

Ep #52: Making Daily Standups Work in Your Law Practice



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John E. Grant

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John Grant: Last week on the podcast, we talked about weekly planning and weekly review meetings as essential tools for establishing a cadence and a set of feedback loops that will put your law practice on the path to continuous improvement. But a week is a long time between course corrections. So today I'm gonna share how implementing a daily standup meeting can dramatically improve your team's performance and help everyone get better at understanding their actual individual capacity, not that optimistic fantasy of our good intentions about capacity, and then start working within that capacity to deliver work for our clients.

I'm going to explain why this 15-minute investment pays massive dividends, even though it's a practice that probably gets the most initial pushback when I try to introduce it with legal teams. I'm gonna give you some of the theory and the rationale behind the daily standup, some pitfalls to avoid, and then some specific techniques to make your standup meetings really effective from day one.

Ready to become a more agile attorney? You are 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. Let's go.

So this episode really goes hand in hand with last week's episode around the weekly planning and weekly review meetings. I really encourage you to go back and listen to that one first. But if you don't, or just to refresh, right, there are a couple of things about that cadence of planning and review that are essential to improving the predictability and the productivity of your law practice.

And I think the most essential one is this notion that you are creating a feedback loop. And it's these feedback loops, and specifically the closing of feedback loops, that is going to drive better and better behaviors, better and better understanding of how work gets done inside of your law practice.

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So I really think that consistency is key. As I said last week, there are things about closing the feedback loop that are inherently uncomfortable because the reality is you're not always going to do the things that you intended to do, right? The optimism bias is a very real human cognitive bias. And part of what we're trying to do with these cadences and these feedback loops is to reset our own self-perception about what our capacity is and then do that with the entire team so that not only is each individual on the team doing a better job of understanding their personal capacity, it is also getting to how the personal capacity of each person rolls up to the overall capacity of the team.

And as I've said before, the dominant sort of situation of law practices that I work with at least, and I think this is true for way more law practices than maybe the industry in general sort of lets on, is that you are probably already over capacity. You probably have already committed to more things than you can reasonably deliver on time with the tools and team and systems that you have in place right now.

And while we definitely want to grow your capacity, and I understand that a lot of people want to grow, they want to scale, they want to ramp up. But I'm here to tell you that the best way to sort of improve the productivity of your law practice overall is to work within your existing capacity first, because it's the fact that you're over capacity that's actually causing a lot of your delivery problems and that's Little's Law some of the things we've talked about back in episode five and then again in episode 36 if you want to revisit a few of those.

So as I've said before, one of the unofficial slogans of the Kanban method is start less to finish more. And what the weekly planning and weekly review meetings are meant to do is to limit the number of commitments you have at the same time, right? The number of balls you have in the air or plates you're spinning on poles, whatever metaphor you want to use, so that you can get away from doing so much multitasking and get closer to monotasking, which is going to make better progress on each of the

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matters you've got in flight or each of the projects you've got going and get them to that natural resting state.

One of the side effects of the weekly planning and weekly review cadence is that you're going to naturally want to commit to fewer things. We're going to try to get your intake and your scheduling to a place where you're feeling like you really are operating inside of your capacity as opposed to really having to sort of have all these things going on at the same time.

So the problem with the weekly planning and the weekly review is that that's a lot of time in between feedback loops. And if you're waiting a week at a time to sort of steer the ship, you can kind of go pretty far off course in that period of time. And so the complimentary tool that is one of the, you know, sort of core four practices out of the Agile methodology is the daily standup.

And this is the one that I get the most pushback from, from legal teams, where there's almost a natural inclination to say that this is a waste of time, that I don't need to be checking in. I'm a smart person, my team knows what they need to do. This idea of getting together once a day to talk about our work seems like overkill, or wouldn't I be better off just doing the work instead of taking this 15 minutes or so to sort of get together and kumbaya or whatever.

And you know, my response to that is, I guess, twofold, right? Number one is I've just seen it time and again that teams that implement this daily standup cadence and practice wind up outperforming teams that don't, right? Full stop. It just works better because you're making those little course corrections.

The other thing, if you're still reluctant or if people on your team are reluctant, then I'll sort of throw out the suggestion that I use anytime I encounter reluctance is let's run an experiment and find out, right? We don't have to commit to a daily standup for the rest of our lives. Let's

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commit to a daily standup for the next two weeks. And we'll check in after two weeks and see how it's going, whether we feel like it's effective, what we might want to do a little differently, what we might want to change, or, you know, scrap it entirely. I don't think that's likely, but it's not an impossible outcome, right? It may be that the daily standup doesn't quite work for you and your team. I think it's going to.

