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Matter  
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# Running Your Stand-Up Meetings: Guide and Agenda

## Why Have a Stand-Up?

- Keep your board up to date and get real-time status updates to facilitate reporting
- Address problems as they come up
- Keep your matter on track and on time
- Share knowledge and information across your team



## Where Do You Hold Your Stand-Up?

- Standing in front of your physical board
- If using a digital board, via telephone or video conference with a shared screen, or with everyone logged into the board

## When Do You Schedule the Meetings?

- Daily in matters with aggressive timelines
- Less frequently if that makes sense given the pace of the matter, or if you're tracking work in progress of an entire practice group or department
- You pick the cycle that makes the most sense for your matter and your objectives. Don't overload people with unnecessary meetings
- For example:
  - you may want to meet Monday-Wednesday-Friday, or Monday-Thursday, if the matter is moving more slowly
  - OR once a week if the matter is in a slow period without much happening
  - OR once every week or two, if you are using the board to manage work-in-progress across a whole practice group rather than to track the progress of an individual matter

## Who Should Attend?

- Everyone on the matter team
  - lawyers
  - paralegals
  - clerks
- anyone else with active tasks assigned directly to them (Specialists, Litigation Support, Legal Assistants, IT, etc.)

## What Happens During the Meeting?

Each person gets a chance to speak about the work they're doing and the issues they may be facing. It's an opportunity to get input or advice from your colleagues, request additional resources, and keep your deal on track.

If your team is updating the board daily, you should not have to spend very much time, if any, on status updates. Everyone has access to the board; every team member should already know what the others have been working on. And because the meetings are held so regularly, issues that arise between meetings will be limited. They can be dealt with very quickly, or put onto the board and discussed between the relevant parties outside the framework of the stand-up meeting.

Keep the discussion focussed on the work, and keep it short. Aim for 15-20 minutes, maximum. Use this agenda to get started. Over time, as you get used to holding stand-up meetings, you may develop a different set of questions that work better for your practice and your team's culture.

## Sample agenda

### 1. Card/Task Update (5 minutes)

Provide 5 minutes prior to each meeting for people to add/edit/move their cards (physically or digitally). People should arrive prepared, with all cards updated. This time is for last-minute updates only. As your team becomes more familiar with the matter-management board approach, you may be able to eliminate this initial 5 minutes entirely.

### 2. Supervising Attorney begins the meeting with a very quick overall matter update (1-2 minutes)

### 3. Each person on the team answers the following questions (2-3 minutes each)

1. Are you on track? Yes/No
2. What problems/issues/obstacles are you facing?
  - a. New issues get added to the board
  - b. Other team members propose solutions to obstacles - if this will take more than a minute, parties agree to meet outside the Stand-up to discuss
3. What are you going to work on next?

### 4. Supervising Attorney asks the entire group: Is there anything we're missing/any task or issue that's not on the board?

### 5. Supervising Attorney ends the meeting with a quick thank you.