



Keeping It Together

Law firm retreats represent unique opportunities for staff members and attorneys to tackle difficult issues, discuss the firm's direction, focus on strategic plans, and cultivate camaraderie and consensus.





BY ED POLL

Retreats and conferences offer great ways for a law firm's partners to focus on the organization's future by confronting tough issues. A retreat often can achieve more in several days than the firm could otherwise accomplish in months of fragmented meetings.

The reason why is simple: Retreats allow lawyers to separate themselves from the daily grind of billable hours – and from the distractions of their Blackberry™ devices and cell phones – to actually think about what they want to accomplish in the practice of law, and how best they can accomplish it.

A properly structured retreat can bring a firm's staff and attorneys closer together and create the momentum and unity to move forward in new directions. A poorly conceived and executed retreat, however, risks becoming an expensive boondoggle that can stir up resentment.

Law firm administrators inevitably play large roles in retreat planning and execution, and few things are more embarrassing (or hazardous to your career) than a disastrous firm retreat. Busy lawyers resist spending their limited free time on non-billable activities, and no one wants to face a flood of irate e-mails or voicemails asking, "Why did we waste our time on that?" Such reactions mean that the organization has lost a golden opportunity for its staff and lawyers to learn, bond, and become more successful.

How can you stage a successful retreat, one that moves the entire firm forward toward a better future? Actually, the part on which retreat planners often spend the most time – the logistics of facilities, budgets, and events – is only the second part of the equation. Before you answer the question of how to have a retreat, you first must ask why you're having it. A well-conceived approach to both questions is essential to a successful firm retreat.

SHORTCUT

In planning retreats for their law firms, legal administrators should take into account the key reasons for holding retreats, the best ways to structure them, and strategies to make them successful.

PART ONE: WHY TO HAVE A RETREAT

Organizers often cite three basic reasons for having retreats. All are important – and they are not mutually exclusive – but each requires a different planning focus.

- **Bonding.** The law firm needs a mechanism for bonding – among partners, between partners and associates, even between lawyers and spouses. A retreat can address this need when the firm has become so large and complex that its members no longer know or fully appreciate each other.
- **Planning.** The law firm either needs to make a change but is not quite sure what that change should be, or it needs to get behind a plan that has already been developed by the executive committee or the managing partner. A retreat can be a focal point for discussing the issues and reaching a consensus.
- **Communicating.** The law firm needs to focus on and understand the messages it conveys to current and prospective clients. A retreat can be a mechanism for clients to provide direct feedback on these issues and for firm marketers to introduce programs that address them.

RETREATS AND BONDING

People want to like the colleagues with whom they work, but three factors tend to hinder that camaraderie in today's large law firms: distance, compensation, and business model. Consider how a retreat can mitigate each of them.

- **Distance.** Lawyers who work together in an office environment should share a camaraderie that shapes the development of a firm culture. Many factors come into play, including the exchange of ideas and the education of one lawyer by another, among others. However, in many of today's geographically diverse megafirms, partners are that in name only, and governance of these large firms has fallen to a very few in the organization (the "management committee"). The remaining partners often begin to look, act, and think like employees, not

owners, and have little feel for partners outside their practice areas. An effective retreat, by bringing people together in a positive setting, can close this physical gap.

- **Compensation.** Many law firm compensation systems reward the star performers, but when rainmakers can be rewarded with compensation multiple times larger than that of other partners, distance is inevitable. By contrast, there is genuine intangible value in a sense of collegiality, in team building, and in delivering top-notch client service untainted by self-interest. A well-planned retreat can re-emphasize a shared sense of purpose in the firm, including an open discussion of financial performance that demonstrates "we're all in this together."
- **Business Model.** Very few associates in large law firms are satisfied these days. The current business model for these firms "eats 'em up and spits 'em out." This "culling process" gets cheap labor (yes, even despite what seem to be high salaries for the young talent) for five, six or seven years. Then, if they don't make partner, they're asked to leave to make way for the next group of law school graduates. Failing to reward them is a sure-fire way to build their dissatisfaction and to lose them – and the cost to the firm can be enormous. A retreat that emphasizes the value of associates and incorporates mechanisms by which they can discuss and present common concerns can be invaluable in assuring the firm's positive future.

