardized, consider having a different staff member lead each huddle. Engagement, ownership, and sustainability will increase.
- **Communication** Top→Bottom and Bottom→Up “What can we do to help you?” or “You Said – We Did” module (Communication strategy needs to include and respect bottom-up)
- Best practice doc from King County government

# NOTES FROM KING COUNTY, WA

## Exhibit 2: Changes in King County's Performance Management Form, Content, and Process

### Now (Performance Forums)

Focus on process measures in order to provide information that can frequently be used. Outcome measures are used, but are not the primary focus.

More frequent (weekly/monthly) monitoring, allowing better follow-up on performance issues.

Executive team goes to the departments to review the measures.

Red is OK, as is asking for help.

Departments conduct their own management huddles and roundings.

Departments are expected to use their data. Roundings are designed to review data, compare performance targets, and help align the county organization with goals.

### Then (KingStat)

Focus primarily on outcome measures.

Monitoring occurred once every two months or once a quarter.

Departments present their measures to the executive.

Red is bad, and is to be avoided.

The executive holds reviews, and departments might or might not use the measures to monitor and manage performance.

Performance monitoring is mainly used by a small group of top county leadership.

<https://www.gfoa.org/sites/default/files/GFR121716.pdf>

# BEST PRACTICES

## ADHERENCE TO PROCESS IS KEY

1. Location is accessible and owned by all (not locked away in a provider office)
2. Start on time, end on time, quick
3. Standing agenda, on the board
  1. In addition to reviewing board, consider questions for each team member:
    1. What did I do yesterday, what I'll do today, any barriers, or
    2. What successes did I have yesterday, what challenges did I have?
  2. Customer review – safety or process concerns
4. Meeting is NOT where problems are solved
5. Close with celebrations, final closure (e.g. huddle is over, let's have a great day!)