So what's the purpose of the daily standup meeting? Number one, it's about feedback loops.

And so what we really want to do is get into a cadence where we say, okay, this is what I'm going to commit to accomplishing in the next 24 hours, and then we come back the next day, and you kind of gotta be there with the rest of your team and be able to admit whether you actually accomplish those things or not, right? That is important, being able to close the loop. The number one thing that you're gonna find in the early goings of a daily standup practice is that people commit to too much. That's the optimism bias.

And so we're using the daily cadence as a feedback loop to get all of us to that honest reckoning with capacity so that we're really committing to things that we're very sure that we can deliver as opposed to over-committing or occasionally under-committing. I think that can be a problem sometimes as well. Part of what that process of making these daily standup commitments does is help us protect ourselves from shiny object syndrome.

And I talked about this last week as well, but you know, there's always going to be things that come in over the course of a day that are going to tempt us to turn our time and attention, our finite capacity, to something that is new and shiny, right? The purple squirrel, whatever. And having this cadence of making this daily commitment and knowing that you're going to have to get back with your team tomorrow and sort of report back on whether you delivered those commitments or not helps protect you from

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shiny objects and those interruptions that might otherwise distract you from getting the real work done.

One of the other purposes, and this is actually really important, it is something that maybe gets underutilized at first but I think it's important to make it part of your process, is that this is a personal check-in, right? We are operating with human beings, we're operating at a human level, you know, we can use this daily check-in to, you know, make sure that we know how people are doing, how they're feeling.

One of the things that I actually love is while the standup is inherently sort of a description and a statement of someone's personal capacity on a daily basis, right? Their sort of practical ability to get work done. One of the behaviors that a couple of my firms use, and I'll shout out to Richard Hoare and his firm, right?

We did an interview a few weeks ago on the podcast, but his team has an express subjective capacity question about how individuals are feeling about their ability to do work on that day, right? Are they operating, you know, sort of firing on all cylinders, or are there things in their lives that are maybe dragging them down a little bit? And it takes a lot of psychological safety, it takes a lot of trust. It isn't something that happens overnight, but one of the things I love about working with Richard and his team is that they've really worked on that together.

And so, you know, people feel comfortable saying, you know, yeah, I didn't sleep well, or I got this other thing going on in my life, and it's pulling at my mental capacity, and so I might be a little off today, and that's okay. The last thing for now that is a purpose of the daily standup is that we want to bring dependencies out into the light, right?

We want to make sure that we understand whether it's a roadblock or a dependency, right? If one person's work is dependent on somebody else's or if one person's work is going to create an obligation for somebody else,

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we wanna know that that's the case or that that obligation is coming down the pike because it's going to impact how people sort of plan for the rest of their day or the rest of their week.

And I've said it before, but the discomfort is part of the power of this meeting. And I'm not saying that I want it to be an uncomfortable meeting. It should be primarily a very comfortable meeting and we should be getting increasingly to a space where everyone feels comfortable both making the commitments and then reporting back on how they did relative to those commitments.

But both the positive feedback of having met the commitments and the sort of little stress reaction of, "oh crap, I didn't actually get this done." They're both powerful because they both are driving behavioral change in the direction we want to see, which is working within our actual capacity.

I also, I want to talk just for a minute about some connected practices that you know you can do a daily stand up or daily huddle a daily scrum if you're really kind of going with the old school Agile terminology you know they work on their own but they work better if you're using it in conjunction with some other things.

And the first one again that we talked about last week is the weekly planning and the weekly review. And specifically when you create that hot list in the weekly planning meeting we want that hot list to be front and center for each of your daily standups along the way. We want to be making sure that we're using the accountability and the visibility of the daily standup practice to make sure that we are chipping away at those hot list items, and specifically the deliverables that we identified when we created the hot list to make sure that those matters are no longer hot, or at least the things that are hot this week have been accounted for.

Another connected practice is using a Kanban board. No surprise coming from me, but if you are using a Kanban board already, then you definitely

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want to have that board available and open. You know, most teams aren't using a physical board anymore, but traditionally you would actually hold the stand up in front of your whiteboard or Kanban wall where the Kanban board exists, because that's the context that tells you where all the work is in the process and how you're gonna move it along in that process.

If you're doing the standup virtually, I would suggest that someone have your Kanban board up on a screen share, assuming that you've got a digital board. If you're doing it in person, then hopefully you've got a conference room or an office or something with a big enough monitor that you can bring a board up and have it there in the room when you're having the standup. Because I think that context, right, the overall caseload of your practice needs to be there, needs to be present when you're having these discussions.

