

Memo to Firm Leader: Are You Getting Minutes from Group Meetings?



Whenever I've been called in to work with some firm's practice or industry group, perhaps some group that needs remedial assistance or one wishing to formulate a strategic direction, my first questions of firm leadership is usually to please send me copies of the groups' most recent meeting *minutes*. The response I almost always elicit is . . . "*Minutes? What the hell do you mean by minutes?*" Which tells me everything I need to know!

I have continually found that too many group meetings (if your practice or industry teams are meeting at all – whether in person or now virtually) are simply a convenient excuse to have lunch and find out what everyone has been up to lately. Many groups may spend time talking about workloads and about what might be new with a particular client that everybody is familiar with – but few actually engage in collaborating on projects that could advance the group's ambitions.

What I've learned and observed first-hand is that the high performing groups, the ones that are bringing in better client work and striving to dominate in their chosen market or industry areas, actually invest some portion of their meeting time in ***action planning***. They meet with a specific agenda designed to brainstorm, discuss and determine some joint projects that the group would benefit from working on and then having partners volunteer to implement certain tasks.

The acid test and often embarrassing question that I have the audacity to pose to firm leaders is: "*Since your practice and industry groups are the fundamental business units determining your firm's profitability this year, how do you know, right now, whether your groups are really doing anything meaningful?*"

The only way for you, as the firm leader, to determine an insightful answer is to get the group's minutes and see whether there are specific tasks and projects identified and underway, with specific partners committed to implementing those projects – and ideally those projects should line up with the written, strategic business plan that each group created and submitted to firm management. (and YES, I'm talking about a real

“*strategic*” plan, not one of those silly three-page templates that someone in the firm handed out to each group leader to complete at the beginning of January).

As the firm leader, if you are receiving the monthly minutes from each of your groups, you can fairly easily determine who’s being effective and who is off track, who’s working on implementing their group’s plan and who is not; and which team leaders you might need to spend some time coaching and which you need only send a “good work” note to. Alternatively, without regular minutes you will not likely find out how any of your groups are progressing until . . . perhaps the end of the year, if then.

And when I use the term “Minutes” I am not talking about some written record of the various conversations and meanderings of the partners during their latest gathering. Attached is an *excerpt* from a typical, written report that was compiled following a meeting of the partners within a Products Litigation Group:

Products Litigation Group Meeting

May 21, 2020

Joanne – will compile and present a list of the (niche) manufacturing companies that we have represented (both in our group and across the firm) with an indication of who our main contact is and the relationship we have with each contact.

Chris – will provide a report on what other competitive firms are doing in the (niche) manufacturing industry, what specific industry groups are active, and what some of the timely issues are that populate the agendas of these industry groups

Geoffrey – will conduct some research into a new federal act that is just being introduced and prepare a written summary of the regulatory implication for the group to review.

Allison – is going to research government contacts in the economic development department, visit/interview them to determine their views on selective industry issues and report back to the next meeting

Brady – will review our experience and provide a summary on how we have been performing in doing this work using alternative fee arrangements.

Colleen – unable to attend the meeting.

Andrew – will work on developing the first draft of a specific template for conducting a thorough litigation post-mortem.

This is typical of the type of written report that, if I were the Managing Partner, I would want to receive every month from each and every one of my Group Leaders. The report

is simply one page, listing each “core” member of the practice group by name, with a specific project (or not) that that individual had volunteered to complete by the next monthly meeting date.

At a glance, I can then see what is going on in each of the practice groups and who is working on what.

I can also begin to identify if the same project appears each month next to the same partner's name - which may indicate that that partner isn't following through on whatever task they promised the group they would execute.

I can also see whether there is a pattern of certain partners not regularly attending meetings or not contributing.

I can see whether the projects that are getting implemented are in concert with the practice group's written strategic plan or simply 'make busy' activity that isn't really advancing the group's ambitions.

And finally, I can distribute each practice and industry group's one-page action planning summary to any and all other groups where there is any areas of potential overlap or potential synergy (where having two groups collaborate could achieve far greater benefit) – and also post all of the reports online so that any practice group leader (or any partner) may review what other groups are working on.

Sounds simple? It actually is!

It requires that firm leadership set out some expectations of what practice and industry groups need to be doing and then hold the team leaders accountable. One of those expectations involves every group having action planning meetings that focus in on specific tasks and projects that advance the group's strategy – rather than convenient excuses to simply have a Zoom chat about what's been going on.

So my dear Firm Leader, are you getting minutes from any of your various group's meetings and do you know what each group is actually working on and accomplishing?