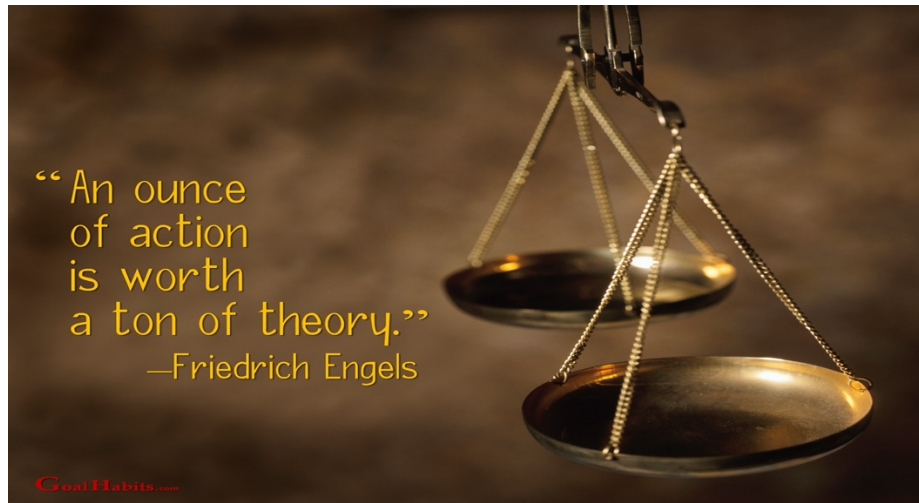


What High Performing Groups Do *Hint: They Take Action! (Part 2)*



As I mentioned previously, 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. The final part of this article addresses the remaining two meetings, the first dealing with Bringing Outside Voices In and the second called an Action Planning Meeting, and the one I firmly believe to be the most important of the four because it deals with actually doing something and having your group **take action**.

MEETING THREE: Bringing Outside Voices In

I have had the privilege of conducting well over a dozen virtual training workshops over the past year with the leaders of both practice and with industry groups. At each of those workshops I asked of the group leaders in attendance, “*Given that it is so much easier now with Zoom and video-technology, how many of you have invited one of your group’s clients to attend your group meeting – during the past six months?*” It is no exaggeration but only with sad bewilderment that I report, I have yet to elicit a single positive response!

Imagine the benefits of inviting one of your best clients to address the group – in person or by video. Ask how they’re dealing with internal and external challenges, what they’re seeing in the marketplace, what decisions they’ve had to make and which ones they are still pondering; how their people are coping, what their greatest concerns are, if there is any positive news that has emerged from the turmoil, what they are focusing on next, and of course, is there anything at all you can help them with right now? And if you ask the right questions you can even elicit some insightful competitive and market intelligence on what other law firms are currently up to.

And there are so many other voices to be considered. For my part, I laughed my ass off when Alternative Fee Arrangements (AFAs) re-emerged following the 2008 melt down and witnessed consultants coming out-of-the-woodwork claiming expertise in the subject. A knowledgeable observer would have seen a 2000 published book, written by Ron Baker entitled “Value Billing”

and realized that the Accountants have been down this road for some time. So, when was the last time you invited someone from one of the accounting firms you know, perhaps serving similar clients to your group, to come present at one of your meetings?

Today there are so many firms that claim active membership in global law firm alliances, networks and groups – from Lex Mundi to TerraLex. Wouldn't it be fascinating to invite your counterpart in some member firm located in Australia or the UK to tell your group about what new opportunities they might be exploring in the same practice or industry that you are serving. Whether it be serving clients in Cybersecurity, Health Care, Energy or Crisis Management, some of these “foreign” firms are doing some interesting things where their knowledge gained may very well be transferable.

And let's not forget the potential benefits from having some notable academic, research expert, government representative or industry thought leader come and share what they are working on with the member of your group. From my experience, these people are very likely to be highly flattered that some notable law firm would ask them to come to their meeting. And if you doubt for one moment the kind of inside information you may be able to access from these kinds of sources, well then perhaps you should just go back to your *occasional* group meetings.

MEETING FOUR: The Action Planning Meeting

Amongst all of the four different kinds of meeting, this is the one that I believe is the **MOST important**. I say that because the other three could be categorized as “talking” meetings – but this is really a **doing** meeting. To that end, this is a bit different from the usual experience that most attorneys have when getting together, largely because it involves only ONE agenda item, requires everyone to actively participate in brainstorming (not something that attorneys regularly engage in doing) and concludes with the group members determining what specific actions need to be taken. Here are the eight sequential steps you need to facilitate in order to have an effective Action Planning meeting:

1. Set a singular focus

As I stated, this meeting needs to be devoted to only "one" action-planning issue of importance to your group. The ideal topic could be drawn from your group's strategic goals, but assuming that you might not have set such goals, here are a handful of topics that I should expect every group leader would find valuable to have their group members engage in exploring:

- What is our group's strategy for getting “better” business from prospective clients over the coming year?
- How might we adopt and implement new technology to improve service delivery, enhance team member engagement, and share knowledge among our virtual group members?
- In what innovative ways could we mentor our junior professionals who do not have the facetime or live shadowing with their mentors that they did in the past?
- What do we need to do to better understand our existing clients, understand what is keeping them awake at nights and actually be perceived to be more valuable to them?

- As a group, how can we stand out from the crowd and meaningfully differentiate ourselves from our competitors?

2. *"Brainstorm" ideas*

Whoever in your group has the responsibility for facilitating discussions at your meeting (most often the group leader), should engage the group in a "brainstorming" exercise. The purpose of your brainstorming is to elicit tangible action ideas, that if implemented, could serve to advance your group toward achieving progress on their singular objective.

