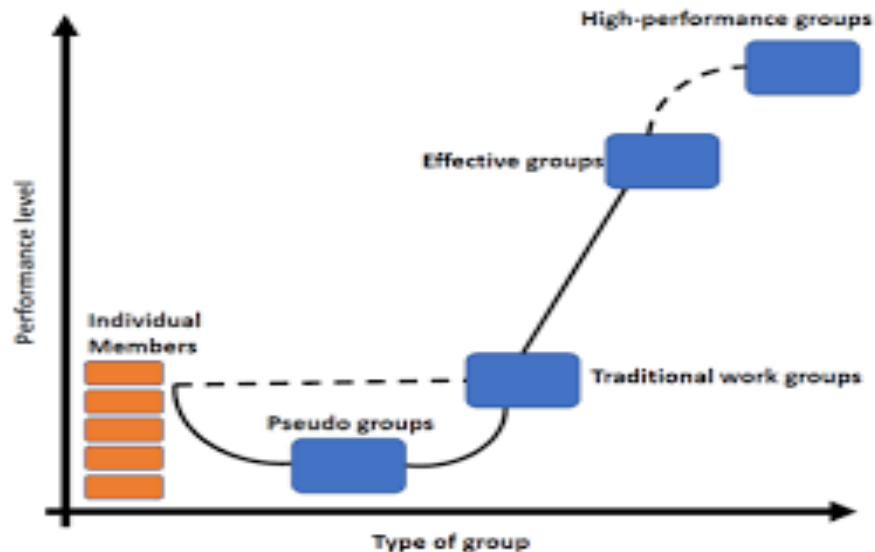


## What High Performing Groups Do

*Hint: They Meet Weekly! (Part 1)*



Amongst the first things that I usually do when hired to train a group of practice or industry group leaders is to interview a handful of those serving in the position. What I say to my contact at the particular firm is, give me a half-dozen names; three who are fairly experience group leaders, three who need some remedial attention, but please don't tell me which is which. That said, it doesn't seem to matter because as I begin to interview these leaders, one in the series of questions I usually ask is "And how often do you meet as a group?" One of the common responses that I have come to hear is, "Occasionally" which I eventually came to recognize as code for . . . NEVER!

And why does that happen? I believe it happens largely because no one has ever given these group leaders any substantive guidance on how to conduct an effective meeting and what subject matter good meetings should actually cover. Those of you who may have read the five reasons I articulated in "Where (Practice/Industry Group) Leadership Fails" can now add a sixth training shortcoming. And if you have ever had someone training your group leaders who did not instruct them on the importance and process of effective meetings, label that professional negligence.

Now, like it or not, meetings are a large part of what you do as an effective team leader. You arrange one-on-one coaching sessions with individual partners in your group; you make yourself available whenever some group member has an issue or situation that they need help with; you organize an annual strategic planning retreat with all the group members to determine future directions; and you attend at least quarterly meetings with other group leaders to discuss common issues and successes.

In the research and preparation of *First Among Equals* and for some time after its publication, I had the opportunity to interview leaders from dozens of large firms comprising law, accounting,

consulting and other professions. My mission was to identify what the highest performing (practice or industry) group leaders were actually **doing** to inspire winning performance within their teams.

I would approach a firm leader and ask whether there might be one specific group leader within the firm that “*stood head-and-shoulders above the others.*” Invariably I would hear, that would be our George or Jennifer. I would then go and interview the particular individual who was identified. Now while this was only touched upon in our book, one of the findings that my research revealed was that in most cases these individuals did not meet with the members of their groups once per month (for an hour) – but they met **ONCE PER WEEK!** And these group leaders engaged their teams in four very different types of meetings, which collectively helped explain their exemplary performance. Today, I dare group leaders to tell me that their team members would not embrace and benefit from any of these four meetings.

The meeting formats that I will outline for you can involve core group members as well as other partners, associates and even para-professionals; and can be easily facilitated with a group that is all assembled in one room or with group members participating virtually. This article will provide you with a basic outline for how to conduct each of these different types of meetings and to the best of my knowledge I have yet to hear of anyone, especially a consultant who claims to work with practice or industry groups, share this kind of information.

