

Follow-Up Huddle Playbook

A short manager routine for managing open commitments: keep the important items visible, make ownership and next steps clear, and focus the team on what actually needs attention.

What the huddle is for

The follow-up huddle gives a manager and a team a short, regular time to look at the few open items that need attention. It is not a status meeting, and it is not a review of every quote, sales order, work order, special order, claim, or task.

The purpose is to protect customer commitments, surface items that are getting stuck, remove obvious roadblocks, assign the next action, and close items that are finished.

The huddle is for deciding what happens next — not for solving every issue in the meeting.

Recommended rhythm

A busy OPE, powersports, marine, RV, equipment, or rental operation may benefit from a daily ten-minute huddle during peak season. A smaller store or a slower period may only need two or three huddles a week. Use the cadence that fits the volume and the season.

Added up, that is about an hour a week — ten minutes a day plus the half-hour weekly review covered at the end of this playbook. Say that number out loud when you introduce it. The first objection you will hear is about time, and an hour is a defensible answer.

One huddle or several?

In a business with more than one department, a single huddle rarely works. Service is opening the shop at eight and sales is not. Run them separately, by department, with the same five questions and the same ten minutes.

That leaves the handoffs — the item that belongs to parts and service at the same time — which is where follow-up fails most often. Give those a single owner rather than a shared one.

The department the customer is waiting on owns the item until the customer is no longer waiting, whoever else has to act along the way.

Before the huddle: filter first, then order

Do not walk into the meeting with a raw fourteen-page report and start reading from the top. Open your follow-up tool, saved DMS/ERP/POS views, CRM tasks, service lists, sales-order reports, or whatever else is available first.

If you are just starting, choose two or three high-value lists rather than trying to monitor everything at once. Then build today's working list in two steps.

- 1 **Filter.** Include items where someone needs to act, check, communicate, decide, or intervene. Leave out items that have a clear owner, a known next step, and a future review date that has not arrived yet.
- 2 **Order.** Put missed customer commitments and delays you control first, followed by items with no next action, items that have not moved, and then age or dollar value as additional context.

Leaving an item out of today's huddle does not close it or remove it from the operating report. It simply means the item is under control for now.

Know the four things that keep an item under control

An open item does not need to be discussed simply because it is open. It is usually under control when these four things are clear.

STATUS	OWNER	NEXT ACTION	REVIEW DATE
Where is it now, and what are we waiting on?	Who is responsible for making sure it moves?	What exactly needs to happen next?	When will we act or look again if nothing changes?

When there is a promised or expected event — a part arrival, an approval, a delivery, a payment, a manufacturer response, or a customer decision — record that date separately from the review date.

Reports to scan before the huddle

Report names vary by system. Look for the function rather than the exact title. The companion *Follow-Up Reports & Systems Guide* covers twelve of these areas in detail; these are the ones most huddles start with.

- **Open Sales Orders / Uncompleted Orders** — especially deposits or payments on file, promised dates missed, product available but not delivered, and orders with no recent activity.
- **Open Quotes / Outstanding Estimates** — especially overdue follow-up, no next action, or meaningful opportunities that have stalled.

- **Open Work Orders / Work Order Aging** — especially delays you control, no recent activity, authorization delays, or jobs past a promised date.
- **Awaiting Authorization / Estimates Pending Approval** — especially customers not yet reached and missed callbacks.
- **Completed Work / Not Picked Up** — especially units finished but not communicated, and missed pickup commitments.
- **Parts Received / Not Picked Up** — especially customers not yet notified or pickup commitments that have been missed.
- **Special Orders / Backorders** — especially missed ETAs, no current ETA, or customers who have not received an update.
- **Open Warranty Claims / Claims Aging** — especially claims requiring dealer action, returned or rejected claims, and claims with no movement.
- **Customer Tasks / Activities** — overdue, due today, no owner, or no next-action date.
- **AR Aging / Customer Account Issues** — missed payment promises, disputes, or questions you still need to resolve.

The five huddle questions

1 Who is waiting on us?

Start with customers or outside parties waiting on your business. Look for missed callbacks, sales orders waiting on delivery, setup, or paperwork, quotes waiting on revised information, service estimates not sent, received parts not communicated, warranty documentation not submitted, and customer-account questions you still owe an answer on.

2 What is overdue?

Review promised dates, next-action dates, review dates, pickup and delivery commitments, and tasks that have passed. The question is simple: what happened, and what is the next action now?

3 What hasn't moved?

Look for items that may not technically be overdue but have stalled: no recent activity, too much time in the same status, no next action, no owner, or an open sales order with customer money or product attached and no clear path to completion.

4 Who needs help?

Give employees a place to surface items they cannot move on their own: a trade approval, a manufacturer answer, a lender issue, an unusual customer situation, a parts escalation, a warranty decision, or a cross-department handoff. Assign the longer conversation for after the huddle.

5 What can we close?

Close items that are finished, declined, postponed, resolved, picked up, delivered, or otherwise no longer active. Record a meaningful outcome so the active list stays trustworthy.

Then sort what is left

The five questions build the list, and the number of the question that surfaced an item is worth writing down beside the note — it is the shortest way to record why the item is there. What the questions do not tell you is what to work first. Before you start down it, mark each item with what happens if nobody touches it today.

ON FIRE F A promise is already broken, or a customer is waiting on us right now. Money or a machine is in play.	SMOKING S Nothing is broken yet, but it will be if nobody acts: no next action, no owner, or the item has stalled.	WATCH W Under control. Confirm the review date and move on without discussion.
---	--	--

The labels are yours. Fire, Smoking, and Watch is one option; **1–2–3** and **High–Medium–Low** work just as well. What matters is that there are three, that they mean what is above, and that everyone uses the same one. A team running two scales is running none.