Another connected practice is the practice of calendar blocking or sometimes calendar bucketing. And I think I'm going to do a deeper dive on this concept of calendar blocking and calendar bucketing in next week's episode. But high level, if you're going to commit to doing a chunk of work, you'd better be willing to commit a chunk of time on your calendar to doing that work. The practice I run into over and over again, and I actually had a conversation with one of my clients about this just yesterday as I'm recording this podcast, is that we're always willing to put meeting times on our calendar, whether we're meeting with clients or other people, but we don't tend to use our calendars to schedule our own time to do the delivery work that we need to do in the practice.

And I think that using your calendar to show commitment to blocking off some of your capacity and then using that capacity to deliver a certain chunk of work is a really effective practice because it helps you again visually see what your capacity actually is and how it's being taken up in the day. It also makes you protect a certain chunk of your capacity to do those things that you've committed to in the daily standup.

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And the last connected practice that I will mention for now, and this is sort of related, but a lot of my teams find it really useful to schedule a deep work block where sort of everyone on the team is committing to spending 90 minutes or an hour really focused on churning out the work right after the daily standup.

So you know, depending on when you're having your standup, making sure that as a team, as a firm, we're going to protect each other's capacity and protect our own capacity right afterwards so that we can dive in and make substantial progress on our commitments for the day right out of the shoot. And that then makes it more likely that we're gonna meet those commitments.

All right, so how do we actually run a daily standup? So number one, it's really important that you have the standup meeting at the same time every day. And I actually think it is a good idea to not do it first thing in the morning.

I know some teams that do for teams that really like to make sure that people are sort of in the office at a certain time or whatever, scheduling that stand up at 9am can sort of be a good way, I guess, to make sure that people come in. But I think in general, I prefer to have it sort of mid-morning, maybe 10 a.m., maybe 10:30.

A lot of teams I work with have it very successfully in the early afternoon. So maybe right after lunch, 1:00, 1:30, something like that. Whatever it is, make it consistent, right?

Schedule it on the calendar, everyone is invited, and everybody's expected to show up. And obviously in a law practice, not everyone is going to be able to make every meeting, right, depending on your practice. You might have court hearings, you might have client meetings, you might have other things that come up. But in general, we want to really protect that time and try not to schedule client meetings for that time. Try not to schedule, you

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know, phone calls with opposing counsel or whatever. We really want to protect the standup time and hold it sort of sacrosanct so that we can make sure we're using that daily commitment cadence.

Also, we want to keep the stand up meeting itself short. Now, I'll talk a little bit about what the duration can be. And then I'll also talk about maybe some other connected practices that would happen on either side of the meeting. But at most you want this meeting to be 15 minutes. And frankly, I think 15 minutes eventually is gonna be too long, depending on the context of your team. And so my general rule of thumb is that the duration of the meeting itself should be one to two minutes times the number of people on the team or the number of people in the room.

It's okay to vary it somewhat, especially if you're a remote or a hybrid team. It may be the only time on a regular basis that you're all getting together. And so having it be a little bit longer, maybe five minutes of chit chat or announcements or check-ins before we get to the standup portion of the meeting is okay. And obviously if you're in person it's okay to do that too, right? We want to use it to sort of help with team building and camaraderie and all the rest.

Different people are going to respond to it in different ways, right? Some folks are going to be impatient about wanting to actually get to the work. And so that's one of the reasons we want to keep it short. One of the things that I find can actually be helpful is to schedule a block of time that's maybe 30 minutes, but we're not going to use all 30 minutes for the standup.

And something I've seen work well is if you're gonna schedule the block of time, let's say at 10:30, the standup itself might not start until 10:35, and we're gonna reserve that first five minutes for people to do individual planning so that they come to the standup knowing what they're going to talk about, knowing how they did relative to their commitments yesterday, knowing what they're gonna do today, right? So the standup itself is actually not a planning meeting, and it's definitely not a working meeting. It

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is a check-in. It's a quick sort of accountability partnership thing, and it's meant to be quick.

So people should come to the standup prepared. They shouldn't be figuring out what they want to do when they get to the stand up. And so once you actually start the stand up portion of the meeting, there's sort of three traditional questions from the Agile method that we would ask each person, right? And we're going to go around the room. Everybody speaks, everyone needs to check in.

