DAILY HUDDLES: AN AGILE TECHNIQUE TO IMPROVE PROJECT COMMUNICATION

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ABSTRACT

Incorporation of the stand-up huddle into traditional waterfall project management methodology can improve communication in complex, multi-site projects. Huddles are intended to provide an inclusive space for project team members to collaborate in real time and to aid in fostering a culture of psychological safety. Specifically, this paper explores the hypothesis that stand-up huddles can help achieve the following project goals: 1) increase flexibility to accommodate change, 2) improve coordination of work across multiple project teams, and 3) improve communication of high impact decisions between project leadership and project teams.

Introduction

This paper explores augmenting the traditional waterfall project management methodology with the stand-up huddle to improve communication in complex, multi-site projects. Specifically, the goals are to improve real time and up-to-date communication between the organizations' leadership teams, internal project teams, and our partner organization's project teams to achieve the following: 1) increase flexibility to accommodate change, 2) improve coordination of work across multiple project teams, and 3) improve communication of high impact decisions between project leadership and project teams.

The Case for Huddles

According to Provost, Lanham, Leykum, McDaniel & Pugh (2015), huddles have pervaded healthcare organizations over the past decade and have shown promising operational and teamwork benefits, especially in terms of enhancing relationships through information exchange and learning opportunities across departments, disciplines and even organizations. Within complex systems, huddles are intended to provide the organization with an inclusive or interdepartmental space where folks who would not normally interact have a chance to connect (Provost et al., 2015). As a result, problems can be quickly identified and brought to light faster than if the teams were to continue operating in silos. In addition, huddles provide the opportunity for timely responses or high impact decisions in real time and with all the right folks in the room. More importantly, if implemented properly, huddles can help cultivate a culture of psychological safety, thereby encouraging employees to speak up with concerns or raise questions to leaders who may be pressed to make a quick decision in a rapidly changing environment (Provost et al., 2015). By fostering this type of culture, it is more likely that unintended or negative consequences are more easily identified, openly discussed and prevented in the system.

The American Medical Association (AMA) developed the STEPS*forward* (AMA, 2015) huddle toolkit to provide clinical practices with a blueprint for implementing productive huddles. While geared more toward clinical practice, this guide can be used in non-clinical practice as well. Key factors for successful implementation include: establishing a routine time and huddle location, involving the right people, designating a huddle leader or facilitator, creating a template or checklist to create a "soft" meeting structure and continuously improving the huddles over time ("Implementing a daily team huddle", 2016; Verzuh, 2015). More importantly, the AMA identified the opportunity to utilize a small portion of the huddle to strengthen team culture and engagement by recognizing team members for their hard work in front of their peers (AMA, 2015).

The Catalyst

During the execution phase of a large, complex, multi-site project, the leadership teams noted that critical milestones were being missed while, at the same time, the volume of communication issues identified by project teams was increasing. For instance, an October 1 milestone of executing all new contracts was missed. In the same timeframe, the Contract teams reported that leadership had decided to change contract rates without including them in the discussion or adequately communicating the change to them. As a result, last minute contract amendments had to be issued with the corrected rates, adding significant delays.

In response to these challenges, the core project teams met to conduct a root cause analysis. First, we recognized a recurring theme: deadlines were being missed and delays were occurring due to a lag in or a misalignment of communication between leadership, the project manager, and the project teams. Next, we validated this assumption by cross walking key communication issues and their corresponding log dates reported in the RID (risk, issues and

decisions) grid with missed milestones on the network diagram. After these issues were pinpointed, we then performed the "5 Whys" technique[1] to ensure proper identification of the root cause of the problem. Based on this simple analysis, we identified the root cause to be a lack of opportunity and structure to communicate with all relevant parties across the project. Decisions were being made with little input and without examination of the consequences. We determined that we needed a communication tool that was standardized and efficient. After a review of options and consultation with seasoned project managers (S. Caesar, October 31, 2016), we proposed introducing the stand-up huddle to our practice. We received approval from leadership, who noted that the organizational culture was perfect for experimenting with this agile communication tool due to our highly collaborative and innovative environment (R. Ray, November, 4, 2016). The huddles would consist of a brief daily stand-up between core project and leadership teams to discuss the following:

- recently completed work,
- current work,
- barriers needed to be addressed or decisions needed to be made to meet deliverables, and
- needed information or action from other departments (S. Caesar, October 31, 2016; Verzuh, 2015).

Implementation and Results

We started by implementing weekly rather than daily huddles with the flexibility to increase meeting frequency upon demonstrated value. In addition, it was agreed upon that the project sponsor and the executive champion would attend these huddles and would be granted the authority to make decisions on behalf of the larger Steering Committee. Key representatives from each team were identified and notified via email by the project sponsor, who gave a brief overview of the proposed huddle structure as well as the questions that each team would answer during the meeting. (See Appendix A for list of questions.) Effective November 7, the teams began gathering every Monday afternoon for thirty minutes with our virtual team members joining us via video conference.

