

HOW TO RUN AN

EFFECTIVE MEETING

*A Resource Guide for
Law Firm Owners*

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Preparation for the Meeting

Tip!

A well-organized and effective meeting is a cornerstone of a successful law firm. It's where ideas are exchanged, strategies are formed, and decisions are made. Here's how to ensure your meeting is productive from the onset:

NO AGENDA, NO MEETING.

If a meeting is important, which all of your meetings should be, prep work is key and without it, you waste time during the meeting. Consider making agendas standard for all meetings.

OTHER STANDARDS WE'VE USED

- No waiting - be on time
- Can't make it, let us know in advance
- Dedicated meeting days



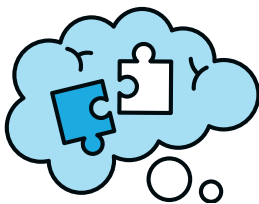
Define the Purpose

- Define the primary objective(s) of the meeting.
- Draft a clear agenda outlining the topics to be discussed.



Invitee Selection

- Invite only the necessary personnel who have a stake in the agenda topics.
- Make sure to include decision-makers to ensure the meeting is productive.



Pre-meeting Work

- Distribute the agenda in advance to all attendees.
- Request that attendees prepare for the meeting by reviewing relevant documents or bringing necessary materials.



Logistical Preparations

- Choose a suitable location that is conducive to discussion.
- Ensure necessary technology and materials are available for presentations and discussions.



Agenda Template

Date:

Purpose:

Requested By:

ATTENDEES:

- Person One - Role

Tip!

HOW MANY PEOPLE SHOULD YOU INVITE?

- To consider a **problem** or make a **decision**, 4-6 people
- To **brainstorm**, 5-10 people

RECAP FROM LAST MEETING:

- Update the group on action items carried over from the last meeting

DISCUSSED DURING THIS MEETING:

- New item and a brief description

ACTION ITEMS:

- Action Item and person responsible



Measuring Productivity and Success

Evaluating the effectiveness of your meetings is crucial for continuous improvement. Here are some metrics and methods to consider:

ACHIEVEMENT OF PURPOSE:

- Were the goals of the meeting met?
- Were decisions made and action items assigned?

PARTICIPANT ENGAGEMENT:

- Was there active participation from all attendees?
- Were diverse opinions and ideas considered?

TIME EFFICIENCY:

- Did the meeting start and end on time?
- Was the time spent productively following the agenda?

FOLLOW-UP EFFECTIVENESS:

- Were action items completed by the deadlines?
- Were the decisions implemented and what was the impact?

Bonus!

What NOT to Do

Evaluate meeting necessity to save time and resources, boosting efficiency in your law firm. Don't bring:

- **Outdated Reports:** Refresh data and reports before sharing in the meeting.
- **Irrelevant Conversation:** Keep the meeting goal in mind. Stay on track.
- **Unverified Data:** Check data accuracy before presenting.
- **Jargon:** Use simple language or explain technical terms for clarity.
- **Your Bias:** Keep discussion fact-based for productive dialogue.
- **Unprepared Presentations:** Give presenters time to prepare and review material.
- **Ambiguous Action Items:** Include only items with clear action steps and responsible parties.
- **Unclear Goals:** Clearly outline meeting goals and objectives in the agenda. If you don't know what a meeting is about before the meeting, should you continue?
- **No Follow Through:** Review status of previous action items for accountability.