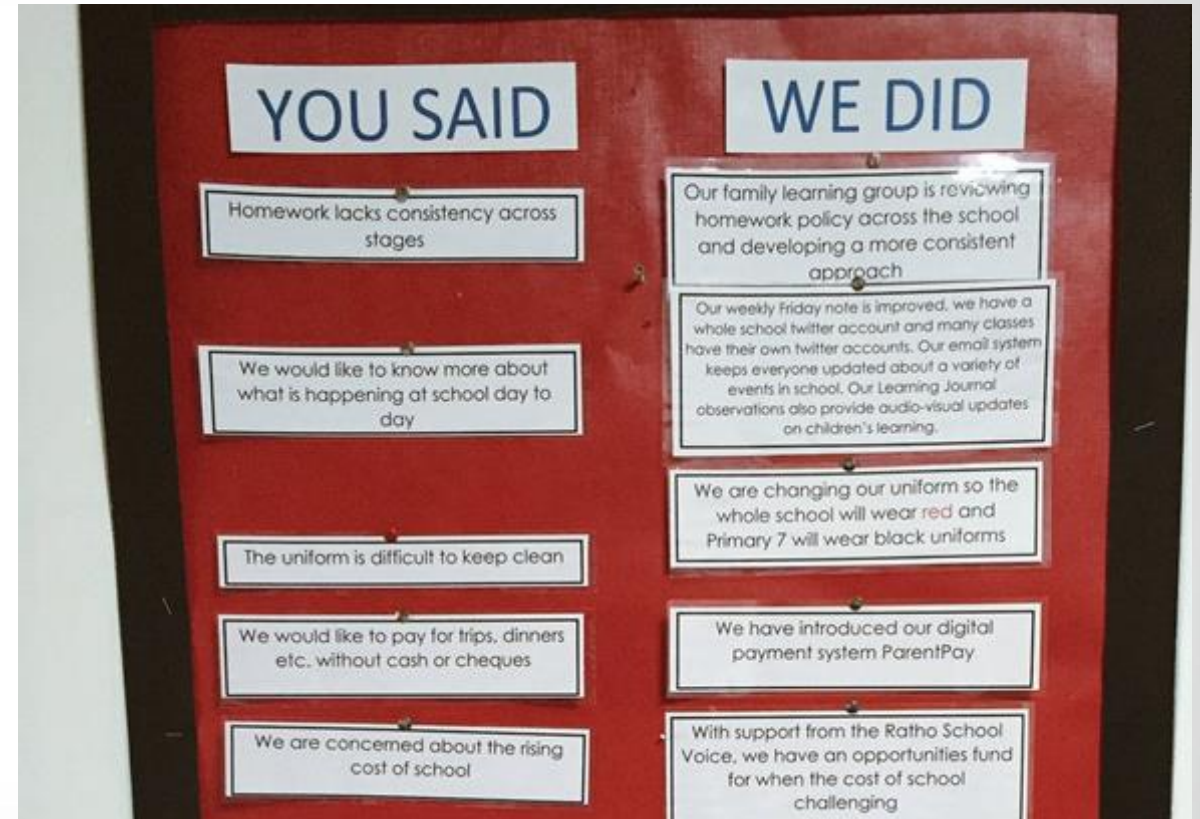
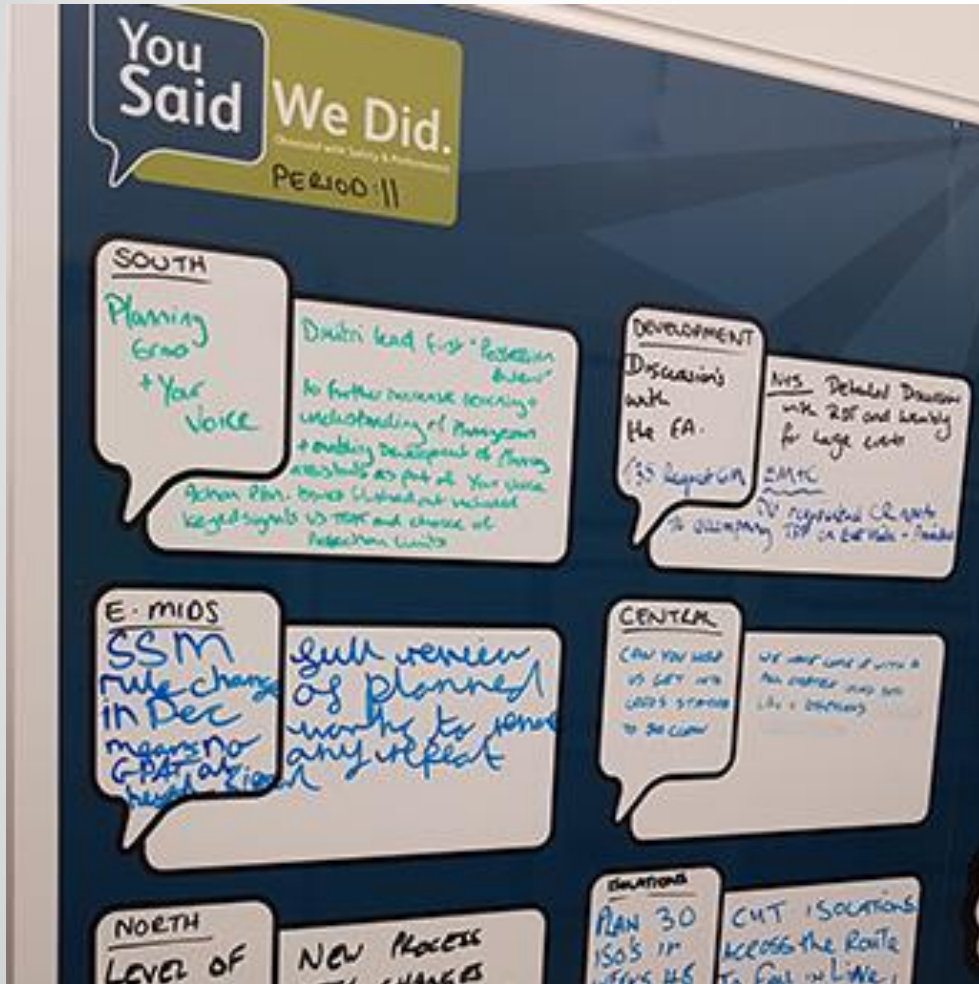
<http://www.ihi.org/communities/blogs/five-tips-for-better-huddles>


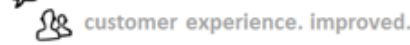










# COMMUNICATION & ENGAGEMENT



Department: TBD		<h1>Kaizen Newspaper</h1>			 <b>Shmula.com</b>			
Line: 1					 customer experience. improved.			
		Root Cause Determined 	Countermeasure Established 	Countermeasure Complete 	Issue Resolved 			
Issues			Priority			Improvement Tracking		
Date	Originator	Concern/Kaizen Opportunity	Owner	Root Cause	Countermeasure	Est. Date of Completion	Status	Actual Completion Date
							⊕	
							⊕	
							⊕	
							⊕	
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# WHAT DO WE CARE ABOUT?

