

Ep #51: Matter Management Meetings Suck. Do This Instead.



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John E. Grant

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John Grant: As the new year kicks into gear, I know a lot of you are busy setting goals and making plans and trying to figure out how to get everything done you hope to get done this year. But let me ask you this. Do you have a process in place to actually follow through on those plans week in and week out?

Today, I'm diving into an incredibly impactful habit that can help you and your team manage your capacity, prioritize the right work, and build a rhythm that keeps you out of firefighting mode and gets you feeling predictable and productive. It's all about creating a cadence for weekly planning and review for the work in your firm. And let me tell you, committing to this practice can really transform the way your firm operates and reduce your stress levels and sense of overwhelm around your practice.

You're listening to *The Agile Attorney Podcast*. I'm John Grant, and I help legal professionals of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve.

One of the core Agile practices that is sometimes hard for teams to implement and introduce in their teams is this practice of having feedback loops and actually closing the loop as a tool for improving your tools and systems and practices and behaviors inside of your team in ways that are gonna help you deliver your work more efficiently, more smoothly, and ultimately more predictably for yourselves and for your clients.

And I have to admit, right, one of the challenges with feedback loops is that people don't actually like them. They're hard. And part of the reason they're hard is that they tend to expose when we're engaged in suboptimal behaviors, right? When we need to change the way we're working, the way we're communicating, maybe the tools that we're using, etc. And so people tend to avoid them, right?

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We love to do the planning part of sort of the plan, do, check, act cycle, which is known as the Deming cycle, or plan, do, study, adjust is the way that I usually like to talk about it. But we're really good at the plan, we're reasonably good at the do, we really stink at the study and adjust parts of that PDCA or PDSA cycle. Which means we've got to put practices and behaviors in place that are going to almost force us to do that work on a regular basis. Today I want to talk about a very specific style of feedback loop that comes from the Agile methodologies known as the Weekly Planning and Weekly Review Cadence. These are two of sort of the four core meetings of Agile practices, the other two being the daily standup and the periodic retrospective.

I've talked about the retrospective a little bit. If you go back to episode 7, which is really all about the retrospective, I think that is a critical tool to use on a regular basis in your practice. I think most teams, I believe, should be doing them at least quarterly. Although at first, I'll settle for maybe twice a year. But if you haven't done a retrospective in a while, especially if you're listening to this podcast episode when it comes out in the early part of the year, I highly encourage you to do a retrospective with your team and then set up a cadence where we're gonna do those on a regular basis.

I've also talked a little bit about daily standups already. Some teams call it the huddle. Back in the scrum methodology, we would call it the daily scrum, but that was in episode 3. I'm actually gonna do my next podcast episode specifically about the daily standup. But the daily standup makes a lot more sense in the context of this weekly planning and weekly review meeting. And so I want to talk about that specific practice today.

Now I'm calling them weekly planning and weekly review. They don't strictly have to be weekly. I have had teams that I work with that will do this on an every two weeks basis, maybe even a little less often, although I think

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monthly, frankly, isn't often enough. So I'm going to strongly encourage that you try to do this on a weekly basis, at least at first, because I think getting into the habit of really doing this planning and then closing the feedback loop against that planning is something that takes practice. And so a weekly cadence winds up giving you and your team the ability to work on this.

And then as you get better at it, if you have the kind of practice that especially has longer matters, then you might be able to get away with moving it to an every two-week basis. But I, like I said, I wouldn't start there. I would start with weekly.

I also want to be really clear that this is not the whole practice review of all of the matters that are open in your practice. That's something that I know a lot of firms do. I feel like it's something that everybody does, even though they kind of hate it, because they don't know what else to do to keep balls from falling through the cracks, right? They're just, people feel like they have to touch everything on a periodic basis or else they're likely to miss something. And I get it. I think that's important. I obviously don't want you to miss things in your practice.

But man, those monthly or however often you do them, like open up the whole list of open cases and go through them one by one, those meetings are torture, man. Nobody likes them at all. And I think there are ways to get rid of that and replace them with something more effective. And really, it's the combination of ideally a Kanban board or some other visual system where you've got your matters on the board and you can see where they are in progress towards whatever their final destination is. Ideally you're also tracking important tasks and other sort of things about the matter in the Kanban card, and then you're using the board to help reflect back to you what are the matters that need your attention.

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And again, if you're using a Kanban board already, having that board up when you engage in the weekly planning and weekly review meeting is gonna be essential. Although I will say you can do this weekly planning and weekly review without a Kanban board, right? As I talked about back in episode 46, there are a lot of practices you can use from Agile and Kanban that will work even if you don't sort of have the perfect implementation of a full-on Kanban board or whatever.