RETREATS AND PLANNING

Many law firms struggle to get individualistic attorneys to create and accept a firm business plan. Such a plan doesn't have to be complicated. It can be as fundamental as identifying two or three desired business outcomes within a given time period, defining the behaviors necessary to achieve those outcomes, identifying whom to influence in order to get both the desired behaviors and the desired business results, and deciding how to influence them.



Retreats often work best when an **outside speaker** serves as the program **facilitator**. Select someone who will help your firm achieve its **strategic goals**, be a good philosophical fit with your lawyers, and **not embarrass** you by **failing** to grasp the complex idiosyncrasies of lawyers or your firm.

Successful planning comes from the top. The firm's primary rainmakers, the management, and managing partner all must be in concert, and all members of the firm must buy in. If the partners are not clear about the overall goals as well as specific objectives and strategies, then the planning process is bound to be sabotaged and of little use.

Firm retreats represent an ideal mechanism to accomplish this. Retreats literally get everyone together in one room where concepts can be discussed, ideas and questions raised, and acceptance established. A physical show of hands can be a powerful validation of the firm's new direction.

RETREATS AND COMMUNICATING

One fundamental principle defines the future of any law firm: Show your clients how highly you value them by how much you interact with them. Surveys show that the two biggest reasons for client dissatisfaction are unhappiness with law firms' approaches to client service (responsiveness and support, not legal advice) and failure to keep pace with clients' changing needs. Such law firms generally fail to communicate with their clients to learn what clients want, how they want to be served, and where the clients will be in the next one to five years.

One of the most direct and effective ways to solicit client feedback is through a client panel at a retreat. The agenda doesn't have to be elaborate. Invite three important (and willing) clients and ask them to answer these questions: "How are we doing? Should we be doing something differently? Do any issues concern you?" Given this opportunity, clients will provide you with honest answers, and participation at a retreat can make your clients feel like part of the team. It can also complement the firm-wide introduction of a new marketing approach – including Web site redesigns and new marketing collateral.

A retreat thus offers an ideal communication opportunity for the firm to learn what clients think and what new marketing tools can be used to reach more clients. The physical, in-person dimension produces results far beyond what can be accomplished through questionnaires and memos.

PART TWO: HOW TO HAVE A RETREAT

In organizing a retreat, it is essential that management – the executive committee or the managing partner – be involved from the start. If you, as firm administrator, have responsibility for the retreat, you must have the power of the firm behind the retreat for lawyers to take it seriously – especially because it will take them away from billable time. Once the management committee has blessed the idea and turned to you to make the retreat happen, you can subsequently turn to the groups in the firm that are best positioned to help: the marketing department to organize it, the human resources department to help with communication, and the facilities management staff for physical arrangements.

A retreat's requirements are considerable and often encompass things you may not have initially considered, including banners, signage, information folders, maps, commemorative giveaway items and presentations. The retreat planner also must consider the facilities, agenda, menu, and resources for meeting client needs (such as offsite office services or a communications center. Plenty of other issues warrant consideration as well:

- **Timing.** Allow a minimum of six months – ideally nine months or more – for planning a retreat. The amount of time often depends on the location of the facility you've selected, but the best locations that are most in demand can be booked years in advance. Also allow time to think about the important issues, develop the topics,

write or disseminate “white papers” as catalysts for discussion, and locate and secure outside speakers who can speak on the important topics.

- **Location.** The retreat’s location is a function of the issues you want to address. If it’s a serious agenda to decide the firm’s fate or direction, a location with numerous distractions – golf courses, beaches, casinos, nightlife, etc. – will not be conducive to accomplishing what you want. In such a situation, using a facility where everyone can be locked into a room without windows until they reach a decision may work best.
- **Budget.** Retreat budgets should be built from the bottom up rather than from the top down. Decide what you want to accomplish and the type of location you should select, and then establish a budget. You may ultimately need to make some cuts and changes, but all within the parameters of achieving your retreat’s purpose. Whatever the final cost, flexibility and focus on the retreat’s purpose remain essential.

- **Speaker.** Retreats often work best when an outside speaker serves as the program facilitator. Select someone who will help your firm achieve its strategic goals, be a good philosophical fit with your lawyers, and not embarrass you by failing to grasp the complex idiosyncrasies of lawyers or your firm. Whether the issue is marketing or mission, service or strategy, your speaker should leave behind interesting, challenging ideas and foster participants’ enthusiasm to accomplish them. As a speaker at firm retreats, I seek to offer specific, practical, usable information that lawyers can act on immediately. Lawyers are often intensely interested in such topics such as:
 - how to increase your client base;
 - how to manage client perceptions, expectations, and needs;
 - how to increase client referrals and reduce complaints;
 - how to communicate more effectively;
 - how to get bills paid on time and in full; and

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Retreats offer ideal communication vehicles for law firms to learn what clients think and what new marketing tools can be used to reach more clients. The physical, in-person dimension produces results far beyond what can be accomplished through questionnaires and memos.

understand the financial metrics for measuring and evaluating the firm's performance.

