



## **5 Important Questions You Must Ask Before Scheduling a Meeting**

**Law Department Management**



Like many in-house lawyers, I spent my formative legal years working as a cog in the finely-tuned machine of BIGLAW. I was one of an army of associates expected to churn out an absurd amount of billable hours in return for ludicrous metrics-based incentive bonuses each year.

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That environment did a great many things for me: it showed me how utterly dissimilar law school was from the actual practice of law, inspired me to develop a chemical dependency on coffee, and, most importantly, taught me a great deal about the value of my time spent at my desk. But in spite of this boot camp training for better time management, there are moments at the office where time is needlessly wasted — even with the best intentions.

In an informal survey conducted at my desk just now, public enemy number one in terms of lost time at the office is the meeting. Whether in-person, via teleconference, internet, or satellite phone, the invitations and requests and placeholders pop up in my inbox several times a day, often back to back, multiplying with little to no information supporting the invitation.

However, meetings are almost unavoidable — whether for projects, committees, office initiatives, clubs, or otherwise. So in an effort to once again spread the good word of productivity and efficiency that I've preached before in this space, let's start with the basics.

## **Who**

Carefully consider your attendees, and ensure to include any internal stakeholders who may have an opinion on the overall project. Further, include anyone who may have the information necessary to push that project forward. There's nothing more frustrating than getting started and realizing that the group can't move forward because someone who should have been there either wasn't invited or was unavailable.

Fight the urge, however, to be overly inclusive. You're infringing on others' time, so don't take it unless you need it.

## **What**

Identify the topic of discussion and use it as the subject line of your invitation. Be concise but clear. Create a short but detailed draft agenda to serve as a road map for your discussion. Circulate that agenda ahead of the meeting (attach it to the invitation itself for ease of reference). If you're pressed for time, allocate a time limit for each item so you can stay on track. Solicit feedback on the agenda. If someone has an item for discussion, they'll hijack your meeting anyhow so you may as well allot time for it up front. This agenda will allow you and your attendees to be adequately prepared and to stay on task.

Additionally, track your discussion during and after the fact. If the situation warrants it, choose a lucky attendee and task them with taking notes for the group. Confirm that someone is taking accurate notes/minutes to ensure that the marching orders are heard and understood. Circulate these minutes to anyone who can't attend.

## **When**

To the greatest extent possible, choose a time for your meeting that allows everyone to attend. Use Outlook's scheduling assistant to see everyone's available. (This is another great reason to keep and maintain your own calendar and to encourage those within your team and business to do the same.) If you have questions regarding availability, pick up the phone and confirm before clogging inboxes with correspondence about timing or dueling proposals for a new time.

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It may be possible (if not likely) that not everyone is available at the same time. Consider your purpose and determine who your “must have” attendees are. Set the meeting to be sure you get those folks, and then solicit input from any ancillary attendees. (Author’s note: Do not call them “ancillary attendees.” This is considered discourteous...or so I’m told.) Offer to present their information or opinion on their behalf.

Also, try not to be “that guy.” Meetings first thing Monday morning or at the end of a Friday are the worst. In addition to being inconvenient, you’ll have late-comers and early-leavers who will interrupt the flow.

Oh, and don’t schedule meetings for lunch without making arrangements to either provide lunch or allow for attendees to eat during the session. For most, the lunch hour is sacred space. If you must hijack it, acceptable provisions include cold cuts and brownies.

## Where

If you’re all in the same place, there’s no reason not to meet face to face. Doing so eliminates many of the distractions that might divide attention and destroy productivity, such as ringing phones, email alerts, drop-bys, and the internet.

If geography or other circumstances render an in-person meeting impossible, the universe of alternatives is vast. Conference calls, WebEx, GoToMeeting, Skype for Business, and even FaceTime are all suitable means to connect. If you’re relying on technology, do a dry run before the meeting to be sure everything is responding as it should.

## Why

I saved this for last, but don’t be fooled into thinking that means it’s unimportant. It should actually be the *first* question you ask yourself.

I’ve seen a photo online of a participation ribbon emblazoned with the words “I survived another meeting that should have been an email.”

If this were a real thing, my walls would be littered with them.

I know that calling a meeting may break the monotony of an afternoon. It may bolster your confidence that what you do between 8 a.m. and 6 p.m. matters. Heck, it might simply be an excuse to bring donuts to the office. That said, consider whether any viable alternatives to calling a meeting exist. Can the message be delivered via email? Memo? If so, don’t monopolize everyone’s time by arranging a get-together for simple tasks. If you default to calling a meeting when it’s unnecessary, people will figure this out and start dodging your requests, which will no doubt impact you when the day comes that you actually need to put something together.

## Conclusion

I’m certainly not suggesting that meetings are bad, nor am I saying you should avoid them. A well-run meeting can inspire a team and can ultimately make or break a project. Understand, however, that by setting a meeting, you’re inserting yourself into the schedules of your attendees; you’re effectively telling each of them that the project on your desk is important enough that it should also be

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on theirs.

And it may well be. You may in fact need their time to further your goal.

But if you're going to take it, treat it with the same care that you would treat your own.

## Carl J. Peterson



General Counsel

Mid-Atlantic Business Unit at Titan America LLC