# Ep #114: The Case for Better Meetings: A Smarter Way to Move Legal Work Forward


## Full Episode Transcript

**With Your Host**

## John E. Grant

Meetings sometimes get a bad rap, and I understand why, but hear me out. I've been in a lot of meetings in my career. I've facilitated a lot of them, I've sat through a lot of them, and I think I've earned the right to say, a good meeting can be kind of amazing. The problem isn't meetings, it's bad meetings, and the solution isn't to have fewer meetings overall, it's to make your meetings better. Today I'll give you three examples from my recent work that show how much a well-designed, well-run meeting can accomplish and why real-time conversation is still one of the most powerful tools you have as a legal professional.

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If you're new to this podcast or you just want a solid grounding in what it actually means to run an Agile law practice, I recently wrapped up an 11-episode arc that I'm calling my Agile Attorney 101 series, which conveniently starts with Episode 101 of my feed. It covers everything from what it means to have an Agile mindset to practical tools like making work visible and managing your capacity, all the way to the strategic importance of designing roadmaps for your clients and for your team. I've gotten a lot of great feedback on the series, and Episode 108 in particular seems to have really resonated with people. But start with Episode 101 in your favorite player and work your way through from there.

Hey, everyone. Welcome back. So, last week in my conversation with Jordan Couch, we briefly touched on something that I thought I'd go a little deeper on today, and that is the power of in-person meetings for getting to better results. And Jordan's example that he talked about last week was specifically about working with the bar and both the board of governors and the committee meetings, and how working through things together in a room, even when it's messy, even if it comes to a result that maybe isn't the one that you preferred when you entered, ultimately gets to a better result than any one person's solo thinking could bring you going into the whole thing.

And for me, it's just another example, meetings get a bad rap, and I understand why they do, but I love a good meeting. I think that well-run, well-designed, and well-cadenced meetings are actually one of the most efficient ways to actually get to the result that you're looking for. There's that whole meme around this meeting could have been an email, and again, I get it. I get where that comes from. But I think the opposite is often true. I think a lot of things that are done via email or via Slack or Teams or this sort of asynchronous communication would have been way better off if you just scheduled some time to work through it in the first place.

And so today I thought I'd just give you three examples of things from my recent work life, work I'm doing with my consulting clients, with some Greenline customers, and then actually with a podcast listener that sort of illustrates how a well-designed, well-run meeting can actually have really effective results.

And this first example comes from some work with a customer where we were actually doing a retrospective, and I'm not going to dive into retrospectives, but these retrospectives are a really good tool for getting feedback and understanding progress against the strategic initiatives that you have as a team or as a practice. If you want the deep dive on retrospectives, I did a whole episode about them way back on Episode 7, although there are lots of episodes I've done where I've talked about them, so I'm going to leave it at that for now. But the interesting thing about this one is the feedback I got from sort of this one older, salty litigator, you kind of know the personality type, right? Pretty gruff, pretty confident, but a little dismissive of things maybe at first or certainly new things. And this was a person who was a little suspicious of all of the changes that we were working towards in terms of using Kanban boards, but especially setting up these agile cadence meetings.

And the two that we really implemented with this firm, in addition to the retrospective, are number one, the weekly planning meeting, which is where we number one actually review the progress we've made on important matters since last week, but then touch base using the Kanban board to move the matters forward this week or establish what we need to work on this week. And then number two, the daily stand-up meetings. And those are ones where I definitely get some pushback initially, right? This idea of a daily meeting, it feels foreign to a lot of lawyers and it feels like it's not going to work, right? It feels like it should be a waste of time. But in the retrospective, what I heard from this attorney was great.

And the specific question we were asking in the retrospective was relative to when we had started this work about six months ago, how are you feeling about the general productivity and the amount of effort that was going into moving these litigation cases forward? And this attorney when it came around to their time to talk said, I have to hand it to you, these weekly meetings, they hold them on Tuesdays, have really made a huge difference.