- **Agenda.** Your agenda can be as broad, but keep the retreat's overarching purpose in mind. A retreat can be a great venue for continuing legal education presentations, but not if the meeting's purpose is to decide the firm's fate and future. And if the sole purpose is to have a social occasion that rewards people for a successful year or that brings everyone closer together, training sessions won't have much appeal. If clients are invited for a panel discussion, it's a great opportunity to focus the retreat on marketing themes – which means the marketing staff should be involved as planners and presenters.
- **Technology.** Technological tools have come a long way to support the process of organizing and implementing retreats. Consider using project management software, posting information on the firm's intranet, or setting up a separate e-mail channel to communicate with everyone in the firm. Online calendars that display the latest schedules and newsletters to communicate and generate enthusiasm for the agenda are also effective tools that make life easier for retreat organizers.
- **Outside Resources.** Meeting Professionals International (www.mpiweb.org) has resources for retreat organizers, and the National Speakers Association (www.nsaspeaker.org) can recommend outside speakers. And, of course, many consultants are available (including my firm, LawBiz Management Company) to help plan and structure retreats. If you use a retreat consultant, he or she should have several years of experience at achieving the highest impact from events. The consultant can handle the planning and facilitation of the retreat, customized to fit your needs, including:
 - planning the logistics;

- working with the retreat committee to develop the agenda;
- speaking at the retreat;
- conducting breakout sessions;
- facilitating the preparation and presentation of "white papers" by practice groups within the firm and involving various contingencies in the firm, such as partners, associates, female lawyers, and lawyers of color, among others;
- debriefing with the organizing committee after the retreat; and
- providing follow-up coaching with selected firm members after the retreat.

POSTSCRIPT: WHAT IS A RETREAT?

Firm retreats are ultimately an exercise in marketing, with the focus on developing close relationships with people to achieve your mutual goals. During a retreat, the entire firm is marketing itself to its members – bringing together the people, ideas, and resources that make the practice of law worthwhile in that particular organization. Poor law firm marketing has been defined as "random acts of golf and lunch," and the same characterization unfortunately holds true for too many firm retreats.

A successful retreat is anything but random. You need a comprehensive plan: why are we doing this, what do we want to achieve, and how will we coordinate the resources to do it. Answer those questions, and a retreat will take your firm where it needs to go – positively into the future. ✱

about the author

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LEARNMORE

ALA Resources

The following articles are available in the *ALA Management Encyclopedia (ALAME)*, www.alanet.org/alame.

- "Promoting Communication: The Role of the Retreat or Planning Event"
- "Law Firm Planning Retreats: A Management Guide for Consensus-Building Activities"

The following are accessible via ALA's Legal Management Resource Center, <http://thesource.alanet.org>.

- "Retreat and Advance! Retreats Help You Build Teams and Look Ahead" by Bob Bookman – Type keyword "retreats" in the search engine
- "Planning a Successful Law Firm Retreat" by Marci M. Krufka – Type keyword "retreats" in the search engine
- "Planning And Conducting Retreats" by Joel A. Rose – Type keyword "retreats" in the search engine

On the Web

- Altman Weil, "Rethinking the Law Firm Retreat: Consider an All-Inclusive, Firm-wide Retreat for Lawyers, Paralegals and Support Staff" – www.altmanweil.com/dir_docs/resource/1e1b22ef-c6f6-4e72-9520-79f0735104b5_document.pdf
- Edge International, "Planning a Law Firm Retreat: Part I" – www.edge.ai/Edge-International-1058638.html

On the Shelf

The following titles are available for purchase or download through many online retailers, including www.amazon.com.

- *Retreats that Work: Everything You Need to Know About Planning and Leading Great Offsites*, by Merianne Litemen, Sheila Campbell, and Jeffrey Liteman
- *Retreats That Work: Designing and Conducting Effective Offsites for Groups and Organizations*, by Sheila Campbell and Merianne Liteman



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