

Heartbeat Ceremony

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.

Participants (roles)

Facilitator, Caller, Active Listener, Chart Maker

Pattern (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.”

Product

All participants have heard the key numbers and trends.