The designated huddle leader began the first huddle with a brief introduction to the new meeting structure, expectations, and the anticipated benefits to the project teams and leadership. To assist the discussion, we displayed the huddle questions on a large projector screen with a screen sharing tool for remotely located teams. Everyone was asked to stand up for the entire meeting, including the folks on video conference as standing helps to keep the huddles short and to the point.

This initial group of fourteen people proved to be too large to be effective and efficient. We recognized the need to create smaller, separate, and more frequent huddles between specific project teams, allowing them to work together on complex deliverables that required coordination but not decision making or support from leadership or the larger group. To date, we have convened a total of five larger standing huddles and approximately fifteen smaller, more focused huddles. In the first five weeks of implementation, there has been a 40% decrease in communication-related issues reported by the project teams. Based on these initial results and with support of the team members, the Steering Committee is considering whether to increase meeting frequency to two times a week.

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[1] According to CMS's Quality Assurance and Performance Improvement (QAPI) program (Centers for Medicare and Medicaid, n.d.), the 5 Whys is a simple problem-solving technique that helps get to the root cause of an issue or problem quickly. The strategy involves reflecting on a problem and continuously asking "why" as to what is causing the issue. Usually the answer to the first "why" prompts the next "why" question which in turn prompts another "why" and so on; hence the name Five Whys.

Tracking quantitative data related to implementation of group huddles has provided evidence to their effectiveness. We plan to continue tracking this information and expanding qualitative and anecdotal feedback. Thus far, informal verbal evaluations and debriefs with the teams have led to small improvements such as the use of a "parking lot."[2]

Examples of successful huddles

Example 1. We discovered a significant misalignment on our policies between clinical and non-clinical staff as well as leadership expectations. Discussing this openly among team members from various disciplines and with varying experience levels allowed leadership to make an informed final decision based on the group's input. This meeting structure also created multiple communication channels in which to quickly disseminate this decision to key stakeholders outside of the group and helped foster joint accountability among team members to ensure the message was delivered in real time.

Example 2. We identified a set of trainings which were being provided by different departments on the same topic but to different audiences. We determined that standard training materials could be created thereby eliminating the need for multiple trainings. This discovery reduced the project schedule by two weeks and training costs by more than 20%.

Conclusions and Recommendations

The hypothesis that standing huddles will result in improved project performance has been confirmed. Since implementation we have seen a significant decrease in communication-related issues that previously resulted in project delays. We also have seen an increase in team engagement and interdepartmental problem solving. There is still plenty of room for improvement to maximize benefits achieved through this agile and flexible communication tool. In the next phase, we plan to implement a tracking system to record the qualitative and anecdotal results.

The stand-up/huddle is a tool that can easily be added to existing practices to improve communication in complex projects. Below we have listed four key elements for successful huddle implementation within project management.

Huddle size and frequency. In cases where the large huddle meets weekly, smaller, focused huddles can provide specific teams the opportunity to communicate on a more frequent basis.

Video conferencing for remote members. In large, complex projects team members may be geographically dispersed. While formal video conferencing with screenshare technology is ideal, teams have successfully used innovative approaches like Facetime to reduce set-up time and to build a stronger connection with remote teams.

Leadership support and engagement. Commitment by our project sponsor and the executive champion to engage with and support project staff is imperative to the success of huddles. To help foster an environment of psychological safety, leadership has maintained an open mind and genuine curiosity in understanding front line staff's perspectives and subject matter expertise. They have also agreed to observe, stepping in only when specifically called upon by the group. This has increased team engagement, creating joint ownership in solving complex problems.

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[2] The Parking Lot is a simple project management facilitation tool that helps track important items, ideas or issues that are not necessarily relevant or useful to discuss in the current forum. The idea of the parking lot is to capture these items but return to them later to keep the current meeting focused and on track. The tool itself can be easily constructed with a piece of flip chart sheet and Post-It notes.

Results and continuous improvement. Track both quantitative and qualitative data. Tracking feedback from huddle participants will further improve the process and increase engagement. Some examples of evaluation templates and techniques include Ryan Quinn's open-ended short questionnaire and Shannon Provost's semi-structured interview questions (Quinn et al., 2013; Provost et al., 2015).

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Appendix A: Daily Huddle Questions

1. What work did you or your team recently complete?
2. What are you or your team currently working on now?
3. What barriers need to be addressed to meet your deliverables?
4. What decisions need to be made by leadership to meet your deliverables?
5. What information or action is needed from other departments to complete your work?