

Heartbeat Ceremony Pattern

Name: Heartbeat

Overview: A team responsible for running an operation comes together frequently to quickly review core numbers that describe the health of the operation. The operation may be a business, home, non-profit, school, or any subdivision thereof.

Purpose: To revisit and share essential numbers and trends.

Preparation: Numbers shared are collected in advance and ready to be stated out loud during the ceremony.

Roles: Facilitator, Caller, Active Listener, Chart Maker

Structure: Open—Facilitator says, “Welcome to the *heartbeat ceremony*. Please report your numbers.”

Execute—Each caller in turn reads his or her metrics out loud, optionally noting trends.

Active listeners listen attentively as the caller reads his or her metrics. The chart maker plots certain preselected numbers on a visible chart or graph to make trends more apparent.

Caller says, “Those are my key metrics, are there any questions?” Listeners ask questions which the facilitator records, repeats, but the caller only answers if it is a question specifically clarifying the number or trend (not its cause or solution).

The ceremony progresses to the next caller.

Close—Facilitator says, “Are there any additional questions I should record?” Facilitator records questions while keeping discussion to a minimum. Facilitator says, “The *heartbeat ceremony* is now closed.”

Remnants (things left behind after the ceremony): Numbers, trends, unanswered questions.

This pattern is meant to be adapted, changed, and evolved to meet each specific organization’s unique needs and challenges. One item not yet included in the pattern template above are the elements of the *heartbeat ceremony*. These will be examined next.

Ceremony Pattern Language

A pattern language is a method of describing and sharing successful design practices. Architect Christopher Alexander introduced the world to the idea of pattern languages in his 1977 book *A Pattern Language*. The idea has since been used in several other fields and we propose a pattern language for ceremony.

The following is our definition of ceremony:

Ceremony is a purposeful ritual social interaction which completes an element of work, requires sacrifice, and rewards participants with positive emotional energy.