And I thought it was going to be this horrible thing where we were kind of recreating the old way that they had of working, which was, and I see this in a lot of firms, the sort of running down, I think in their case it was an exported Clio report of every open matter in the firm and they had to hit every single one, and it just was like pulling teeth. It was long, I think they usually were taking like two and a half or three hours, and he thought that we were just going to be doing that but more often. And what he said is that this weekly cadence, especially in the presence of the Kanban board, really made a difference. And then he went further than that and was like, the daily standups are fantastic. The 10 minutes that we're spending with these quick touch bases really helps make sure we're making progress and that stuff isn't falling through the crack.

So, in terms of the power of in-person meetings, these are pretty well-designed meetings, and in fact, I'll give you another couple of episode numbers, Episodes 51 and 52. In 51, I do a deep dive on the weekly planning meeting, and in 52, I talk about what is a well-run daily standup. And this firm is using those patterns, they're using those agendas. They're using those negotiated agreements about what we're going to do and not do in the meetings, and they're running really well. And I think the feedback we got in the retrospective really reflects that.

I will say, just as a quick aside and a quick plug maybe, those types of meetings aren't possible without having a Kanban board. The existence of this visual way of processing and understanding the work, part of why the traditional monthly case management meeting takes so long is that the tool set of using that Excel sheet or that report out of Clio or whatever your practice management system is a really inefficient way to convey information out to the team about where things are.

But when you have that meeting in the presence of your Kanban board, then you have this intuitive visual sense that everyone in the room can see about what the status is. And then if you're using one of the more advanced tools that show things like blockers or tokens or pushing a lot of other information visibly onto the card, then those are things that you don't have to talk about in the meetings. So, you can have these higher order levels of discussion in detail about what's needed without having to do the wheel spinning of getting everyone up to speed on what this matter is even about.

Now, the other thing that came out of this retrospective that was music to my ears is they actually have a pretty new attorney that was participating as well. So, they didn't really know what the before state looked like. They had only been in the firm for about a week. Of course, we're having them participate in the retrospective because it's so good in terms of an information transfer, a knowledge transfer. But in this case, the attorney was a full participant. And so, they talked about a couple of things. Number one, they had a career with other larger firms, including, I think at one point like a big Am Law 50 firm, and so they were coming into it with a before state for themselves, it just wasn't the firm's before state.

And what this attorney said was that they were really amazed and gratified and felt like they'd made a great decision to come to work for this firm because of how well-designed the systems were, right? They felt like they were able to get up to speed really quickly, they felt like they were able to understand the flow of the work and the way that this particular firm handles cases, and they felt like through the planning meeting and the daily stand up that they were able to really get up to speed and get to the place where they can meaningfully contribute to moving some of these matters forward, way faster than they thought they were going to be able to do and really thought that it was a much better way of working than they had in earlier parts of their career.

So, obviously I love the retrospective. It's nice to hear that the efforts that the firm brought me in to help them work on were working, that the tools that we put in place were working. That's all really nice, but also, I think the act of the retrospective and doing that convergence of people and having the meeting together to talk about what's going on is a good cultural thing. I think it's a good social-emotional thing, and I think we also yield really good information. I would have been equally interested to hear if some of the things we were trying weren't working because then that tells us what we need to stop or change.

And then the fact that the feedback itself was about these cadence meetings under the Agile umbrella, I know they work, I've done it with enough different firms, but it's always just good to get that and hear that this way of working and approaching coordination and collaboration is a really effective one, and it comes from meetings.

So, the second example I want to give of a group meeting going really well was actually with a litigation team and a pretty big one. I think there were seven attorneys in the room, all of whom have hourly rates north of $450 an hour. It was a 90-minute meeting. So, this was an expensive meeting in terms of like what the firm resources are doing, but I think the work we got out of it, the deliverables, and the shared understanding that we came to really made that an investment and not a cost.

And what was interesting is this is a room full of a lot of attorneys with some mixed backgrounds, right? Some were more experienced, some were newer. Most of them were relatively new to this particular practice. And so, they each had an approach and a way of working that had worked for them in the past, but we talked about and I think came to an agreement pretty quickly that there's some tremendous value in having consistent firm-wide policies, procedures, strategic objectives when handling this particular type of litigation.

Number one, as you heard me talk about in the 101 series, I love consistency, I love predictability, and so coming to this shared understanding about ways of working and approaches to work really helps with that consistency and predictability part. Number two, it was a little bit of a meeting of the minds. I mean, we had some really great experienced people in the room, and there was this fantastic cross-pollination that happened where someone said, oh, really, I hadn't thought about doing it the way that you just described that you do it. I think that's worth a try.

