LARGE PROJECT HUDDLE AGENDA

Created by Michel Handfield, founder of ValueaddLean

Please find below an example provided as part of the blog, *A Trade Partner Daily Huddle*, published on The Lean Builder.

BEFORE THE HUDDLE

1. Change date on board to "Today's" date.
2. Select today's presenter to share the leadership role.
   - Use the Wheel of Fortune App. Spin the wheel to randomly select who the presenter will be.
   - Nobody is exempt; it's about everyone developing confidence and sharing the leadership role at the site.
3. The foreman reviews the weekly work plan and commitments they have made with the project manager or at the site trade partner meeting. They consider:
   - What tasks need to be completed today,
   - The number of tasks that need to be completed by the individual team members, and
   - Commitments they have made with the site/schedule.
4. The foreman reviews the team's progress, the successes from yesterday's tasks, and results compared to yesterday's goal setting. They consider:
   - Assess if we completed what we said we would complete,
   - Prepare to celebrate if we hit our goals, or
   - Understand why if we did not complete.
5. Collect any key notes or information that will need to be shared at the meeting including:
   - Company notes for sharing, and
   - Site or schedule notes from trade partner meeting.

AFTER THE DAILY TRADE PARTNER MEETING

Place information collected at the meeting in the "Information" section of the planning board.

1. Erase all information items that are more than 2 days old; this information will have already been shared with your team.
2. Add any information that should be shared with the team on the white board under "Information" section.
3. Write today's date on the board behind items that you added to the Information area of the board to share at your next huddle.
4. Review the "Work Plan" and committed tasks that are on the planning board. Adjust the assignments, loading and resequencing the tasks based on the Daily Trade Partner meeting.

DURING THE HUDDLE - AGENDA

INFORMATION SHARING

1. **Greet the Team**
    - Check in to see the team is present and ready to go.
2. **Introduce New Team Members**
    - Team members come and go, so it is important that we ensure everyone knows who is on the team.
3. **"Information" - Site and New Information Sharing**
    - Review all current "Information" items on the board with the team.
        - Read each site information note, comment, or expand as required.
        - Erase all items that are older than 2 days old.
4. **Safety Check**
    - Ask team if any site conditions have changed that we need to address today.
    - Complete Team Safety Assessment and discuss risk and mitigation.

TEAM LEARNING: IMPROVEMENT

Often, teams do not talk about the mistakes or errors that have occurred, and they can go unchecked and unimproved. When we bring these up in our huddle, we use team learning to improve our outcomes. The foreman:

- Shares any concerns, issues, constraints, or quality items that occurred in the previous days, and
- Asks the team if there is some way we can improve or fix this, to collaboratively discuss and align on a solution.

GOAL SETTING & PRODUCTION PLANNING

Go to the first name or team on the planning board and complete the following steps.

- Review Yesterday’s work:
  - Did we complete the task in their “Today’s” task column?
  - Did we hit our estimate time in “My Guess” from the last huddle?

  If we are off target, ask what happened. Have a collaborative discussion on lessons learned.
  If the task was completed on time. Celebrate! Add a “HAPPY FACE” in the “PPC” area.

- Remove the “Task Magnet” from “Today’s Tasks” area.
- Erase the “My Guess” area for the completed task.

- Move the “Next Task” to the “Today’s Task” area.
  - Read the task.
  - Ask and confirm what the task is with the owner.
  - Ask how long they think it will take to complete.
  - Write their estimated time under “My Guess.”
  - The foreman adds his estimated duration under the “Foreman’s Guess.”

  If there is a big difference between the person’s guess and the foreman’s estimate, a collaborative discussion is had around the approach to the work and current site conditions. When the foreman and the trades person have aligned on one estimate, the estimates on the board are updated.

- Ask the trades person doing the work:
  - Is anything going to slow you down?
  - Do you see any constraints?
  - Write down any cited constraints in the "Constraints" column.

    Discuss the constraints and collaboratively create an action plan to mitigate or minimize the impact of the constraint. If the constraint cannot be mitigated or controlled, the foreman escalates by bringing the found constraint to the daily trade partner huddle.

THE GOAL SETTING STEP THEN REPEATS THROUGH
EACH PERSON OR TEAM ON THE PRODUCTION BOARD.

MORE TEAM LEARNING IDEAS

WEEKLY CONTINUOUS IMPROVEMENT PILOTS

Lean is based on creating a culture of Continuous Improvement.

1. We set aside time for improvement each day. We use this Daily Continuous Improvement Time for completion of the team's process improvements.
2. Share any improvements from other parts of the company in the last 24 hours.
3. Update the team on this week's team improvement progress. If you do not have an improvement in progress for the week, start a new one.
4. Identify and start a new improvement.
   a. Use the discussions around the variation in task estimates, any constraints, or observed quality issues as time for finding an improvement.
   b. Share your concern, constraint, or quality issue you noted with your team.
   c. Ask the team if there is some way we can improve or fix this.
   d. Write the improvement on the board.
   e. Assign team members actions for all trials or follow up to complete the improvement.
   f. All team members should complete their actions before the next weekly improvement huddle and share their progress with their team daily.

THE FOREMEN LEADS, EXPLORES, AND DOCUMENTS THE TEAMS' IMPROVEMENTS.

WEEKLY WORK PLAN

Review your weekly work plan against your current tasks and the tasks in the "Work Plan" column on the board. Adjust assignments, task loading, and resequencing the tasks' list based on the week's submitted work plan.

WHAT WE NEED LIST

Team members will tell you what they need if you provide them with a location to order materials and supplies. Encourage the team to populate the "We Need" area whenever they notice something running short.

- The team member writes the required supplies on the board.
- The foreman validates and then orders requested supplies.
- When the supplies are ordered, the foreman erases them from the board signaling to the trades person that their material is on the way.

BACKLOG LIST

The Backlog section is where we create a list of all the items that are found and will need to be completed prior to the end of the project.

1. These tasks are generally clean up, fixes, or modifications that will need to be done by project end.
2. These are not committed tasks that would be on the "Work Plan."
3. The backlog should be managed <u>daily</u> looking for opportunities when work is being done in the same area as the backlog item; this will reduce set up time for a future trip.
4. This work should be in <u>addition to</u> the committed tasks and should be done as 2^{nd} priority.
5. Review these tasks and assign any available tasks to the individual team or trades as capacity allows:
   a. Move the Backlog task magnet to the "Next Task" field of the person you wish to assign the task to. Tasks can overlap in the "Next Tasks."
   b. The task can be place in "Today's Task" if the trades person or team think they can fit it into today's work plan. Ask the individuals if they think that can complete the work. If they say yes, move to "Today's Tasks."
6. Invite the team to add tasks to the Backlog based on things they see in the field.
   a. A team member writes the task on the board.
   b. The foreman reviews, validates, and approves the task.
   c. The backlog item is considered live and ready for processing.