## VISUAL HUDDLES ON MORE THAN CLINIC PROCESSES

A Cleveland Clinic Surgery Supply team reported trust as a major concern. They used their huddle board to display team-voted characteristics of fictional trustworthy and non-trustworthy team members. Every week, the team voted (with pennies, into boxes) on the mood of trust in their team and the results were shared on the board.

[https://www.youtube.com/watch?v=mmb\\_xwxmOi8](https://www.youtube.com/watch?v=mmb_xwxmOi8)

Tracking Question of the Week  
There is a climate of trust within my work group.



Bill can be trusted because...

Bill is always on time  
Bill is always helpful  
Bill is always honest  
Bill is always reliable  
Bill is always respectful  
Bill is always supportive  
Bill is always trustworthy  
Bill is always communicative  
Bill is always collaborative  
Bill is always open-minded  
Bill is always flexible  
Bill is always adaptable  
Bill is always resilient  
Bill is always positive  
Bill is always optimistic  
Bill is always confident  
Bill is always assertive  
Bill is always decisive  
Bill is always organized  
Bill is always efficient  
Bill is always effective  
Bill is always successful  
Bill is always happy  
Bill is always healthy  
Bill is always wealthy  
Bill is always powerful  
Bill is always influential  
Bill is always respected  
Bill is always admired  
Bill is always loved  
Bill is always trusted



Pete can not be trusted because...

Pete is always late  
Pete is always rude  
Pete is always dishonest  
Pete is always unreliable  
Pete is always disrespectful  
Pete is always unsupportive  
Pete is always untrustworthy  
Pete is always uncommunicative  
Pete is always uncollaborative  
Pete is always closed-minded  
Pete is always inflexible  
Pete is always unadaptable  
Pete is always unresilient  
Pete is always negative  
Pete is always pessimistic  
Pete is always unconfident  
Pete is always unassertive  
Pete is always indecisive  
Pete is always disorganized  
Pete is always inefficient  
Pete is always ineffective  
Pete is always unsuccessful  
Pete is always unhappy  
Pete is always unhealthy  
Pete is always unwealthy  
Pete is always unpowerful  
Pete is always uninfluential  
Pete is always disrespected  
Pete is always unadmired  
Pete is always unloved  
Pete is always untrusted



### Culture Surgi

Culture of Improvement  
What matters most?

Answer: "velocity grows  
faster than trust our people"

What prevents us from  
our customers?

Use the culture of improve  
barriers



### Our

As a team, we decided  
significant barrier to us

Team Management

Problem Solving

Communication



# Pete can not be trusted because

He talks down about everyone

He has no face

He shares information told to him in confidence

He has been caught in lies

He does not keep us updated on any changes

He looks shady



He does not

# Bill can be trusted because

He has good work ethics

I can depend on him

He helps job go smooth

He keeps you updated on any changes

He has my back

His words match his actions

He does what he says he will do

Fixes issues of mine on their own

He has not



## Tracking Question of the Week

There is a climate of  
trust within my  
work group.



