



MAKING YOUR FIRM RETREAT A SUCCESS

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There are a lot of attorneys who just don't believe in firm retreats. I hear the feedback all the time. They're seen as a big waste of time. One reason is because very often people get all hyped up, come up with great creative ideas, make all sorts of commitments, and then . . . nothing. The post retreat letdown can be devastating to morale of attorneys. Another frequently stated reason for dislike of retreats is that they fail to get the "real" issues on the table, or to resolve them if they do come up.

It's unfortunate that so many retreats are failures. They happen to be enormously powerful tools to build teamwork, resolve issues, improve morale, and forge strategic plans. But as with any powerful tool, one needs to know how to properly utilize it.

Most powerful tools come with instructions manuals. Thereafter, with care and practice, one becomes adept at using the tool. Retreats are no different. There are a myriad of excellent articles written about how to conduct successful retreats. Start your research with "Planning the Successful Retreat," "Retreats Let Firms Face Themselves," "Planning a Retreat to Tackle a Problem," and "Planning and Conducting Retreats" on the web site of Joel A. Rose & Associates (www.joelrose.com). Follow up with "Planning a Successful Law Firm Retreat," "Rethinking the Law Firm Retreat," and "Retreat But Don't Surrender" on the web site of Altman Weil, Inc. (www.altmanweil.com).

If your firm has particularly difficult issues to tackle, consider using an outside facilitator. The facilitator is usually viewed as neutral, with no hidden agenda. They are experienced in the process, and help the firm bring difficult issues to the table in a safe environment. They ensure that all voices are heard, and that stronger personalities don't dominate. They help the firm resolve issues, not rehash them.

I am still frequently surprised at how hard some attorneys work to avoid any conflict or confrontation at their firm. Is it possible to be *too* diplomatic? Yes! As a result, firms often become dysfunctional when there is no perceived outlet to air issues. I liken it to an emotional constipation which, left unchecked, builds into incredible pressure which will ultimately cause pain and disability. This sometimes

means that the facilitator must raise issues and say, hopefully diplomatically, what key partners are thinking but are reticent to say themselves. At some firms the vision and experience of many of the firms attorneys are limited by their lack of knowledge about how other firms operate. Often the facilitator must interject a “dose of reality” at key points, based on experience garnered by working with many firms on a variety of assignments.

One last advantage of using a facilitator is that it serves to remove the managing partner and executive committee members from the spotlight. They can become participants like the other attorneys in attendance. This gives them more opportunity to “hear” what is being said, to express themselves more candidly, and to think more creatively.

I am not a big fan of retreats with large amounts of time devoted to fun and socialization. I think that firms should create opportunities for the attorneys to socialize, particularly the partners. But the retreat is not the place.

Planned events like dinners and lunches throughout the year hosted at different partners homes offer a wonderful relaxed atmosphere in which to get to know each other on a more personal level. Planned outings for attending events, and even to engage in mild sports are also wonderful opportunities to socialize, as long as the events are such that the firm’s non-athletic members can participate without ridicule for lack of talent. And at one firm I know, regular wine tastings are a popular social event held right at the office at the end of the week. But the retreat, in my humble opinion, is about airing and resolving issues, improving communications, and strategic planning. The social time provided should be an opportunity for participants to huddle and exchange feedback on what has transpired, and to formulate creative ideas to help achieve their vision of what needs to be done.

OK, some of you are reading this and thinking “blah blah blah, been there, done it, and it accomplished nothing. Tell me how might we be more successful at it next time.” Not to oversimplify or be overly obvious, but a successful retreat depends on three things being handled properly: 1) preparation, 2) facilitation, and 3) follow-up. I find that if a firm works diligently it can do a decent job at points 1 and 2, but usually blows it on follow-up. And that’s what causes the post-retreat let-down. Better not to stir up the creative juices at all than to do so and then let them just dry out.

Preparation is one step most firms can do well on their own, once they know what it entails. Most firms diligently put together information on the firm’s profitability. But the sophistication of the information can vary widely. Sometimes



the information presented is the same as what one might discuss in a routine partner's meeting – cash flow, past due receivables, poor billing habits, associate turnover. Those firms don't "get" what the retreat should be about. At more sophisticated firms the financial information presented shows a projection of best and worst case scenarios for future profits based on a variety of factors the attorneys can discuss and control. Information about growth in practice areas, and the gain and loss of the firm's top ranking clients over several years can be reviewed. Firms thinking strategically will also examine the next 10 years with a projection of how many attorneys will retire, and what that means today in terms of planning on filling those gaps in practice areas and in management.

What is often missed in preparing for a retreat is determining what hidden issues are festering below the surface that need to be brought into the light and cured. Many managing partners assume they "know" what their partners are thinking. But often many critical issues are not openly discussed. For that reason a confidential survey can be utilized to help people speak more candidly about what is on their minds. The survey results will help build the agenda for the retreat.

As mentioned previously, a facilitator can be a strong addition to the process. That doesn't mean that the firm needs one each year. But there will be years when serious interpersonal issues surface that require a disinterested party to navigate. What is most important is that the facility be conveniently located, comfortable, afford absolute privacy during meeting times, and provide suitable facilities for socializing with a fair amount of privacy as well.

The agenda should be followed as closely as possible. That means that adequate time should be built in for each topic. Sometimes, no matter how long the time allotted, it is not possible to reach a conclusion or resolution. In those instances the person conducting the retreat should help establish the protocol to continue making progress. For example, a task force can be created and members selected, they can be assigned a clear list of marching orders, a deadline for reporting back, and be advised in what venue they will report (e.g. a partner's meeting or written report to executive committee). Even though the matter may not yet be wholly resolved, by taking these actions a satisfactory conclusion will be reached during the retreat to enable everyone to move onto the next agenda item.

As many people as possible should contribute ideas, and become involved as part of the implementation strategy. The goal is not to fill the plate of the managing partner with an overwhelming number of things to do and oversee. Rather, the goal is to share the workload by engaging as many people as possible in actively participating in the care and feeding of the firm.



One thing that is going to make or break the success of the retreat is post-retreat follow-up. The greatest ideas in the room are nothing but folly if they are never brought to fruition. **Action is key.** So it is important to make sure that all ideas are examined for practicality. That is not to say they should be shot down. But rather, probing questions should be asked like

- What actions need to be done to make this happen?
- Who will do what and by when?
- Can you realistically do that given your work load and other commitments? If not, what's more realistic, and will it accomplish the same thing?
- What resources do you need from the firm to do it? Are we all willing to commit the resources to give this a try?
- What results should we expect? Is that realistic? Do we agree it is sufficient for us to consider this a worthwhile use of our time and/or other resources?
- Do we need help from outside the firm to help us accomplish this? And if so, who will locate and work with that person and report back?

It's important to make sure that all ideas and related commitments be recorded and memorialized. It's also vitally important that accountability be built into the follow-up.

Accountability means having to face ones partners regularly and explain why commitments made have not been kept. It also means that all commitments accomplished, no matter how small, should be applauded by the partners. After all, progress is rarely if ever about making giant leaps forward. It is about making a continual number of small steps in the right direction.

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