

## Conducting a Team Huddle

Huddles are a great strategy for teams who want to plan their day and stay on track as the day progresses. These are brief, stand-up meetings with key players on the team. Huddle participants generally include the Provider, the Medical Assistant, perhaps a nurse and possibly a scheduler.

The rationale for huddles is to identify opportunities to create capacity to do today's work today. This might mean:

- ❑ Identifying space on the schedule where more can be done during a particular visit
- ❑ Finding space to add patients when necessary
- ❑ Identifying an appointment that might require more than the usual amount of resources
- ❑ Talking to all members of the team to get a well rounded view of the day's opportunities and challenges and to facilitate communication.

Huddles are a way to anticipate and prepare for needs in advance. Here are some options.

### Daily morning huddle

#### *Preparing for the day*

- ❑ Review records and identify max packing opportunities ; immunizations, well child care, chronic disease management. Discuss with patient, prn.
- ❑ Consider the necessity of the visit - could it be managed over the phone. This is not the time to cancel the appointment but be aware of alternatives for future use.
- ❑ Is the most appropriate provider seeing the patient or is this an opportunity to create some capacity for the physician. Again, this is not the time to change the appointment but think about future applications. (case manager, etc.)
- ❑ Determine where additional appointments might be booked, if needed.
- ❑ Determine where additional help might be required for a particular patient.

### Daily afternoon huddle

#### *Staying current through the day*

- ❑ Evaluate add-ons to the schedule. Prepare using the principles listed above.
- ❑ Begin looking at tomorrow's schedule for issues and opportunities

There are a few simple rules for the huddle:

- ❑ Stand up- in a huddle we stand up. In a meeting we sit down. This "rule" emphasizes the brevity of the huddle
- ❑ Have someone other than the provider call the huddle
- ❑ Make sure the provider is in charge of the huddle.

**Weekly huddle***Look into the future*

- Check future schedules for opportunity.
- Consider alternatives to visits if appropriate. Consider phone interventions.
- Determine leverage opportunities in advance and plan to choreograph and hand-offs.
- Mobilize supply in advance and match to demand daily.
- Identify max packing opportunities - this huddle does allow for advance notice to the patient if necessary

We hope this is helpful. Remember this is a tool to help you through the day. You can anticipate and plan ahead and smooth the flow of patients with just a few minutes conversation each day. If you've not yet tried huddling, give it a try.