**Centralized Management and Preparing for Your First Meeting**

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In 2016, Dan McCormack was invited to be a contributing lead author for an online publication, “Study Guide for the CLM Exam” that was published by the Association of Legal Administrators in 2018. During his research and fact gathering for the study guide, Dan came across many interesting topics including concepts perhaps not pertinent for a guide intended for experienced executives but rather, issues of benefit to first time managers. The concept of how a law firm evolves to a “centralized management” structure and how best to “conduct a meeting” are two issues that new managers will find of interest.

* **How Centralized Management Processes Develop**

“Quality traits of successful law firms include strong leadership and effective management. Often firms start out with a single decision maker who is the firm’s founder and then as a firm grows, decision making evolves and advances from the founding partner to a democratic process, on to management by committee and then eventually a managing partner. This evolution occurs as the firm has the need to implement decisions quickly as their ultimate goal is to maximize the attorney’s billable hours thus minimizing the attorney’s involvement with non-billable hours.”[[1]](#footnote-1) The need to make quick and effective decisions influences many law firms to form a centralized management process. The centralized process helps to develop expertise within the management team which supports the objective of implementing decisions quickly within the fast-paced environment of law firms. Centralized management is not the only process that law firms follow however, an understanding of how such a management process develops demonstrates the importance to a legal manager for the need to be effective when having meetings and gathering information in support of decisions; the notion that “time is money” is not an over exaggeration.

Formats and the purpose of holding meetings vary and there is commentary and definitions dating back to the 1800’s on the subject. In 1876, “Robert’s Rules of Order” was published which established formal parliamentary procedures for hosting a meeting. Managers are not excepted to conduct formal parliamentary gatherings every time they plan a meeting however, there are take-a-ways from these procedures that can contribute toward effective outcomes of meetings.

The following are some suggested and modified guidelines from “Robert’s Rules of Order:”[[2]](#footnote-2)

* **Meeting Preparation**

Confirm a date that desired attendees are available

Arrange a suitable meeting place; considerate of location, time, accommodations

Compile supporting detail for the meeting

Create an agenda

Send out invitations to the meeting with a suitable response time

Calling a Meeting to Order

Show up on time; if applicable prepare handouts for all participants

Allow time for all attendees to arrive and announce anyone excused

Determine responsibility for the minutes of the meeting

If not already known, review rules of conduct for the meeting

If appropriate, take attendance as the meeting starts

* **Conducting the Meeting**

Confirm or review pending issues from prior meeting(s)

Follow agenda items

Present individual items in logical sequence

Do not overload items (not too many and keep significant items separate)

Confirm attendees understanding of items

Discussion of items

Allow for questions and comments regarding items

Adhere to rule allowing each attendee to individually voice their view

Confirm or clarify attendees’ questions

Confirm that questions are answered or if separate follow up is needed

Answer new items brought up or set them aside for follow up

Avoid repetition, wasting time and dominant voices

Come to closure and agreement of status for each item

* **Meeting Adjournment**

Review decisions reached

Identify pending issues requiring follow up

Ask if there are any further questions or outstanding issues

Announce that the meeting is over

Post Meeting

Distribute the notes in a timely manner; stipulate time to make addendums

Follow up on any pending items or issues

Evaluate final meeting information and proceed with decision making

1. The Survival Guide To Implementing Effective Law Firm Management Strategies, by Arthur G. Greene and Sandra J. Boyer, ABA Law Practice Divisions, American Bar Association, 2015 [↑](#footnote-ref-1)
2. Robert's Rules of Order Newly Revised, Henry M. Robert et al, Da Capo Press, 2011 [↑](#footnote-ref-2)