Okay, so let's assume that you're going to try to implement this weekly planning meeting or maybe improve the one that you already have. Let's start with when you want to have this meeting. And I'm going to go ahead and sort of foreshadow the weekly review that I'll talk about in a few minutes. But one of the best practices, frankly, is to schedule the weekly review and weekly planning in the same session, right?

It's sort of a back-to-back thing, where regardless of when you do it, I mean, there's a pattern that some teams will do where they might do weekly planning on Monday and weekly review on Friday. But frankly, I think that's not the best way to do it. Right. I would say pick a day of the week and it doesn't have to be Monday. I know some teams that will do it on Mondays. I know other teams that will do it on Fridays. I have a lot of teams I work with that do it on Tuesdays or Wednesdays. It really doesn't matter as long as you're consistent about when it happens.

And at first I would schedule the whole thing, so both the weekly review and weekly planning, back to back to be about an hour. I think depending on the size of your team and also the volume of matters inside of your practice, it may need to be a little bigger or smaller. But over time, my hope and my expectation is that you'll be able to shorten these things, right? It won't take you a full half hour for each part of this meeting to get through what you need to do, but you're going to have to work up to that.

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You're going to need to do and take the time to actually get the meeting right. Understand how you and your team are working well together around it. And then I think you can experiment with trying to shorten it maybe to 20 minutes per section or eventually 15 minutes per section, as opposed to needing a full hour to complete both halves of the meeting.

In terms of who should be at the meeting, again, I'm assuming that most of my audience here is a part of a small team, so maybe anywhere from three to 10 or even 12 people. If you are bigger than that, then hopefully already you've sort of split your practice into a couple of teams. If you haven't, maybe eventually this will be a catalyst to help you do that. But I would say at first, sort of regardless of the size of your firm, unless you're 25, 50, 100 people, I would suggest that you have everybody on the team participate in these weekly review and weekly planning meetings.

Again, over time, I think you can get to the place where maybe not everybody needs to participate, but in the early going, I think it's important to, number one, build familiarity with the process to make sure that everyone is contributing in a meaningful way and make sure that you as the team leader or firm owner are really leveraging the people on your team and their eyes and ears and understanding of what's going on in your practice are brought to the forefront because a lot of times they're gonna have perspective on the work that you simply don't have.

What I don't want is to be in this world where just the leaders or maybe the attorneys or whatever are sort of setting the plan for the week and then casting it down from on high to the team where they're just sort of expected to obey their marching orders, right? That's not what we're going for. We're looking for engagement, we're looking for participation, we're looking to really do this work together as a team.

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Now I'm going to switch over and I'm going to talk specifically about the weekly planning meeting at first. And the purpose of the weekly planning meeting is to set the team's priorities for the week. Specifically, we want to set the team's priorities relative to your finite capacity to deliver work.

And I'm going to talk yet again about episode 3, which I think is one of the most important ones for you to listen to around the honest reckoning with capacity and its close cousin, the brutal assessment of priorities, right? We all have a finite amount of time, attention, and energy that we can devote to doing the work of our law practice. And the biggest challenge that most practices have is that they are operating over capacity. They have let too much work into their system relative to their ability to deliver that work in a smooth and predictable way.

And really, the main purpose of this weekly planning and weekly review meeting, yes, it's to get work done, but it's also to help you determine what that actual capacity is, because that's the thing that is going to let you be more accurate about how you prioritize work and let it into that finite capacity as you're going through your week.

So again, the purpose of the weekly planning is to set the priorities for the team's work this week. And specifically, I want to identify the cases or matters, or maybe the internal projects that absolutely positively must make progress this week.

And I often call this the hot list. Now the hot list can be any number of matters and it actually should be a little bit relative depending on how much work is needed. But I think it's a good practice initially to shoot for somewhere between five and 10 matters or projects that are gonna make it on the hot list. And I think actually capping it at 10 is a really good practice.

Now that's not to say that some weeks you won't go over. And in fact, again, if you're already in this world where your practice is over capacity,

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you may need to have 12 or 15 different matters on the hot list at first. But we really should be working to get it down. Right, that's part of the roiling boil that I sometimes talk about. If you've got 12 or 15 matters on your hot list, depending on the size of your team, of course, but that's a lot. That's a lot of different things that you need to keep track of and make progress on over the course of a week. I think that you really want to get it down to that gentle simmer in that five to 10 matter range.

What's important is just identifying the matters that need to make progress isn't enough. You also want to be really explicit about what progress needs to be made. The thing I really want you to avoid is statements like, oh, I need to work on the Adams matter, or I need to make progress on the Jefferson matter, right? That is not going to get it done. I want you to be really clear that I need to finalize my pleadings and the initial discovery requests, or I need to finish the first draft of this contract, or I need to get the final contract to opposing counsel for review. Whatever it happens to be, I want you to be really explicit about the deliverable that you need to get to, not the effort that needs to be expended.