For our purposes here, imagine that you as a practice or industry group leader, are meeting with the members of your team ever week (Tuesday at Noon); either physically and/or virtually. Your meeting will be scheduled to take at least one-hour and sometimes an hour and a half, depending on the content and the size of your group. This approach assumes (1) that groups are empowered to make decisions about low-risk activities under their control and that (2) your group size is manageable. I was struck by Amazon’s Jeff Bezos instituting his famous “two pizza rule” meaning that no team should be so large that it could not be adequately fed by two pizzas. In my view, a core group of ten to twelve partners has empirically been proven to be the maximum size for achieving exemplary results.

## **MEETING ONE:            Building Skills and Transferring Knowledge**

In some of my initial research into high-performing teams I inquired as to what partners wanted in being a member of and contributing non-billable time to any group. Amongst the various responses was “*Able to learn and grow my skills.*” If one then explores with them how that might best be accomplished, one of the easy ways would be to “*learn from each other.*” It then follows, how do we best accomplish that?

In examining how to do this, your Meeting Agenda can be divided into two complimentary but separate segments (1) Matter Post- Mortems; and (2) Practice Briefings which are largely comprised of internal CLE-style updates – as there are a number of firms who subscribe to the principle of attend one (training event) – teach one.

While it is important to find the means to effectively share substantive and technical information: “*what different members of our team are currently working on,*” I would offer a small caution.

Some professionals behave as though they believe that the true purpose of every group meeting is to provide a forum for their long-winded discussions on what they've been up to lately. We do need to keep in mind that information can be shared with group members in countless ways, such as: memos, electronic bulletin boards, intranets, e-mail, written progress reports, and even informal word-of-mouth communications. Valuable meeting time should be spent in a deliberate and disciplined manner, tapping into the collective genius of all the minds present, but only as it contributes to moving your group forward.

What I learned and what I believe is that your highest priority and very best use of your group's time is to review specific learnings and new information, or skills acquired while serving clients, dealing with client problems, or gleaned by successfully handling an emerging issue that some client was struggling with. In other words, there is a vast difference in the value of hearing one of your partners talk (in general terms) about a matter that they have been working on, versus hearing about what that partner specifically learned, that might be of use to others in the group, from the way in which a particular matter or transaction was handled.

The accumulation of most new knowledge and skills usually occurs while you are working on some client matter. Therefore, rather than the question: "*tell us what you are working on?*" the question should be phrased: "*what have you learned, especially while working with your clients, during these past weeks that may be of value to the other members of our group?*"

In other words, each group member should come to this meeting, fully prepared to identify and explain to the group, any particular client matter that:

- 1.) exposed you to an entirely new type of client / industry / geography / transaction?  
(e.g. involved work undertaken on behalf of an "unusual" client as defined by the nature of this client's business, geography or matter size.)
- 2.) allowed you to successfully deal with a relatively unique client problem?  
(the particular client matter that you were handling was completely novel and involved you having to take an unprecedented approach to resolving the client's issue)
- 3.) allowed you to develop new knowledge or refine a skill that you can now market to other clients?  
(e.g. amid an unprecedented run with sky-high valuations and competition, M&A deal teams are being asked to close transactions in a compressed period of time, and with your latest deal you developed a methodology to dramatically speed up the due diligence process.)
- 4.) allowed you to either work at a more senior C-level in the client organization; expose you to a technology being used that we might emulate; or enabled you to collaborate with some other multi-discipline specialist?

Productive time is then spent hearing how the member handled the matter; what new approach they may have attempted; and what was specifically learned that would be of value to other in the group. With a virtual group you might ask each member to submit a one-page brief summary to everyone in advance of the meeting.

Members of groups can also find it highly valuable to devote some time on the agenda to hearing from any colleague who has attended a Conference, Webinar, CLE or industry event, to directly share their notes and learnings so that the essence of that educational experience can be multiplied for the entire team. Many groups even make it a habit to have specific members of the group, especially some of the more senior and experienced partners, take turns preparing a brief presentation designed to enhance the skills of everyone involved. I have witnessed partners demonstrating to their group the effective use of a new technology (that everyone could benefit from being more familiar with), and a partner briefing colleagues on a new regulatory development about to be introduced that will have impact on the problems facing clients.

In principle, one of the attributes of our groups is that the value that we can bring to market is not just the talents of individual practitioners but should also encompass having each of our professionals empowered by the accumulated knowledge, wisdom, systems, methodologies, and experiences of the entire group. What better use of an hour's time during a given week than helping share knowledge and build skills.