Completely  
Agree



Somewhat  
Agree



Somewhat  
Disagree



Completely  
Disagree



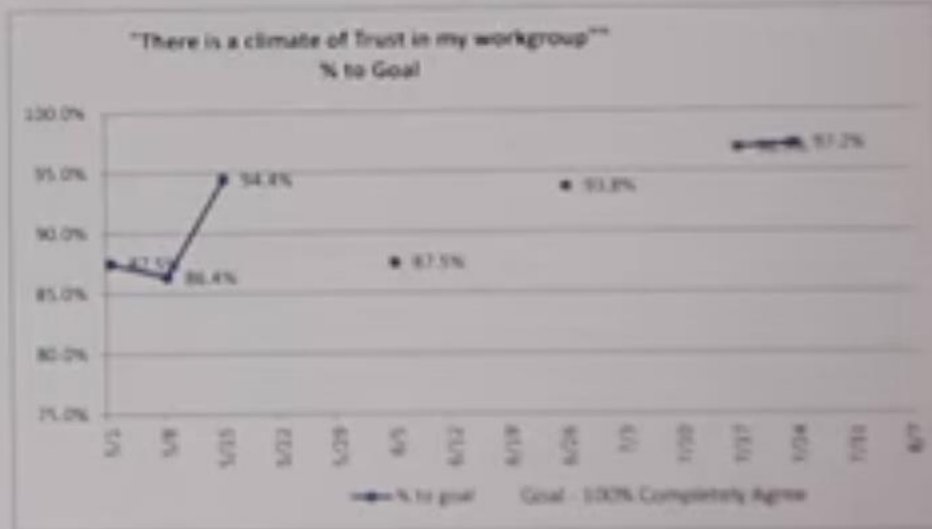
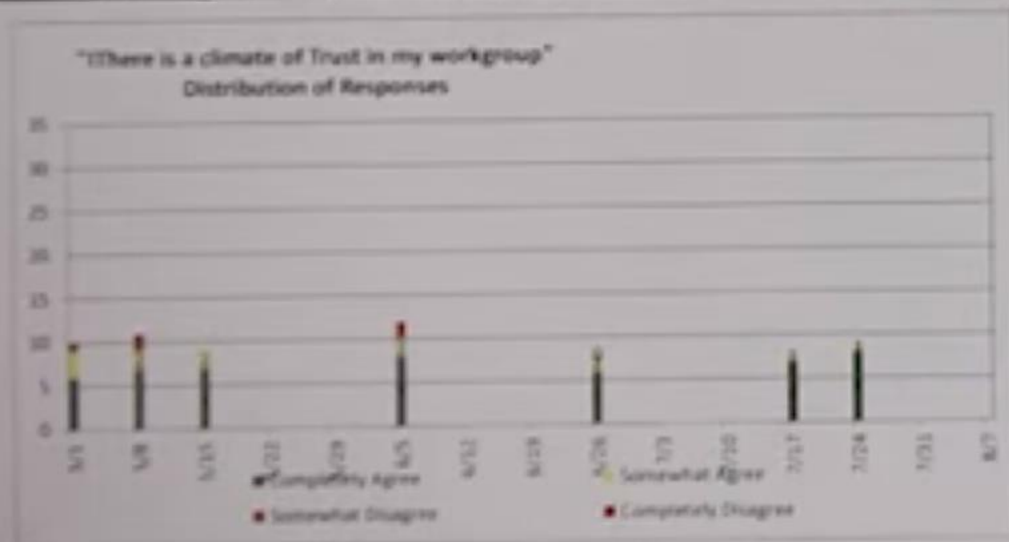


# Surgical Supply

## Employee Engagement

"There is a climate of Trust in my workgroup"

Week Ending	Points	5/3		5/8		5/15		5/22		5/29		6/5		6/12		6/19		6/26		7/3		7/10		7/17		7/24		7/31		8/7			
		Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points	Returned	Total Points		
	4	6	24	1	28	7	28					8	32							6	24					7	28	8	32				
	3	3	9	2	6	2	6					1	6							2	6			1	3	1	3						
	2	1	2	2	4							2	4																				
	1																																
			10	35	11	38	9	34					12	42						8	30					8	31	9	35				
Goal			80		44		36						48							32						32		34					
% to goal			87.5%		86.4%		84.4%						87.5%							93.8%						96.9%		97.2%					