Age and dollar value inform the mark; they do not set it. A ten-day-old quote where the customer asked to be called next week is a W. A two-day-old repair on a commercial customer's only machine in peak season is an F.

If nearly everything is an F, the list was not filtered. A priority everything qualifies for is not a priority.

"No response after reasonable attempts" needs a number or every employee will pick a different one. Three attempts across two weeks, varying the channel, is a workable default. Set it wherever you like — set it once, for everyone.

Close every discussion with the item back under control

Before moving to the next item, make sure the four fields are clear again. If there is a promised or expected event, keep that date visible too.

THE FOUR FIELDS

STATUS → OWNER → NEXT ACTION → REVIEW DATE

A ten-minute huddle example

This is the Follow-Up Huddle Form, filled in.

Pri	Item	#	Why it is here	Owner	Next action	Review date	Done
F	SO 4412 Nash	1	\$2,500 deposit; unit in stock, setup finished; no delivery date	Dana	Call customer, schedule delivery	Today	
F	WO 8871 Ruiz	1	Diagnosed six days ago; customer not reached for authorization	Marcus	Call by 10:30; manager helps if no answer on second try	Tomorrow	
S	Claim 3306	4	Returned by the manufacturer for a missing document	Tina	Gather document, resubmit; 15 minutes after huddle	Fri	
W	PO 219 Elmore	5	Part received, customer notified, picked up yesterday	Dana	Close with outcome	—	✓

Pri — **F** on fire · **S** smoking · **W** watch. **#** — the question that surfaced the item. The two F rows get worked first.

One item is deliberately missing. A special order with a confirmed ETA, a customer updated yesterday, and a next check already scheduled did not make today's list — it is under control, and it returns on its review date.

Huddle ground rules

- Do not read every open item aloud.
- Do not solve long problems in the huddle. Assign the owner and move the longer discussion afterward.
- Focus on the next action, not on blame for how the item got there.
- Customer commitments come first when your business is holding up the next step.
- A waiting status always needs an expected date or a review date.
- Do not rank by age alone. Use customer impact, commitment, time sensitivity, and whether the delay is yours to fix.
- Record the decision while it is fresh: status, owner, next action, review date, note, or outcome.
- A handoff is not complete until the next owner knows the item is theirs and can see the history and next step.
- Close finished items so the list remains trustworthy.

Give “needs help” somewhere to go

Question four surfaces the items an employee cannot move alone. Naming them is only half the job. If there is no destination, the escalation stays in the manager's memory, which is the problem this playbook exists to remove.

Decide once who the next level is — an owner, a general manager, a regional contact, a manufacturer rep — and write that name at the top of the huddle form. Then treat every escalation like any other

item: it gets an owner, a next action, and a review date. The person escalating still owns the customer commitment until somebody else accepts it.

An escalation with no name and no date is not an escalation. It is a complaint.

The one number that tells you it is working

At the start of each huddle you are already checking what moved since the last one. Total it. Out of the items you assigned last time, how many actually moved?

If fewer than about nine in ten moved, stop adding items and find out why. The usual causes are few: the next actions were vague, the review dates were unrealistic, one person is carrying too many items, or the huddle is being skipped on busy days. All four are fixable, and none of them get fixed by putting more items on the list.

Count two other things while you are there: items carried a second time, and items carried three times or more. A single carry is normal. A third is not a follow-up problem — it is a process problem, and it belongs in the weekly review rather than tomorrow's huddle.

Weekly manager review: learn from the pattern

Keep the weekly review separate from the short huddle. The huddle is tactical. The weekly review looks for recurring causes, training needs, workload problems, and process changes.

What keeps happening that we should fix instead of continuing to follow up on it?

- The same customer commitment repeatedly becomes overdue.
- Items routinely stay in “waiting on parts,” “waiting on customer,” or another status without a review date.
- The same handoff between departments consistently causes delays.
- Open sales orders repeatedly reach the huddle because product is ready but delivery, setup, paperwork, or communication is not completed.
- Work repeatedly reaches the huddle without an owner or next action.
- Certain quotes, repairs, claims, or orders stall more often than others.
- A common outcome points to an availability, pricing, process, training, or communication issue.
- One employee or department is carrying an unreasonable number of open items.

Manager measures worth watching

Activity counts can be useful, but a high number of calls or emails does not necessarily mean customers are being taken care of. These measures tell you more.

- The share of last huddle's items that actually moved
- Open items with no owner
- Open items with no next-action or review date
- Overdue customer commitments
- Customers currently waiting on you
- Items with no meaningful activity for an unusual amount of time
- Open sales orders past a promised date, or with product available but no completion plan
- Recurring reasons follow-ups become overdue or stalled

Manager huddle card

WHO IS WAITING ON US?	Customer commitments and next steps you control.
WHAT IS OVERDUE?	Missed promised dates, due dates, and review dates.
WHAT HASN'T MOVED?	No recent activity, no next action, too long in one status.
WHO NEEDS HELP?	Escalations and roadblocks the employee cannot clear alone.
WHAT CAN WE CLOSE?	Finished, resolved, declined, delivered, or no longer active.
THEN MARK EACH ONE	On fire · smoking · watch — or whatever three levels your team uses
FOR EVERY ITEM	Status → Owner → Next action → Review date

The companion **ProfitEdge Follow-Up Reports & Systems Guide** shows how to turn the reports you already have into focused working lists for the huddle.

ProfitEdge Systems helps independent retailers and dealers improve profitability and operating performance through consulting, training, and intelligence tools.