So, let me back up. This was not one of the typical Agile cadence meetings. It actually probably most resembled some of the policy and procedure meetings that I often facilitate with firms. I've talked about on this podcast before, my purpose-based policy template, and alongside that, I actually do have a meeting agenda for doing the groundwork of getting the information needed to create these purpose-based policies. I'll give you information about how I can share that with you at the end of the show.

Part of what we were trying to do here and part of why we had this meeting of the minds or this sort of brain trust was the thing I've talked about in the podcast before with this idea of figuring out what parts of your practice can be documented as sheet music and what parts need to be reserved as jazz solos. And we made it really clear up front that we're not trying to take the individual autonomy and creativity out of the practice, but we do want to create that consistency and predictability so that we can do load balancing, so that the paralegals and associate attorneys don't have so much cognitive load trying to figure out, oh, this attorney likes it done this way, but this other attorney likes it done a different way. We really wanted to come to this firm standard way of approaching sort of the early case setup in the litigation process, right? From intake really all the way through to receiving initial discovery requests was sort of the bookends of the conversation that we had.

But one of the things we did in the very beginning of the meeting was have this group discussion around why should we even think about coalescing on this standard way of practicing aside from the ones I just mentioned? And the team landed on three core goals within the context of the litigation itself. Number one, they wanted to move matters to an early resolution whenever possible as quickly as possible.

Number two, we wanted to accelerate our understanding of the actual facts on the ground, right? And that includes what the client tells us, what they show us in their documents, and then what the other side reveals through their pleadings and their responses to our initial discovery requests. Number three is they wanted to be in the driver's seat as to the overall dispute timeline, right? They wanted to keep the pressure on the other side so that they would be more likely to come to the table and come to a settlement as a way of both getting the resolution for the client and also reducing the overall cost of litigation for the firm's clients.

And getting to that early was important, right? And this was a whole group discussion thing, right? We had some debate, we had this very generative session in the first part of the meeting to come to these ideals and come to these objectives. And I would say probably half of the attorneys participated robustly, but even the ones that weren't necessarily part of the discussion, I think really benefited from hearing the different perspectives, the different point of views, and then we also made sure that they had meaningful opportunity to chime in, to ask questions, and kind of see where things were going in the room overall.

And then with those three high-level goals in mind, we talked about the process and the procedures for each of those things I just mentioned, right? The initial intake, the initial case evaluation, getting initial information from the client in terms of documentation, and then using all that to come up with a first pass strategy for how we think the case is going to go overall. Then from there, we wanted to also create a consistent approach to when we do and don't consider sending demand letters, sort of pre-litigation, having a consistent way of actually bringing the pleadings, and also a consistent way about requesting those initial written discovery requests.

And so, there was a lot that was on the table. We actually were, I think, really effective in the way that we could get to all of these topics over the course of 90 minutes. And what we came to were some pretty significant changes from the way that some attorneys had been previously doing some of those things.

And then of course, it's my job as a facilitator, as a consultant to sort of take that conversation and reduce it down to consistent policies, procedures, documentation, artifacts, whatever. But the thing that I knew and has proven out now, we're kind of a week since that meeting, is that the documentation and the artifacts are secondary because the real value, the real benefit from the meeting overall happened in the room. It happened through the debate and the discussion and the ultimately coming to this meeting of the minds, this shared understanding of what we should be doing and why, we still have a little bit of stuff around the how to figure out, but my work as a consultant is kind of like 90% done. Maybe 80%, but we've really have done the hard parts already.

And I think I'm already seeing this week from that firm that they have had some behavioral changes, right? They are thinking about the cases and their strategic objectives for the cases in a different way, which means that it is the meeting itself that is where most of the magic happened and the artifacts, again, they're important and I think for documenting things for people that weren't there and for future people, for the paralegals who weren't necessarily involved in this particular conversation, right? It's all going to be important, but a lot of the work is already done by having a well-run, well-designed meeting, if I do say so myself, to begin with.

