

Huddle Observations are made using Alchemy Coach and Manager to document the topics discussed during a group huddle. Creating an observation for a huddle is easy and ensures that you capture the information and participants of a workplace huddle with ease. To begin crafting a digital huddle guide, please consult with your company's standard operating procedures or equipment documentation manuals. Once you have decided the subject for your huddle – follow these steps.



## Getting Started

**Only Silver Admins and higher** can create observations. Gold or higher can add users. Should you need assistance, please contact your company's Alchemy Administrator or Alchemy Help for more information.

**\*Please contact your Alchemy Account Manager for best practices and tips on managing admin profiles, users, etc.**

## Create Group

In Alchemy Manager, click **Users**, then **Groups**. In the bottom right corner, click the **+** button. When naming the group, be sure that you are using your worksite's agreed naming conventions. Consider the group to only consist of the employees in the department you regularly meet with and would participate in the group huddle.

## Example

Your worksite has 5 departments with which you meet weekly. In Alchemy Manager, you would need to create a group for each of these departments. Ensure that your employees are enrolled into their respective group and that each group is clearly labeled and identifiable at your Worksite.

## Create Observation

In Alchemy Manager, click **Activities**, then **Observations**. In the bottom right corner, click the **+** button. Be sure to utilize a strong naming convention that clearly makes these digital huddle guides stand out. We recommend starting with the word Huddle, follow by topic that will be shared and then worksite or onsite location. This will be the huddle's name in Alchemy Coach. By using Huddle at the front, searching for huddle observations would be easier as well.

## Example

Create a new observation for the topic of the huddles, and name it **Huddle: Ladder Safety, Worksite A**. This title outlines the topic and location, and other helpful identifiers for the Coaches who will be documenting these meetings. Consider starting with topics or specific locations in the facility that tend to have high infractions.



## Process

After successfully creating your groups and organizing your employees that you will be meeting with – collect your procedures, documentation, and other items necessary to craft your huddle observation. Remember, this is specific to the topic that will be discussed with the departments.

## Craft Observation

Proceed creating an observation, keeping in mind that you want this to help you document the topic of the huddle. Be sure to add detailed Coach instructions. For your observation questions, you can ask the Coach to disclose the topic of the huddle, outline the procedures they shared, refer to hyperlinked GMP's or SOP's, take pictures, and more!

## Example

For the **Huddle: Ladder Safety, Worksite A** observation you can include questions such as-

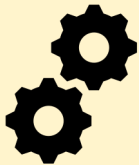
Question #1: Where there any infractions during the previous shifts? What information will be shared with employees during meeting?

Question #2: Are employees placing the ladder on a stable, leveled surface? Is the employee always maintaining three points of contact when climbing up and down ladder?

Consider adding open-ended questions that allow your Coaches to digitally document pressing topics before or after a shift with ease.

## Create & Subscribe

Once you have published the observation for the huddle(s), you can create a Learning Plan and Subscribe it to the Group/User(s) you created for these meetings. This is optional – please consult your Account Manager for details. Proceed to Alchemy Coach and manually sync your device to obtain data from Alchemy Manager.



## Execute

To perform the observation huddle, launch Alchemy Coach and manually sync your device to obtain data from Alchemy Manager. Search for the user(s) that will attend the meeting, and search for the observation huddle you made. Perform the observation. After submission, manually sync to ensure record retention. After syncing, in Alchemy Manager you can run reports over these digital huddle guides to see employee's performance, information shared, and even review comments and images taken by the Coach.