1.5 Conducting team briefings

Employees look to their managers to help them make sense of information that's communicated broadly, particularly:

- What's happening
- Why it's happening
- Implications for the team

This information is best delivered by the manager at a face-to-face or teleconference team briefing, so employees have opportunities to ask questions and share their opinions. The following case studies and expert advice share tips and templates that can be used by managers to conduct effective team briefings.

CASE STUDY

BANK OF AMERICA
Using Manager Huddles to share key messages

At Bank of America, the communication team wanted to help managers communicate important information quickly and efficiently at the start or end of a shift. The result was the Manager Huddle (see Figure 1.12, right).

This provides a framework for managers to convey important information to shift workers and enables a quick dialogue about a work-related change or event. The huddle template can either be completed in advance and distributed to managers or filled out by managers themselves to plan a team meeting.

SPEEDY COMMUNICATION

The huddle has a suggested timetable for speedy communication:

- Three minutes to open the discussion and tell employees what's changing, why it's important and what they need to do differently.
- Four minutes to clarify the topic, ensure understanding and ask probing questions to raise concerns.
- Three minutes to come up with headline-level solutions to concerns and identify ways to measure progress.
- One minute to review decisions made and confirm next steps.
- One minute to close the huddle by checking for final questions and expressing confidence in the outcome.

The huddle was designed for a specific purpose, but it's a flexible tool. The structure flows naturally from problem identification to potential solutions to accountability for implementing solutions. This format can be used for a discussion of any length. Also, the huddle doesn't have to occur face to face; it can work well over the phone.

BANK OF AMERICA: Using Manager Huddles to share key messages

Fig 1.12: *Bank of America's Manager Huddle*

TEMPLATE: MANAGER HUDDLE

Date: Date or timeframe within which huddle will take place.
Topic: Topic to be covered in huddle.
Coach: Leader who will facilitate huddle.
Associate(s): Associate(s) who will participate in huddle.
For more details: Printed materials, Web sites, other associates, etc. to explore for more information on the topic.
Desired outcome: Specific, expected behavior change(s) that associate will demonstrate after the huddle.

Step	Minutes	Information to cover
Open huddle Tell associates: • What's going to change • Why it's important to the associates and the company • What you want them to do differently	**3 minutes**	Cover topic: Make sure associates know what's changing in the company or what needs to change and why. Tell them, specifically, what they need to do differently themselves, if they need to get customers to do something differently, or both. Outline what will happen if they do change, and what could happen if they don't (the potential positive and negative impacts, to the business and/or personally). Tell them, specifically, how they and/or their customers will benefit from this change.
Clarify topic and challenges • Ensure associates understand what's being asked of them • Solicit issues, challenges or concerns about making this change	**4 minutes**	Ask questions to ensure all associates understand the issue or topic, and everything that was covered in "Open huddle" above. Ask questions to uncover any issues around confidence with skills/support or with motivation to make the change. Ensure all associates have a common understanding of related terms, procedures, products, policies, processes, etc. Ask questions to identify, from their perspective, what possible barriers exist to making this change. Also, ask questions to identify what problems they think their customers might have with it.
Develop solutions • Solicit ideas to address any issues, challenges or concerns associates have • Solicit ideas for measuring success with this action	**3 minutes**	The questions you ask should be focused and open-ended; avoid closed, "yes"/"no" answer types of questions, and avoid rhetorical questions or statements that do not allow the associate[s] to participate. Ask questions so associates generate possible solutions to overcoming each of the challenges and issues. Identify solutions to these challenges and ways of successfully making the change happen. Capture these ideas.
Agree on actions • Confirm and get commitment on what needs to happen next	**1 minute**	Decide, as a group, on specific actions to take and who is responsible. Ensure everyone's clear and on board.
Close the huddle • See if there are any questions • Express confidence • Wrap up discussion	**1 minute**	Express confidence in positive outcomes. Identify any additional next steps. Encourage associates to come to you with questions they may have later.