

How to Conduct a Meeting

(Foonberg's Ten Rules)

Lawyers spend a lot of time in meetings. You will be in meetings with clients, staff, other lawyers on your side of the matter, other lawyers on the other side of the matter, judges, insurance adjusters, vendors, etc.

A well-run meeting results in confidence in you as a leader. You will be recognized as a person in charge upon whom clients and others can rely and look to for leadership and counseling. A poorly run meeting will result in everyone being angry or frustrated and blaming you for wasting their time when they had more important things to do.

While this chapter is intended primarily for face-to-face meetings, it can apply equally to telephone conferences and video conferences with others.

These rules can help you save your time and money.

1. Have a written agenda even if there is only one item being discussed. Do not assume that people know the purpose of the meeting. The purpose of the agenda is to be sure that everyone understands why they are there and the purpose of the meeting. Unless you have a written agenda, Mr. A. will think he is there to discuss one thing, Ms. B. may think she is there to discuss another thing, and you may think the purpose of the meeting is to attend to a third matter. There may be no communication between you. Each will be discussing a different subject, unaware of the fact that you are not communicating with one another. Do not allow "surprises" that you are not prepared to discuss. Tell the person, "I am sorry, that is not on the agenda. I will be glad to put it on the agenda for the next meeting." You must be firm. If necessary, call for a new meeting after the present meeting, at which time you will discuss the new subject. Do not allow you or your client to be booby-trapped with last-minute agenda items.

The person who habitually comes late to meetings is challenging you and your ability to lead. Stop them with public statements the others can hear. You may wish to ask them to see you privately after the meeting. You can then relate the total hourly dollar value of the people in the meeting as your reason for starting on time and progressing without going back over previously discussed items.

2. If there is no written agenda because of time urgency or because the meeting is an unscheduled meeting, announce at the beginning of the meeting; "The purpose of this meeting is...." Again, unless the purpose of the meeting is clearly set forth, people will not be communicating with one another. If someone else has called the meeting and has not provided a written agenda or made an announcement of purpose, you should make the statement. You could say something like, "Pardon me, Mr. Jones, I want to be sure I understand what we will be discussing today. Am I correct in saying the purpose of this meeting is ... ?" By making this statement, you will be saving everyone's time, including your own, and you will be establishing yourself as a leader rather than a follower on the team. You might even state, "Let me write this down. The purpose of this meeting is...."

3. Try to set a beginning and ending time before the meeting so that people can plan their activities around the meeting. Without an ending time, you risk people getting up and walking out because of other commitments, real or contrived. They will blame you for not completing their daily work assignments. Try to end all meetings on schedule or earlier. It is better to continue a meeting to another mutually agreeable time and place than to go on and on. The amount of time devoted should normally depend on the importance of the subject.

If someone comes in late (normally announcing they had something more important to do in order to establish how important they are), embarrass them by stating, "I'm sorry you're late. Come see me later or read the minutes to find out what you missed." If they go into the reasons they missed, stop them immediately. State, "I'm sorry, we've already discussed this." If they are habitually late in order to establish self-importance, tell them you won't bother them with the meetings, and will not invite them in the future, and decisions will be made without their input. Try not to go beyond ninety minutes without a break or an ending.

4. Announce in the written agenda, or orally, whether the purpose of the particular meeting is merely to discuss a problem, exchange input, or to take some action that may be influenced by what happens at the meeting. People will become angry when meetings take place and nothing happens when they are expecting something to happen.

S. Limit the amount of time any one person can speak, at any one time. Richard Ferguson of Alberta, Canada, who was chair of the Canadian Bar Association's Law Practice Management and Technology Section, actually gives a small egg timer to each person at the meeting and announces the person either has three or six minutes to say what they want to say.

6. Do not let people ramble beyond the three or six minute limit. Show them the palms of your hands and tell them, "I'm sorry, your time is up. We'll come back to you if there is time after everyone else has had their say. Perhaps next time you would like to prepare a written handout in advance so we can give your thoughts more attention." Alternatively, you may wish to repeat the Foonberg Rule of knowing when to stop talking. I often relate the following, mentioned earlier: Once, during a trial, the judge said to me, "Mr. Foonberg, I'm inclined to rule in favor of your clients, but keep talking and you may convince me to change my mind." This tells the person, "You've made your point. We all understand you. You are beginning to anger us by unnecessarily going on."

7. End the meeting on time with an announcement of personal responsibilities and decision making. "We only have five minutes left. Let's be sure we understand our next steps. John, you are going to.... Mary, you are going to...." You might state, "We have decided to change our system," or "We have decided not to change our system." "We have not decided what to do about the X problem." Be sure each person (including yourself) has a clear understanding of what they are expected to do and of what was or was not decided.

8. Set time limits for accomplishing next steps. "John, you'll have your report by the 15th." "Mary, you'll send a memo to each of us (or to me) by the 20th." "Sam, you'll contact Mr. Jones by Friday and let us all know the response." Record these time limits and remind people in writing immediately after the meeting of what they are expected to do.

9. Thank each person orally for their input. Try to say something about what each person has said, done, or contributed. Praise them in front of the others as a reward for attending and participating. If appropriate, thank them in writing. Be flexible. Every meeting develops its own dynamics. There's nothing wrong with ending a meeting in half the scheduled time when there's nothing left to discuss or decide or if the meeting is out of control. It's all right to extend a meeting just a little if the goals of the meeting are being met in an orderly manner. A well-run meeting leaves all those who attend with a sense of empowerment and control over their lives, and establishes you as a leader

10. Pay attention to both motive and motif. Try to hold the meeting in a clean, well-lit room. Place a new legal pad and a new pencil at each seat. Some big Wall Street firms and European law firms put out new legal pads with the firm's name, city and telephone number across the top of the legal pad and on the new pencils, hoping the attendees will take them as a form of marketing. Some firms also provide napkins with the firm name. Provide liquids, but try to avoid caffeinated or alcoholic drinks, which may cause people to leave frequently to go to the restroom. Cookies, which can be eaten without making a mess, are preferable to sticky cakes or candies. Tell the receptionist the names of those expected to be in attendance at the meeting so he or she will know what to do with their incoming calls. Assure the attendees that the receptionist knows the attendees are in the meeting and will take messages.