If you want to go back in sort of the podcast feed, I did a full episode on this purpose-based policy idea all the way back in Episode 22, and then if you've been listening more recently, I talked about it in Episode 109 as well.

The third context where it came up was actually a random conversation. So, I have a local friend, acquaintance, colleague here in Oregon who also happens to be an adjunct professor at the law school and invited me to help guest lecture the adjunct class earlier this week. And we were talking afterwards about how he's actually never hired me as a consultant, which is fine, but I think has gotten a lot of benefit from the podcast and some of the other materials I put out. And he is using with his team a Kanban system to help manage the cases inside of his particular law practice. And this is an interesting one too because it's not necessarily a firm-wide initiative. He actually works for a pretty large law firm. It's just something he's doing for himself and the people he works with most closely because it just works, right? It helps make his work better.

But the topic we came to was this notion of work getting stuck and I was actually talking to him a little bit about Greenline, which is not the tool that he's using, and maybe he will someday. Again, I hope that he does, but it's fine if he doesn't, right? There's lots of tools that can work. But specifically we were talking about the client homework blocker and how it can be so problematic when you're under a tight deadline or you have other expectations about when you're going to get a chunk of work done, but you don't have all the raw materials you need because the client hasn't done their homework.

And so, I was just reiterating with him this technique that I've implemented with a lot of the firms I work with, and I will talk about it again right now, that is really effective at helping make sure that client homework doesn't become this sort of long-standing bottleneck that really prevents the work from flowing or the matter from progressing through to the next phase of work. And I've talked a little bit about these techniques before, once all the way back in Episode 15, which is about effective handoffs, and then again in Episode 35, which is about co-working sessions. And what I'm about to describe is a hybrid of both of those techniques.

So, the first part of it is when you assign homework to the client, you negotiate a reasonable deadline. My preference is to be as short as you can get away with. I love a three-day deadline. Maybe it needs to be five, maybe it needs to be a week, but we don't want things to languish because people, if they're allowed to mentally think, oh, this is something I don't have to deal with right now, then they clearly won't, right? They won't even start working on it until an actual due date is approaching, and that's not what we want. We want work to move forward. And as I've talked about before, if we give the client a three-day deadline, we give them an opportunity to renegotiate that deadline. So, could you get this back to me in three days? If yes, great, we have a commitment. If no, no problem, how soon can you get it back to me? And that how soon is a key part of that question.

But either way, at the end of that conversation, we should have a date upon which we should be able to rely to get the client homework back. Now, the newer part of this technique that I don't think I've talked about before on the podcast is once you have that date, you schedule a check-in meeting, maybe with you, maybe with an associate, maybe with a paralegal, but you put something on the calendar with the client either on that date or shortly after that date, and you use that meeting that is scheduled, right? It's going to be a real-time conversation.

It doesn't have to be in person, it can be a phone call or a Zoom. But the idea is that they've got a block on their calendar that is showing when that deadline is and that they're going to have to go face to face with somebody if they miss it, and also that's okay.

So here's the thing that meeting does is two scenarios that come into play. Scenario one is the client gets you their homework before that meeting, in which case the agenda for the meeting is pretty straightforward and the meeting itself might be really quick. It's kind of a review, it's a follow-up, it's making sure that the stuff the client got you is what you were actually looking for, answering any questions that the client might have. It goes pretty well. For some projects or some matters with some clients, you might be able to cancel that meeting entirely once they get you their homework. I'll talk about that again in a minute.

The other scenario is if the client doesn't do their homework, that's actually okay because then the meeting becomes a co-working session. Now, the key is you can't let them cancel the meeting, right? They have to keep it either way, and you actually probably want to message that up front that we're going to keep this meeting either way. But often times the reason a client doesn't do their homework is they actually haven't been able to wrap their heads around it. They have questions, but they don't even know how to formulate the questions well.

And so, that meeting becomes a place where they can ask questions, you can give them direction, and if you need to, you can just sort of sit there and I hesitate to use the word babysit, but I can't think of a different one right now. You can provide accountability partnership, let's put it that way, while the client does the actual work while you're on the Zoom or while you're on the phone.

