

# Monday Morning! Now What?!

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Wake up! It's Monday morning! There is a lot to do this week and we must get started! Sound like something you've heard before? Monday's (or any other day for that matter) that you gather your team for a meeting is perhaps the most powerful 30 minutes in your entire week. We'll explore the value of huddles, how to conduct them and turn them into something you don't want to miss.

## 1) Ugh. Why do we have to meet?

That's a great question. It usually stems from weeks, months or years of ineffective meetings that people have endured in your office. No wonder no one wants to show up and participate!

- a) Implementing daily team huddles is an effective strategy to prepare physicians and practice staff for the day and maximize the quality and quantity of time that can be spent with patients.
- b) It's a time to check in, both personally and to prepare for the important work we do, taking care of patients.
  - a. Check in and just see how everybody's doing amongst the team. How are the kids? Anybody have a big test that day? Is school let out early? How's mom? How's everybody? How's everybody's personal life? Somebody might have something that they're worried about that day and they might be a little distracted. So, it's important for the team to develop trust amongst themselves and to make sure that everybody knows what's going on in each of their personal lives.
- c) In addition to making sure that the team members understand what's going on in each other's lives, it is a time to look at the patients that we're going to see that day and recognize whether a patient may need additional service or the team needs to understand something about that patient that isn't readily apparent on the schedule.

## 2) What are the most important steps you can take for an effective huddle?

- a. The first step is to get "buy-in." People have to answer the question for themselves "What's in it for me?" Unless you can answer that for everyone who is asked to show up to the meeting, they are not going to be that effective.
- b. Perhaps that is what is missing in your meetings today? It's more about you than them.
- c. Next, openly discuss the "why" or the value in the having the meeting and help them discover that what is in it for them is critical. They'll be prepared for the day, patients, the flow, and they will encounter many less surprises.
- d. In the end, their day will seem more managed, patients will be more satisfied and they will be less stressed and angry.
- e. Establish an agenda that does not change. If you are going to hold a meeting

regularly, do not spend time and energy to reinvent an agenda each time. Modify if you need to as the business needs change, but don't reinvent.

- f. Establish a routine. How long of a huddle? 5, 10, 15, 30 minutes? What day? Where? It's required, so make it so everyone can attend.
- g. Create team rules around tardiness and attendance. If it becomes a problem, confront, write-up, "punish" and/or dismiss. Huddles are part of your culture.
- h. Understand that at first it will be trial and error until you get the agenda, timing, and cadence figured out. It's ok.
- i. Make sure it is a two-way information sharing and everyone has the opportunity to contribute.
- j. Rotate the "ownership" of the meeting. Usually the receptionist has the pulse on everything, he/she is in a great position to lead the meeting.

### **3) What should we discuss at the huddle?**

- a. That will totally depend on how much time you have. But at a minimum you will want to discuss:
  - i. Hold a personal check in. What's going on in your world we should know about?
  - ii. What does the workflow look like today?
    - 1. How many patients? What types of patients?
    - 2. Special needs required? Wheelchairs, interpreters, etc.?
    - 3. Who needs to leave early? Who can stay late if needed?
    - 4. Will you need a larger room?
    - 5. Families?
  - iii. If you had more time:
    - 1. Employee/patient announcements
    - 2. What is working?
    - 3. What is NOT working?
    - 4. What should we be talking about today?
- b. The most successful companies use the huddle to speak to the importance of the team by communicating vision, clarity and demonstrating unity.
  - i. Communicate vision: a vision statement is often long forgotten on the wall somewhere. Huddles allow you to take parts of the vision, or at least use vision language, to ensure that the vision statement makes it from the heads of employees to their hearts.
  - ii. Provide clarity: many teams get derailed or sidelined because there is confusion regarding individual roles and how those roles play out to accomplish the vision. Unclear expectations and directives will destroy a team and will kill productivity, creativity and innovation.
  - iii. Demonstrate unity: unity of a team gets lost when star performers begin to rise, or when favoritism creeps into the office dynamic. A huddle should be used to level the playing field and contributions from everyone on the team should be noted. The huddle provides opportunities for

consistent recognition, support and direction.

**4) Tips for conducting successful huddles?**

- a) Huddles have the most impact when they are a regularly scheduled part of the day; whether that is daily, every other day, or at most weekly.
- b) Make the huddle interactive where every team member is responsible to share with the rest of the team. This may be difficult for some at first but it has great advantages.
- c) Put a time limit on the huddle and on how much each individual shares with the team.
- d) Allow different team members to lead the huddle and discover your up and coming leaders.
- e) Create spontaneity on the huddle by having guest speakers or specially events; for instance breakfast, watch a Ted Talk, show a YouTube video, play a game, etc.
- f) Huddles are usually most effective when they are scheduled first thing in the morning. It is a great way to discuss the various elements of the day and how the team may be impacted.
- g) To insure the proper communication of thought or idea, have a talking stick or other item that gets passed around so that the only person speaking is the person holding that item.

**5) Some of the benefits you will receive by committing to this organized daily regimen include:**

- a) better organization by planning the day instead of just letting it happen
- b) knowing patient needs in advance and seeing that the supplies and lab cases are there and in place.
- c) increased productivity by having the entire team aware of patients who have not scheduled and how they may impact flow.
- d) improved profitability by identifying unscheduled treatment and unscheduled patients
- e) improved team morale by deciding who needs help throughout the day and assigning a person to assist
- f) effective handling of emergencies because the clinical team is involved in selecting the best time
- g) keeping the team informed of daily production goals and reinforcing that it is a team effort to meet them.

Committing a brief 10 to 15 minutes of your day to the “morning huddle” can benefit your team and patients and can eliminate most of those surprises that bring chaos into a seemingly well-scheduled day.

