



Top tips: Working with lawyers

Before the meeting

Tip 1 - know your strengths and your lawyers' strengths

Your lawyers are there to provide you with legal advice on any commercial decisions you want to make. In order to do so, it is important that you take the lead and help your lawyers understand exactly what you are trying to achieve. Once you have painted them a clear picture of where you want to go, what, when and ideally how, they will be better equipped to use their legal expertise to help determine how you can best achieve your commercial goals.

Therefore, before the meeting, we advise that you spend time establishing your commercial goals, so that you can spend the meeting discussing legal points.

Tip 2 - set an agenda

There are times where there are so many things to discuss, lots of people with different priorities, and limited time. Without an agenda, meetings can quickly spiral into who can interject or speak the loudest, and important points get missed. To have a more effective meeting with your lawyers, we suggest you set an agenda. This can be relatively simple, for example:

- Topic 1 – name of person leading the discussion
- Topic 2 – name of person leading the discussion
- Topic 3 – name of person leading the discussion

If you're feeling fancy, Microsoft offers pre-made templates which can be edited. These can be found [here](#).

During the meeting

Tip 3 - make notes and keep a record

Every time you meet with your lawyers, we recommend you make notes. Making notes is important as it creates a record of what was discussed. More importantly, it can be a useful tool to seeing what actions need to be taken and by whom. Notes can be as in-depth as you like, from word by word notes to action-based notes -where you note who will be doing what and when. For example, using the following formula, Person A to do Thing B by Date and Time C:

"Alex will create a draft PowerPoint presentation and share with the team by Wednesday 12 January p.m."

Notes are also useful in checking what has been done, needs doing and what has not been discussed and / or actioned. Many lawyers work on more than one matter at any time, and notes are a good tool to keep them updated on your matter.

Tip 4 - ask questions and clarify

Don't be afraid to ask questions. More often than not, if you're thinking about something, someone else is too. Your lawyers are here to help you as best as they can. You will be the most knowledgeable person in the room when it comes to your matter. So don't be shy in pointing out things that may be obvious to you, but not to your lawyers who are less familiar with your area of expertise.

If you are unsure about anything, then always ask for clarification. This can simply be asking questions such as:

- *What do you mean by that?*
- *Can you please explain it in a different way?*
- *Just to be sure, you are saying...?*

After the meeting

Tip 5 - follow up with an email

It's a good idea to follow up after your meeting with an email setting out in brief what was discussed and agreed, and any action points with their deadlines. This makes sure that everyone is on the same page and provides a safety net for any additional questions and clarifications.

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