Now, some of you are probably thinking, and I hear this from people in the real world, well, that seems like a waste of my time. Why should the client have to pay me to do this thing that they should be able to do by themselves? Good question, but here's what I know is it works. And I don't know if it works because it's that accountability partnership. I don't know if it works because they know the meter's running. I don't know if it works because they just like having their attorney and having the conversation with their attorney, and they feel more connected and like someone's helping them with their problem.

But whatever it is, having that co-working session, number one, people don't actually mind paying for it as much as we fear they're going to. And number two, it gets us what we need to move the matter forward. And at the end of the day, the client really wants their matter to move forward. Most clients don't like living with a legal issue. They want the legal issue to be making progress on its path to being done and over with and gone away. And so, I think that this, even though it might feel inefficient in the abstract, it actually is a really efficient, well-designed use of your time or your team's time if you do it this way.

And I think I'll kind of leave it at that. The thing that these three examples have in common is that they are a more efficient way of gathering information, transferring information, coming to agreement, coordinating our different perspectives and opinions, and even learning things, than if we were to engage in asynchronous email, chat-based, instant messaging-based, or whatever communication, right? You just can't beat the rapid feedback loop of an in-person or a real-time meeting if you're having it over the phone or over video.

And I'm not sure why we have this sense in American culture and specifically, I think in legal culture, that meetings are this horrible, inefficient thing. I think we tend to have something of a lone wolf mindset or an independent genius mindset maybe, where we assume we're better off thinking things through on our own schedule than going through all that hassle of number one, coordinating a meeting and number two, dealing with the messiness of human-to-human conversations.

But I think that attitude just misses how effective and how many cues we get and things we can learn from these in-person meetings or real-time meetings. But also, one of the core values of Agile is these rapid feedback loops. And when you're doing something in a real-time conversation, it's essentially an instant feedback loop. If you're ideating and something resonates, then you can feel it in the room, right? The room sort of amplifies it and builds upon it. If something falls flat, you know that too, right? It's like a comedian bombing in the club or whatever. And it sucks, right? It's that short-term gut punch maybe, but that's way preferable to like having a bad joke or having a bad idea or a bad strategy and carrying that really far down the wrong path before you figure out that oh, this isn't actually what we want to do.

So, I'll leave it at that for today. Don't be afraid of the real-time meeting. In fact, actively embrace the real-time meeting. Again, we have to be intentional, we need to make sure that we've designed them well, that we've got a good agenda, that we have a clear outcome or purpose for the meeting. But assuming you get those things dialed in, then there is no better way of getting to results quickly than bashing it out in a room or a conference or even a Zoom call and getting to that end result that is going to carry the thing forward without having the long delay of asynchronous communication handoffs.

# Ep #114: The Case for Better Meetings: A Smarter Way to Move Legal Work Forward

Something I mentioned a couple of times in today's episode is the role that a Kanban board plays in making matter management meetings and team check-ins work better. And I want to be a little more specific about that because I think it's easy to underestimate. The weekly planning meeting and the daily stand up I talked about, those meetings run well because everyone comes in with shared context that's already visible on the board. The team is working with the board on a regular basis, and then the board is up on the wall or on the screen during the meetings themselves. Matter progress, task assignments, important dates, blockers, client homework tokens, they're all right there. Nobody has to spend a bunch of cycles getting everyone up to speed on an individual matter. And instead, that time gets spent on the actual work of moving things forward.

And that's exactly what we built Greenline to do. It's a Kanban-based practice management tool designed specifically for legal teams. And one of the things I'm proudest of is how well it supports exactly this kind of meeting cadence. If you want to see how well it works in practice, head on over to greenline.legal and look for that book a demo button. I'd love to show you what we've built.

All right, that's it for today. A couple of quick things before I go. I mentioned my purpose-based policy template and meeting agenda during the episode. So, if you want a copy of that, shoot me an email at john.grant@greenline.legal and put policy template in the subject line. I am happy to share it.

And if you found today's episode useful, the best thing you can do is share it with a colleague or a friend who you think would benefit from a more agile approach to their legal practice. And if you could, you could also rate or review the show on Apple Podcasts, Spotify, or YouTube. That really does help people find this information.

As always, this podcast gets production support from the fantastic team at Digital Freedom Productions and our theme music is “Hello” by Lunareh. Thanks for listening and I will catch you again next week.