The other thing that I think can be really useful and maybe essential in building the hot list is to work with your team on coming up with some sort of express criteria that qualifies a matter or project for going on the hot list. And the thing here is not everything that needs work necessarily needs to be on the hot list, right? There are gonna be lots of different things inside of your practice that you're gonna have to devote little amounts of your capacity to.

And I wanna get away from a thing that I see sometimes where someone's like, oh, well, I need to call this client, therefore this case should be on the hot list. Those little check-ins don't necessarily qualify it for high priority activity. In fact, one of the things that I really want to do over time with a team is be clear about having a finite number of things on the hot list so that once we're sure that we're going to get those things done, we can sort

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of normalize doing work on all the rest of the matters that are inside of your practice.

So again, just because you intend to work on something doesn't mean that that matter is a hot list matter or that project is a hot list project. We want it to be really clear that, oh, there's a trial or a hearing coming up in the next two weeks and there are outstanding tasks that need to be done to prepare for that court appearance. Or there's going to be a meeting with opposing counsel about a contract negotiation and there are specific things I need to do in order to be ready for that meeting. These are the objective criteria that will qualify something for the hot list.

I don't want to get in this place where you and the members of your team are sort of discussing your various opinions about what needs to be worked on, right? I want to try to ground it in something that is explicit and measurable so that you can have a robust conversation around it, as opposed to resorting to, you know, this thing you sometimes hear as the HPPO approach, which is the "highest paid person's opinion", and that that's the one that ultimately gets the most attention.

Okay, so as we go through this meeting, right, this planning part, we wanna set the hot list and then we wanna make sure we're keeping track of it, right, and that can be an actual list in a Word document or a Google Doc. If you're using a Kanban board, then I think that can be a great use for the prioritization feature of most software-based Kanban tools. If you're using a physical Kanban board, you might have a particular sticker or token that you put on a card to designate it as part of the hot list. There's a number of ways to do it, but it's really important that we keep track of what are the matters or projects that we have designated as being hot list items for this week.

We also want to keep track of what are the specific things that need to be done so that we can consider it either no longer hot or at least that we've

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done the most important things that we needed to do this week even if we know it's going to be hot again next week.

And you can do that by indicating them in the card description. You can flag certain tasks as being ones that need to be accomplished, either by setting due dates or assigning them to certain people or marking them with an iconography. It kind of depends on what the capabilities of your software tool are. But the important thing is, again, we know what's on the hot list, we know why it's there, and we know what needs to happen in order for it to be satisfied for this week.

Now, as I'll talk about next week, the key from here is to go forth and do the work. And I guess I'll highlight one other sort of thing I want you to avoid in this meeting is that this should very clearly be a planning meeting, not a working meeting, right? There is a phenomenon, and I get it, it's normal, that as soon as someone makes mention of a case, then all of a sudden your brain wants to start working on that case, and I want you and the members of your team to really resist that urge. This is a planning meeting, not a working meeting.

If you need to have a working meeting, schedule it for the week. Find the people that need to do the work, including if it's just a single person. You should be thinking about putting some calendar blocks on your schedule to make sure that you're preserving enough of your capacity to get these hot list items done. But we're doing the work during the week, we're not doing the work in the meeting.

Okay, so I'm gonna flip over now and I'm gonna talk about the bookend, which is the weekly review meeting. And the weekly review meeting, again, it probably is going to take you about half an hour, give or take, at first. Eventually, I hope that you can shorten this down once you get used to the flow of it and sort of establish some norms and practices inside of your team.

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But the main thing on the weekly review meeting is to just review last week's hot list and kind of objectively go through and say, did we accomplish all the things we needed to accomplish on this matter, yes or no? And when the answer is yes, we should celebrate that, right? And I'm not necessarily saying we need to have like cake and fireworks, but we wanna make sure that we're creating a positive feedback loop that rewards the completion of the things that we need to complete, right? Even if that's sort of, you know, yeah, that's the job, I get that. But creating an environment where we celebrate success, even if that success is kind of supposed to be normalized, I think is a good thing.

But frankly, if you're already over capacity in your practice, the more likely thing is that you're not going to have gotten everything done that you thought you were going to get done last week. And again, partly this is because of the optimism bias. We will often bite off more than we can chew because we think that our capacity is bigger than it is. And so when that happens, we're using this weekly review to reflect back and give us information about what our actual capacity is.

