

Follow-Up Huddle Form

Bring the filtered list, not the whole report. Ten minutes — decide the next step, don't solve it here. **Check the carry-forward log on the back first.**

DATE

LED BY

DEPARTMENT / STORE

PRESENT

ESCALATIONS GO TO

START – END

REASON

1

Waiting on us?

2

Overdue?

3

Hasn't moved?

4

Needs help?

5

Can we close?

PRIORITY **F** On fire — a promise is broken or a customer is waiting now **S** Smoking — not broken yet, but it will be **W** Watch — under control; confirm the date
Use any three-level scale your team will remember — F/S/W, 1/2/3, High/Medium/Low. Pick one and keep it.

PRI	ITEM — CUSTOMER / ORDER / WO #	#	WHY IT IS HERE	OWNER	NEXT ACTION	REVIEW DATE	DONE
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐
							☐

THE FOUR FIELDS

STATUS → OWNER → NEXT ACTION → REVIEW DATE

No item leaves the huddle without all four. A waiting status still needs a date.

Carry-Forward Log

What we said we would do last time, and whether it happened. Anything still open goes on today's list.

REVIEWING THE HUDDLE FROM

TODAY'S DATE

REVIEWED BY

ITEM — CUSTOMER / ORDER / WO #	OWNER	ACTION PROMISED LAST HUDDLE	DID IT MOVE?	WHAT HAPPENED / NEW NEXT ACTION	NEW REVIEW DATE
			Y N		
			Y N		
			Y N		
			Y N		
			Y N		
			Y N		
			Y N		
			Y N		

MOVED SINCE LAST HUDDLE
_____ of _____

CARRIED A SECOND TIME

CARRIED A THIRD TIME OR MORE

ESCALATED

READ THIS FIRST
If fewer than about nine in ten moved, the huddle is not working. Fix that before adding items.

WORTH FIXING UPSTREAM

What keeps happening that we should fix instead of continuing to follow up on it? Take this to the weekly review.