

LAW OFFICE ADMINISTRATION

High Impact Retreat Is Trigger for Growth

A Well-Designed Event Can Elicit New Ideas, Provide Focus and Make Connections

BY DAVID H. FREEMAN

HOW DO YOU distinguish an ordinary partners' retreat from a high impact one? A regular retreat is usually more of a social event, whose major goal is to build camaraderie between the partners. Leaders report on the state of the firm, breakout sessions are conducted to allow interaction between lawyers in practice groups, and typically there is a lot of golf, food and cocktails.

A high impact retreat takes it to the next level. Savvy leaders know that retreats can serve as powerful management tools that can create, communicate and drive firm strategies. It can shift perceptions, prompt decisions, energize, motivate, and serve to obtain commitments to take strategic action.

A high impact retreat can be a catalyst to trigger change. It should focus partners on their most important goal, which is attracting and retaining high quality clients. It also represents "a natural stopping point where people can reflect on the past year and determine what to do in the coming year," says Nina Madok, director of business development at Paul

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Hastings Janofsky & Walker.

Three-Part Harmony

There are certain factors that often get in the way of achieving a high impact retreat:

- Poor design that does not support firm-wide goals. Organizers should link everything to the firm's strategy, and if you don't have one, use the retreat to build it.
- Inadequate preparation. An exceptional design can get people to do exceptional things.
- Insufficient post-retreat follow through. Keep your eye on the ball. Real success is usually measured by what is accomplished after a retreat.
- Too many talking heads. Many leaders use retreats to dump unnecessary information on their captive audiences. Save speeches for topics that are strategically necessary.
- Overly negative messages. You may have had your worst year ever, but your partners already know that. They need to see that leadership has a plan for climbing out of the hole and back to prosperity.
- Telling rather than engaging. Even if you have devised a brilliant plan, your partners must buy into it. The best way to achieve that is to have them build parts of it. "The goal is not to have the participants be told — but to discover — what they can do to achieve their goals," says Sam Frederick, CEO of SAFLAW Management and former director of strategic

planning and marketing at Saul Ewing.

A high impact retreat is a three-part harmony of preparation, the retreat itself, and the follow up that occurs because of it. "The magic in our retreat was in the preparation and design that led our lawyers to uncover literally tens of millions of dollars in both new business opportunities and existing client business prospects," says Betiayn Tursi, former national marketing director at Loeb & Loeb. Let's briefly examine how you can set the stage for an extraordinary event.

- Conduct a survey. Firms must be willing to face facts if they want to achieve their next level of performance. Survey partners in advance to get a real-time understanding of the issues they find most important (better yet, include associates, management, staff and clients to get a more complete picture).

- Gain support from senior leadership. Leaders must be prepared to stand behind the goals and design.

- Assemble the right team. Add creative and strategic thinkers to the retreat committee, and please don't forget your marketing and business development professionals. Given that retreats often represent the best opportunity to impact business development all year, I consider it "management malpractice" not to include these professionals in the process.

- Focus on the future. Get crystal clear on your objectives, identify the major issues that stand in your way, and build an agenda that gets partners focused on how

to achieve their goals.

- Use creativity and have fun. Let's say the firm wants to communicate its core values. It can have the managing partner simply give a speech, or as one firm did, it had the partners break up into small groups and take photographs of things that represent their core values. This brilliant approach not only made a difficult concept more tangible and enjoyable, but also got the partners discussing and understanding their values at a much deeper level.

- Keep it interesting. You want to engage minds and hearts. Make it relevant, inspiring and upbeat. Help participants discover how they can work together to build a better future.

- Determine the proper mix of work and play. With a clear understanding of your goals, you can determine the right formula. For example, multi-office and fast growing firms should provide time for partners to socialize and build relationships.

- Research thoroughly. Many of the group discussions will require specific data. Think through these sessions in advance and anticipate the information that will be needed.

Conducting the Retreat

While you may be doing many of the things suggested below, high impact occurs when you maintain a laser-like focus on achieving your most important goals. In general, you want your lawyers interacting with each other, engaging in important discussions, and making crucial decisions. You want them focused, energized and motivated to follow through on the commitments they make.

- Internal networking. Studies have shown that improving an organization's culture has a positive impact on its revenues. Therefore, do what you can to enhance relationships between your partners. This is especially important where firms have recently merged, acquired new offices, brought on laterals, or have multiple locations. One chief marketing officer estimates his firm had 10,000 to 14,000 client con-

tacts, and his goal is to extend those relationships to other lawyers in the firm.

- Full group events. Many overt, as well as subtle goals can be achieved in the large group setting. "While small group breakouts are good for interaction and getting to know each other, large group events show the collective strength of the enterprise, that we are mightier as an entity than as individuals," says Jonathan Asperger, director of marketing and communications at Mayer, Brown, Rowe & Maw. You can also use this time to impart important information. If you have speakers, stay away from pure entertainment. Effective speakers should challenge and stimulate the group, leaving them with ideas they can utilize in their personal or business lives.

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- Client interaction. Marketing-focused lawyers constantly say they should get closer to their clients. "If you want clients to be your partners, invite them to become your partners," says Al Romanoski, CMO at Altheimer & Gray. He reported excellent success when the firm had clients join the entire retreat. They participated on panels, socialized with the partners, and for a few days, truly became part of the firm. Warning: know your firm's culture. If your partners use retreats to let loose, leave the clients home.

- Smaller group breakout sessions. This is where you roll up your sleeves and get some work done. "A great session would be where the group feels they have moved the chains as to where they are going as a business unit, where everyone participates, makes new connections, feels good about themselves and the group, and has a sense of belonging," says Mark Beese, marketing director at Holland & Hart. Smaller groups like client teams, industry groups

and practice groups are the right size to engage in specific strategic and tactical planning.

- Action steps and accountability. The high impact retreat, in itself, is just a starting point. It is a spark that ignites a chain of events that continues long after the retreat is over. During the retreat, in order to support ongoing implementation of initiatives that come out of it, you should develop clear action steps, establish specific accountability, build time lines, and discuss the process for follow up and activity tracking in order to build attorney buy-in.

Follow-Up and Momentum

This is where the heavy lifting begins. Ongoing implementation of the ideas generated at a retreat is commonly the hardest element to manage. To keep the momentum going, firms should communicate successes, conduct regular check-in meetings with initiative owners, provide coaching where needed, and maintain a follow-up and tracking system. Another successful tool is the appointment of a "designated nag."

How do you measure the return on investment from a retreat? If you are looking for new clients, you can easily identify the opportunities and track successes over the year. If there are initiatives that have come from the retreat, measure your success at accomplishing those tasks. For intangibles like camaraderie, getting to know partners, and developing trust, you need different tools. A post-retreat survey can collect the perceptions of the partners and let you know if they feel you have achieved those outcomes.

By applying these principles, you can transform an ordinary retreat into a high impact event that can have a powerful influence on the direction and fortunes of your firm.

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