The other thing that is really common with teams is you set that weekly hot list, and then you don't follow it. You work on whatever you feel like working on or whatever sort of feels like it needs attention as opposed to using that weekly planning hotlist as your and the team's actual guide for how you behave during the week and how you apply your finite capacity to all of the various demands that you have.

And again, I'm going to talk about this a little bit more in the daily standup because the daily standup should sort of be these check-ins to make sure that we're sticking to the hot list. But even so, in the early going, it's really easy to deviate, right? An email comes in, a new client calls, something comes back from a matter that seemed like it was stale and you're like, oh my gosh, we can finally make progress on this one. Whatever it happens to be, it's really normal and natural to sort of deviate from that hot list that we

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create in the weekly planning meeting, but we want to try to catch ourselves.

And so the, again, initial purpose of the weekly review is to make sure that we accomplished what we said we were going to accomplish. But then if we don't, we want to try to diagnose the problem and get to an agreement around the team about how we're going to do better next time. This is not about finger pointing, right? I want to make sure this is not micromanagement. This is not accusation. This is about accountability partnership.

We're all human. These tendencies come in for everybody. We want to make sure that people have a certain level of psychological safety and, frankly, the permission and ability to speak up if they see someone else engaging in a suboptimal behavior and point out what's happening without necessarily being, and you're a bad person for doing this, right? This is all very human stuff.

So the agenda for this weekly review meeting is to just go down sort of item by item, the things on the hot list. Did we get it done? Yes or no. If not, why not? What did we miss when we were planning? Did we misestimate? Did we overcommit? Whatever it happens to be. And then we sort of take that into next week's planning meeting, having completed this feedback loop so that we can make better choices going forward.

And I'll admit, there's a chance that the first few times you do this, it's going to stink. You are not going to like it because these feedback loops are painful, right? Holding up the mirror and like, oh my gosh, yes, I am over committing. I can't figure out how to stop doing it. Just acknowledging and addressing the problem is the first step and then resolve to try something, whether it's calendar blocking, whether it's turning off your email while you're doing the deeper work on the things, right?

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Whatever you need to do, maybe it's agreeing with each other that you're going to not interrupt so often, not so many office flybys or emails or Slack or chat messages, whatever it happens to be, you will eventually sort of dial in some practices and some agreements with each other that are gonna help you support each other in getting the work done that needs to get done.

Okay, so let's tie this back to some specific takeaways. So number one, you're gonna need to schedule this meeting. Schedule it for an hour.

I would not do it at 9am on Monday. That's too soon. So I think if you're going to do it on Monday, I would do it mid to late morning at the earliest early afternoon works very well, or even not having it on Monday is just fine. A lot of teams like to have them on Tuesdays or Wednesdays in the middle of the week. Other teams like to have them at the end of the week where you sort of review what you've done for the week while it's fresh. You sort of make your plan for next week and then you can set off into the weekend not having to worry about doing catch up or pre-work, knowing that you kind of have your plan for next week when you come into the office and are ready to go.

Number two is to involve the whole team, really give them a voice, make sure that everyone is clear that the purpose of this cadence, this feedback loop is to improve and to improve together and to provide accountability to each other so that the whole team is improving. It's not impossible that over the course of this, you're gonna find people that are consistently not meeting their commitments, not holding up their end of the deal for the team. That's something that you can deal with separately, right? It'll daylight in these meetings, but you don't necessarily need to address it right away in these meetings.

I think the camaraderie and the team accountability will help sort of move people out of some of their own sort of individual poor decisions. For most

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people, eventually you may need to deal with some things outside of this meeting and you may even have some personnel problems, but that's not really the primary purpose of this meeting is to like root out the non-performers. It's to really get everyone performing at a higher and more consistent level together.

Number three, I'm going to encourage you to stick with it. Like I said, they're going to kind of not feel great at first. It'll feel good to have a plan from that weekly planning meeting, but when that plan collides with the reality that you've probably already got your practice over capacity it's not gonna be great at first, but it is that feedback loop that will help you sort of make better decisions about whether you need something like an intake pause, whether you need to delay commitment for certain things. You said that you would get it done by x date. But really, now that you're doing this on a regular basis, you realize that you need to call that client and ask for an extension or otherwise let them know it's going to be y or z before we can get this done.

Over time, if you do it consistently, then you're going to be a lot smarter about how you manage your commitments inside of your capacity to deliver them, and these meetings will get easier.

That's it for today. As always, if you have any thoughts or questions, please don't hesitate to reach out to me at john.grant@agileattorney.com. If you enjoy the podcast, it helps if you go into either Apple Podcasts or Spotify and leave me a rating and even a review.

This podcast is produced by the fantastic team at Digital Freedom Protections, and the theme music is the song "Hello" by Lunara. Thanks for listening, and I'll catch you next week.