# OTHER APPLICATIONS FOR VMB

Visual Work Plan

Project Management

Status of Improvement Ideas



# Roadmap

OTR

Q1 2018

Q2 2018

Q3 2018

Q4 2018

Q1 2019

Q2 2019

Q3 2019

Culture

IT

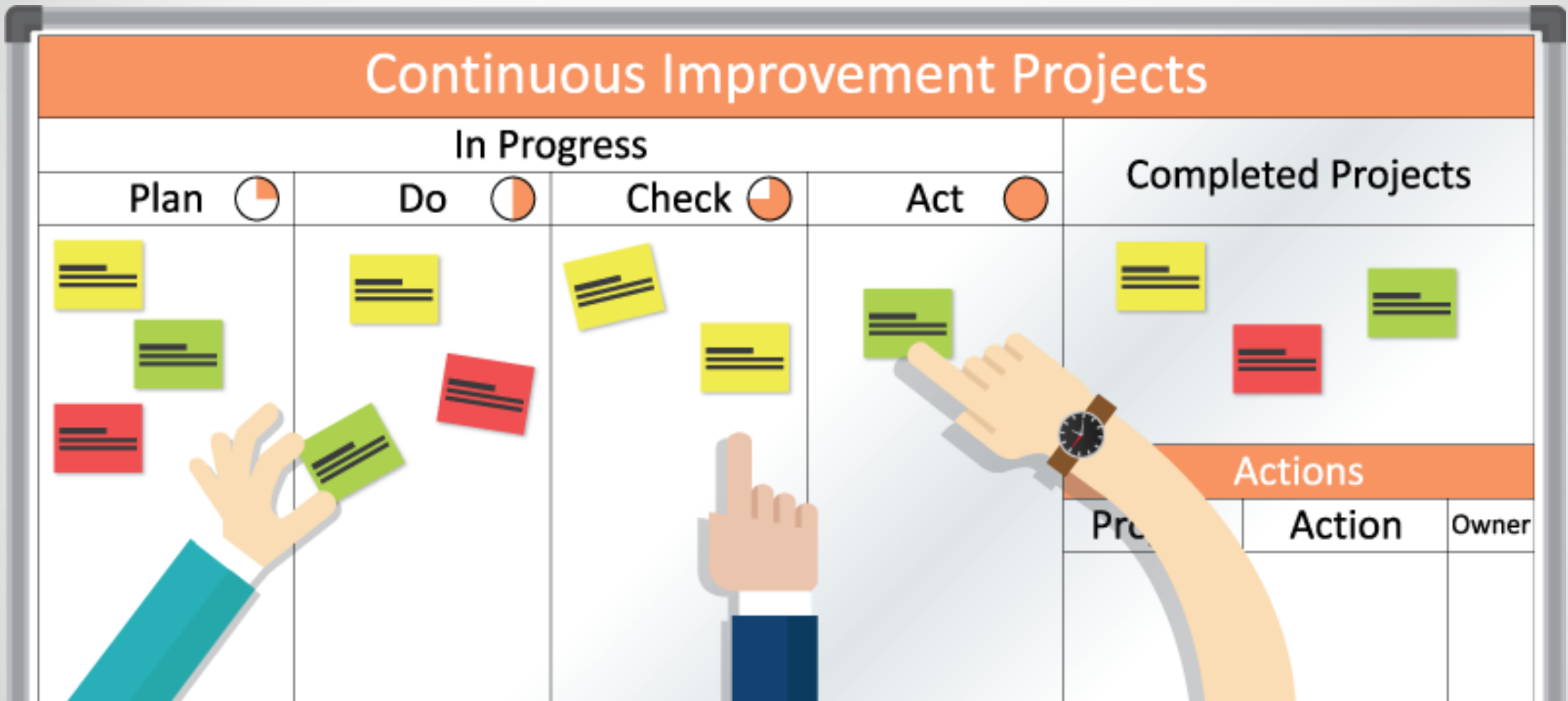
Strategy

Culture

Training

A grid of sticky notes organized by quarter and row. The rows are labeled 'Culture', 'IT', 'Strategy', 'Culture', and 'Training'. The columns represent quarters from Q1 2018 to Q3 2019. The notes contain various project names, dates, and status indicators (checkmarks, X's, and handwritten text). For example, in the 'Culture' row, Q1 2018 has a note about 'The 10000' and Q2 2018 has notes about 'The 10000' and 'The 10000'. In the 'IT' row, Q1 2018 has a note about 'The 10000' and Q2 2018 has notes about 'The 10000' and 'The 10000'. In the 'Strategy' row, Q1 2018 has a note about 'The 10000' and Q2 2018 has notes about 'The 10000' and 'The 10000'. In the 'Culture' row, Q1 2018 has a note about 'The 10000' and Q2 2018 has notes about 'The 10000' and 'The 10000'. In the 'Training' row, Q1 2018 has a note about 'The 10000' and Q2 2018 has notes about 'The 10000' and 'The 10000'.

# VMB FOR IMPROVEMENT IDEAS



# WHY HUDDLES FAIL

- Accusatory culture persists. When teams are process/problem instead of person focused, and have a developed culture/space where they are comfortable sharing problems (nonjudgmental/punitive), huddles can thrive.
  - The culture has to be ready.
- Standards don't exist and/or measures don't reflect the work. If I don't know the standard for a process or cycle time, I can't adjust my flow and these measures don't matter to me. Alternatively, I may be working and doing improvements, but if I can't see my impact, I'll probably stop.
  - Are we measuring (and sharing) what we care about?
- Too long. If huddles drag on, they become another long meeting that few enjoy attending. Keep it focused.
  - Are we being honest to the process?

# LAST THOUGHTS

1. Apply the IHI model on implementing huddles to launching visibility boards. Start slow with areas covered, think about which areas would work for your team. Minimum areas recommended are
  1. A few measures
  2. Improvement ideas
  3. Celebration/successes
2. Keep working through the challenges. There is light at the end of the tunnel, where you and your team are feeling engaged and unified in direction. If you're not feeling this way after three months, keep pushing through. Continue to get feedback from the team. Talk to a QI Coach/SME.
3. There is not a final destination. QI and by extension Visual Huddles, are about continuous improvement. The needs of your team six months from now are not the same as today - the board should reflect that (measures and modules.)