## **MEETING TWO:           Assimilating New Developments**

One of the paramount challenges that most firm and group leaders identify in any given survey, is how difficult it can sometimes be to instigate change within any professional firm. From my decades of experience, I truly believe that that difficulty is attributable to busy professionals living in a bubble; head down and consumed in solving client issues such that they are not involved in looking outward or knowing anything about what trends and developments are transpiring that may affect their practices, their professions and their future prosperity. So, one of the important subjects that any group needs to devote some time to focusing on, is in identifying emergent marketplace changes.

High-performing group leaders who do this with their groups tell me that the benefit of investing the group's time in this kind of meeting activity is that:

- some of our fellow teammates may be exposed to insightful information or be in direct contact with phenomenon that would be of significant benefit to the group as a whole, if only it were shared;
- weak signals of some impending trends, if recognized early enough can give the group a head start to prepare for taking advantage of identifying new client needs to exploit or competitive challenges to address;
- for any group, having a grasp for what might be around the corner and being able to communicate and share that with your clients will be of immense value and differentiate your group's services in a meaningful way – as it allows us to be perceived by both our clients and prospects as a group “that is in the know;” and

- the degree to which the identification of some specific trend serves as the catalyst for members of your group to want to initiate particular change, is far more determinative of the group progressing, than if the idea comes only from the group leader.

Consider this: if we knew today what we will know in 2025, how would we change our attitudes, actions and the way in which we practice law — the services we offer, the clients we target, and the ways in which we chose to deliver our services? That is what this meeting is really all about – observing the present trends to determine how we might intercept the future.

The industry and practice groups that effectively engage in these kinds of meeting discussions start by identifying a number of relevant external components. For example:

- How Technology is Evolving

What do the changes suggest for how we should embrace or utilize technology going into the future?

- Emerging Areas of Required Expertise

Where are the micro-niche opportunities likely to be in the coming years and which opportunities should be proactively investing in?

- Competitive Threats

How will our marketplace evolve and what do we need to do to capture a great share of the “better” business?

- Changes in the National and Global Economy

How do we expect to operate in an economic environment that may be very different from the economy that we are currently use to?

- Advancing Government and Regulatory Developments

What new government programs and initiatives are likely to emerge and how will they have an effect?

Your first step is simply to scan the external environment in each of these distinct areas for early warning signs and for areas of new opportunity. You want to then engage all your group members (partners, associates and para-professionals – where appropriate) to voluntarily select one external component that they would be willing to invest time into monitoring between meetings. You can engage your administrative and marketing professionals to assist in monitoring legal and industry publications and directing relevant information and news clippings to those who volunteered to examine certain subjects. By studying the goings-on in these areas and connecting the trends in all of them, you can begin to build a reasonable basis of fact (and speculation) about what will happen over the foreseeable future.

The challenge for each group member is: *“In your opinion, what would be the most important trends capable of impacting, both positively and negatively, our group’s success (or for Industry Groups: client’s success) over the next few years?”*

Each of the trends that have been identified can be evaluated within the context of the PROBABILITY of occurrence and IMPACT (negative and positive) on your group, of such occurrence. Obviously, only those trends judged to have a very high probability of occurrence and a very harmful impact or portend huge opportunities should they occur, become your top priority.

Finally, it is necessary to transform the discoveries that come from your discussions into actions. There is little point in knowing that you are heading for an iceberg if you don't determine how to course-correct and steer around it. In order to be effective, some portion of your group's strategy must concern itself with what we must be doing right now in order to be well positioned to capitalize on our future. Among other considerations, you should therefore attempt to identify:

- what skills should we be developing (or hiring) *right now*;
- what must we do to anticipate and better serve unmet client needs *right now*;
- what new practice niches should be pursuing *right now*; and
- what new experiments and field tests should we be engaging in *right now* in order to intercept the future.

For every practice and industry group there remains a need to look to the horizon to see how the future will unfold. Behind every new trend and its ensuing ramifications is either a potential marketplace threat or a window of opportunity. Those keen enough to perceive the trends early are in a prime position to pilot their practices and their groups into a more promising future. The obvious challenge is to be the first to see the future and then devise appropriate action plans to take full advantage.

Tune in next Saturday for part two on our Weekly Meeting Formats

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