If all agree to be highly disciplined about getting to potential action ideas and refraining from engaging in lengthy discussions and debates, you can devote about forty minutes to this process. Of course, our natural propensity is to enjoy engaging in lengthy discussions, so it is helpful to have your group agree upon some basic rules before they begin. The accepted rules for this brainstorming activity are usually some variation on the following, should be set out in writing and posted for all of your group to see:

Say everything that comes to mind;

No discussion;

Make no value judgment comments - positive or negative;

Record all comments so that they can be seen and get down lots of ideas;

Encourage participation and build on each other's ideas.

Once having agreed to these rules, you can begin the exercise. One technique that helps is to methodically, go around the table asking each member in turn to contribute one idea. Another method is to have everyone write down one idea (anonymously) and hand it up to the facilitator who then records it on a flip chart for all to see. The advantage to using a flipchart or electronic whiteboard is that you can mount the ideas for everyone to see and retain them for transcribing a permanent record of the group's contributions.

The role of the facilitator is to get everyone's ideas out and recorded. It helps to number each idea as you write it down. Sometimes in the verbal flurry of ideas, it is easy to either miss hearing someone's idea or record it in terms that do not adequately capture the intent. Ensure that an assistant is there to take notes, keep time and help guide your actions.

3. *Ensure ideas are actionable*

The facilitator must be vigilant in ensuring that the ideas expressed are specific, doable, and can be implemented. Sounds easy, but it's not. In my experience, this is the most difficult part of the brainstorming process. We are all prone to expressing concepts or goals, and often find it difficult to transform those concepts into actions. My acid test is to always ask myself, "*do we have enough detail to be able to delegate this idea to one of our administrative professionals and they would know exactly what to do.*"

If you don't have enough actionable detail, then you need to politely (you are not disagreeing with the idea presented) and patiently, probe the idea originator for more specifics and more detail.

4. *Secure voluntary commitments*

Now this is where our typical group leader once having helped generate a long list of good ideas will be tempted to look at the list, look to their group members and simply assign tasks. And good luck with that tactic as I rarely have seen it work!

What does work is to go around the room (physically or virtually) asking each of your team in turn, whether there is one idea on the list that they would be prepared to invest a modest amount of non-billable (let's say two hours over the next month) working on. You might say to the group:

We are going to take a moment to review all of the ideas we generated. I then want to hear from each of you in turn. Is there one idea on our list that you feel sufficiently motivated by, that you would be prepared to invest a few hours of your time over the next month to get started on. Please understand, this is to be totally voluntary: no obligations, no recrimination. If you do not see an idea that you would be prepared to work on, then you may simply say 'pass' when I get to you. (No explanations are necessary.) However, if you do see an idea that you find motivating, then I want to hear which one it is.

The essence of success here is not picking the best, most strategically important ideas. That can wait until your group has had some experience and successes with productive meetings. Rather, your goal is to stimulate members of the group to take some modest amount of constructive action, thereby building momentum.

5. *Keep commitments small*

Each specific task must be small and doable. When people get caught-up in the process of generating good ideas or are stimulated by an idea that they like (often the very one that they themselves offered), they immediately want to volunteer to "change the world". Following the meeting, that same person returns to their client work with the very best of intentions only to encounter the numerous urgent fires that burn. Therefore, it is important to temper people's enthusiasm by reminding them that their regular revenue-producing work must also be done. You must determine with them what they think they can actually, realistically accomplish in the designated time period.

6. *Establish your "Contracts for Action"*

You must ensure that each task is carefully defined ("*What can we all expect to get from you by the next meeting?*") and completely capable of being accomplished. It helps to think in terms of the tangible outcome (or "**deliverable**") that will be presented at the next meeting to evidence the execution of this idea. Will this involve doing some research (a report); developing a policy, procedure, checklist or template; or taking some specific action that can be shown to have

happened? Have them describe precisely what they will bring back to the next meeting as evidence that something has been accomplished.

The facilitator's job is to ensure that he or she has helped the group generate a good list of very specific, tangible, quantitative and implementable ideas for moving toward their objectives. This list of tasks and the team member responsible forms the Agenda for your next Action Planning meeting.

7. *Follow-up between meetings*

Since expectations are naturally high following a good group meeting, any lack of progressive action by the next meeting is extremely detrimental to group morale. This is the most frustrating problem for busy group leaders. It is rather disconcerting to see how much time is invested in making good plans and how little effort is spent in follow-up to ensure that actions are being taken consistent with those plans. The single highest value-added use of the time of a group leader is following up, one-on-one with members of the team, to help them succeed. By pitching in and lending a hand to complete projects, you will be able to demonstrate an interest in the individual and make a meaningful contribution to the morale and results that a group can achieve. The underlying philosophy becomes one of not letting the team down. In one high-performing group I know, the rule is "*There's nothing you must do, but what you say you will do, you must!*"

8. *Celebrate successes*

The best groups always take time to acknowledge a specific accomplishment and improvement in reaching a personal or group goal. The outcome of present actions plays a major role in determining future actions. At the personal level, if people work especially hard and devote long hours to a project that eventually goes unnoticed, they will soon minimize or abandon their efforts. At the group level, if expectations are exceeded but there is no means of expressing pride in those achievements, it becomes a hollow victory.

People like to be part of winning teams. Early wins and clear evidence of early momentum translates into perpetual energy and continuing enthusiasm.

IN CONCLUSION

Meeting culture is essential to not only the happiness of your teams, but their productivity as well. When you are working remote, meeting culture is nothing less than the social operating system that defines how people interact, collaborate and get things done. Establishing the right meeting culture and meeting frequency is paramount. There is no set playbook for meetings that will work for every practice or industry group, but to be a high-performance group, **these are four kinds of meetings they seriously schedule.**