And the three questions go like this. So the first question is, relative to the commitments you made yesterday, how did you do? Right? This is the feedback loop, the closing the loop part of the meeting. And obviously the first time you have a standup, you're not gonna really be able to answer that question because you didn't have a meeting yesterday, but for everyone going forward, that's the key piece. So yesterday I said I was going to do X, Y, and Z. I was only able to get to X and Y or no, I had a great day. I got X, Y and Z done and also P, D and Q.

The next question and obviously the first time you have a standup, this is where you will start is what are the things I'm going to commit to delivering today? And just like with the weekly planning meeting, I want to be really careful about the words we use in terms of these commitments. I really like to try to abolish the words "I plan to work on" or "I plan to dive into", right? I don't want to use the standup to talk about your best intentions for your efforts, right? I want you to commit to a deliverable as much as possible. And if you're in deep and you're working on something that is going to take multiple days, that's fine.

Let's talk about what are the increments of progress that you're going to make. So if you've got a big research memo that you need to write, then, you know, the thing you might commit to in a standup is I'm going to review the top five cases that I've identified already that I believe are gonna be germane to this memo that I'm writing. And I'm gonna have a summary of

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that research, right? So that's the deliverable, the tangible manifestation of the work that I've done.

So question one, how did I do relative to yesterday's commitments? Question two, what am I committing to delivering or accomplishing today? And then question three is what are the roadblocks that are in my way? And that's a funny one, you know, people sometimes struggle with the idea of roadblocks. And so I would say not only should question three be about roadblocks, it should be about highlighting dependencies.

So I hope to work on the, you know, reviewing the pleading in the Jones matter, but I'm dependent on an associate or a paralegal actually finishing their draft of the pleading and the Jones matter. So making sure that if someone else on the team or maybe some external party is necessary in order for you to do the thing that you need to do, you wanna call that out and be explicit about it.

Now those aren't the only three questions that are possible. You know, as I said a minute ago, I think getting into something of a personal check-in, some sort of a subjective piece that's like, yeah, I'm feeling great today. I had a good night's sleep, whatever, or I'm dragging today. I think that can be a useful thing to add in. Different teams are going to have different comfort levels about whether they do that at first or frankly do that at all. But I think it is a sign of a high-functioning team to be comfortable having those more subjective discussions as part of the standup as well.

Now, the key thing, especially on that second question, right, what are the commitments I'm making for the next 24 hours is that we want to make sure we have a record of those commitments of some sort and there's a few different ways to do this. I kind of miss the days of the physical Kanban boards.

The thing that I used to do with teams a lot was each person on the team would get a handful of stickers or tokens or avatars, something that's like,

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oh yeah, these are my four sort of units of commitment that I'm going to use on a daily basis. And when they would have a stand up in front of the Kanban board, they would take their number one avatar or their number one token and say, yeah, my highest priority today is to finish the draft of the pleading on the Smith matter. And then they would put that token on the card for the Smith matter. And so it would be really visible to the team. The act of actually sort of making that commitment on the board sort of made it real. And that was a really effective practice.

There are ways to replicate that on digital boards and how you do it sort of depends on the capabilities of whatever software you're using. The two that I use the most, which is Kanban Zone or Businessmap, they have the ability to use tokens. And so we can sort of use tokens or stickers. They're sometimes called on the card in a similar way where people are able to put, you know, one or two or three of their tokens onto cards on the board.

Kanban Zone actually also has this really cool functionality that I like a lot called My Focus. And so for each card and actually for each task on a card, there's a little bullseye icon and when you click that icon it puts that particular card or that task into your My Focus section. And you can then kind of use that as your kind of task list for the day. It's like, all right, my job is to work on these four or five or six things that I've identified as my focus for the day. And that can be really effective as well. When you do that, right, regardless of which method you use, the thing that winds up being useful is to kind of leave that token on the card until tomorrow's standup.

And then that's your record of what commitments you made yesterday. And so you'll then sort of look for your token on the board and say, great, my first priority was to do this, I got it done. And then you'll pull the token off. And that's the indication of progress and accountability with the team.

There's other ways to do it. You can keep a physical list. I know some people that use Slack or Teams will sometimes have people put their, you know, top three or five commitments into a Slack channel. I don't love Slack

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and Teams, so if that's a method you use, great, but I'm not a giant fan of that tool set.

I've even seen teams that are using, you know, an AI recorder, right? Or a voice to text or recording the meeting, especially if you're doing it on Zoom or whatever virtual way, and, you know, use ChatGPT or Cloud or whatever system fathom that you like to give you a record of what each person's commitments were for that day. We want to make sure that we capture that and then again, it should be present in tomorrow's meeting so that we know how people did relative to the commitments that they made yesterday.

