



Transform Your Firm with High-Impact Retreats



By David Freeman

Here's the scenario: You've received the mandate from leadership to conduct a retreat. You have a date, the venue and a retreat committee charged with developing an impactful program. Now what?

Stephen Covey said it best: Start with the end in mind. First, identify the goal(s) for your retreat; then, reverse-engineer to make sure everything you do is aligned with achieving those goals. Such engineering requires solid pre-planning, deft execution, inclusion and relentless follow-up. This article will discuss ways to design retreats that can serve as launching pads for improving your firm's performance.

Getting Started

A truly effective retreat acts like a laser, aligning and focusing disparate energies to burn new and deeper behavioral path-

ways. Because lawyers are a cynical bunch (myself included), they often require credible evidence before they will commit to acting differently. Such proof can come from competitive and market research, firm financials, client feedback, outside experts or internal surveys of your lawyers.

Develop a Retreat Theme

Creating an overarching retreat theme can send a powerful message to your lawyers about what is expected of them. If your desired outcome is to operate more efficiently and effectively, perhaps you call it, "Developing a Higher Performance Firm." If you want a more client- and business development-focused culture, you can consider a theme like, "Maximizing Our Most Important Assets: Our Clients." In any case, sending a clear message early and often keeps them focused on your goals.

Talking Heads vs. Everyone Talking

Most people don't like long lectures. Retreat planners must fight the tendency to think: "We finally have them sequestered in one place — let's tell them everything they should know about the firm. Let's share detailed financials, get all practice groups to tell their stories, rehash the strategic plan and make impassioned speeches to implore them to deliver higher levels of client service."

While some of this is useful, you must find the right balance. Realize this is a rare opportunity to meet each other, build rapport and trust, and develop buy-in for collaboratively addressing problems and finding solutions in the future. The goal is to teach, reframe thinking, energize and gain commitment for action. Use facilitation techniques and breakout groups to fully engage your lawyers and have them develop specific implementation plans. These approaches will go a long way toward gaining the full attention of your audience.

Also, on a somewhat related and very practical note, let's talk about sleep. Be kind to those from far-flung time zones. And if you plan late-night events, treat your folks gently the next day. One firm actually had a smorgasbord of headache pills and hangover remedies next to the breakfast table the morning after a long night of partying. Also remember, post-lunch is snooze time. Jet lag and late nights, mixed with morning speeches and a heavy lunch, can result in heavy-lidded, tuned-out lawyers. The solution is to get their blood flowing. As I described above, break them into smaller groups for interactive discussion and brainstorming, move them from one room to another or even consider teambuilding exercises.

Build Camaraderie

Personal trust is the precursor to greater collaboration and opportunity, and in just about every retreat I've facilitated, an overarching goal is to create stronger interpersonal connections between the lawyers. Whether the firm has brought on new laterals, recently merged, seeks more cross-selling or has suffered through tough times and needs to regroup, you should include programming that gets the right people working, eating and playing together.

Engage Them in Finding Solutions

Change is best achieved when those who need to change truly understand and are fully engaged in the process. While it is often helpful to bring in outside experts for certain purposes, the real work should be done by your lawyers. Using a mix of short presentations and effective facilitation, get your lawyers to identify, agree upon and prioritize key issues, gain consensus on what needs to be done and develop action plans. To get their full attention, make sure the issues pass the "what's-in-it-for-me" test. They should walk out thinking: "This was important to me. This will put money in my pocket, make me a better lawyer, make my group stronger and help me better serve my clients."

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Measure Your Culture

Often, law firms use assessment tools to measure specific cultural attributes in order to determine whether such attributes should be the subject of discussion during their retreats. For example, if management feels a culture of business development is lacking in the firm, the retreat planning committee can survey their attorneys and staff to measure their perceptions of how well the firm is doing in key areas.

Several years ago, I developed the Culture Xray®, an internal assessment tool that allows firms to measure their attorneys' business development involvement across 39 different dimensions. Armed with this refined "snapshot" of their strengths and weaknesses, firms can use this data to design a targeted retreat program to address their highest priority needs.

In analyzing the responses from 243 leaders from dozens of firms, it is interesting to see how firms perceive their own business development effectiveness. While most firms are comprised of extremely high performing attorneys, results show that organizationally, they have not achieved high performance when it comes to developing environments that support client development. The following are some examples of the results, which can be used as a basis for discussion during your firm's retreat:

Respondents rated their firms on a 1 – 5 scale:

1 = totally disagree with the statement

5 = totally agree with the statement

Cross-Selling

- **2.61** Our group effectively communicates our services to targeted firm clients who are not currently using us.
- **2.92** Our group effectively informs other groups in the firm about the services we provide.
- **3.07** Our group works well with other firm offices to pursue business development.
- **3.19** Our group works well with other firm practice areas to pursue business development.

Client Service

- **3.34** Our group actively solicits feedback from our most important clients.
- **3.35** Our group acts on the feedback we receive from our clients.

Leadership

- **2.66** Group members are held accountable for timely implementation of personal and group plans.
- **2.76** Our group effectively tracks our business development activity.

Training

- **2.59** Our group provides effective business development training for associates.
- **2.66** Our group provides effective business development training for partners.

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Training

Retreats can also be a great opportunity to teach people how to become more efficient and effective with their time. With the right training, you can develop a common language, agree on unified approaches, present best practices, get people to share their personal experiences and elicit commitments to take specific and measurable action.

After the Retreat: Action, Action and More Action

The acid test of a successful retreat is defined by what happens and what changes because of it.

Create teams responsible for accomplishing specific goals and start with small steps. Get individuals to understand their roles in carrying out larger group plans, give them personal tasks and timelines, tell them how they will be measured and let them know their actions will be watched and tracked.

Your leaders also have a critical role in the months following the retreat. They are responsible for keeping the implementation fires burning. They must be the watchers, the drivers and the communicators. They should be the reminders, find and report successes, celebrate progress and reward behaviors aligned with achieving initiatives.

Retreats can be transformational events. If you focus on the right goals, engage your lawyers in developing plans to achieve those goals, drill down to action steps and effectively manage ongoing implementation, you can get a tremendous return on your time, energy and investment in the retreat. ■

David Freeman, J.D., CEO of the David Freeman Consulting Group, has designed, led and spoken at scores of law firm retreats for nearly 20 years. He was recently voted the "Best Law Firm Business Development and Coaching Service Provider" in a 2012 National Law Journal survey.

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