All right, so what are some of the pitfalls of this practice or maybe the anti-patterns to use that word that I like to use? A few things, right? Number one is I really hope that you're able to develop a system and a cadence and a set of practices with your team to make it really clear that this is an accountability meeting. It's not a micromanagement meeting. And I know the line between those two things is not entirely bright, but this is about helping people come to that honest reckoning with capacity, helping people through accountability partnership to set realistic expectations and then deliver on those expectations.

It's not about sort of naming and shaming and blaming when work doesn't get done. It is the feature of modern life that we are putting ourselves over capacity on a regular basis. And so it's gonna take a little bit of time for everybody and different people are going to operate on different timeframes to sort of get their commitments into something that is more realistic.

The other anti-pattern that is really common is that people on the team will tend to want to use it to report out on every single thing they did in the previous 24 hours, and that is not what this is for, right? There are a lot of things that you need to do with your day that aren't gonna come up in the daily standup, right?

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This is about making sure really that the items on the hot list are making progress. This isn't the laundry list of all the things I did yesterday. The only thing that really matters, especially in that first question, what did I accomplish yesterday or since yesterday, is how did I do relative to the commitments I made? That's not to say that you didn't also have a phone call with a client or check in on a court filing or whatever, right? It's about really making sure that we're being consistent with the deliverables we said we were going to deliver.

One of the best ways to combat that is to set a timer. You know, I said a few minutes ago that my general practice is I like the length of the meeting to be one to two minutes times the number of people on the team. I think it can be, you know, it might feel a little draconian at first, but it can be really effective to set a 90 second timer on your phone. Or if you have a one or a two minute sand timer, flip it over and make sure that people are being sort of forced into a time box and that will help them eventually get more concise and get more concrete about what they're reporting out and folks will be less inclined to do the laundry list.

The other sort of pitfall or anti-pattern that I will run into on occasion is kind of the flip side of that, which is people will actually give too little context or make these sort of really cursory and vague commitments. And I don't want to see that either. That's a version of sort of hiding under the busy cloak is a term that I use. Sometimes I don't think I've used it on this podcast yet, but there are certain people that like to feel busy and they are genuinely busy, but they're not really accountable to deliverables because they're really good at saying, oh, I'm busy and then using that sort of vagueness in order to hide from the accountability to deliver actual incremental work product.

And so sometimes you'll have people on your team that are just kind of really flippant. It's like, yeah, I'm going to do this and then do this and then do this and then that's it. And they're not really participating in that teamwork kind of aspect of it. And it's okay. It's natural, but I think we want

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to try to draw those people out as much as we can and get them involved in really understanding how they're planning their day and what the commitments are that they're making.

All right, so to wrap it up, a few key points that I'll just reiterate.

Number 1, have the standup at a set time every day and just make it as consistent as you possibly can. Right? Again, some people are gonna miss it on occasion, but as a rule, everyone shows up for the standup and everyone shows up prepared.

Number 2, we're all gonna agree that this is gonna be a little uncomfortable at first and we're just going to commit to it for a chunk of time. You know, I would say at least a couple of weeks, maybe a month and it's going to get better. But I think getting in the habit of doing it and figuring out what works for you and your team, eventually you're going to come on something that is going to help you with your performance overall.

Number 3, I really want you to avoid and catch people if they're using the words, "well, I'm going to work on" or "yesterday I worked on", right? I really wanna tie the standup to tangible deliverables wherever possible. And it doesn't have to be a formal deliverable, right? It can just be, yeah, you know, I finished the first two sections of this pleading. That's not a full deliverable in and of itself, but it at least is a tangible marker of progress. And that's what we're looking for.

And number 4, you know, make sure that you're holding the stand up in the context of your larger commitment. So the Kanban board, the hot list, maybe both. However, you're sort of expressing with the team. What are the matters or projects that absolutely need progress, right? As we identified in the weekly planning meeting, the daily standup should tie into those as much as possible. It's not to say those are the only things we're gonna work on, or even the only things we're going to talk about in the standup. There are other things that will come up, but we want to make

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sure we're grounding it in the progress that we've committed to make on that weekly or ongoing basis.

All right, that's it for today. If you've got any thoughts or questions, please don't hesitate to reach out to me. Folks have been emailing me lately, which I love. You can reach me at john.grant@agileattorney.com.

This podcast is produced by the great team at Digital Freedom Productions, and the theme music is Hello by Lunara. Thanks for listening, and I will catch you next week.