

# Report to Legal Management

OUR 30TH YEAR

**EDITOR**

James Wilber  
Principal  
Altman Weil

**CONTRIBUTING EDITORS**

Ward Bower  
Principal  
Altman Weil

William F. Brennan  
Consultant  
Altman Weil

David G. Briscoe  
Senior Consultant  
Altman Weil

Thomas S. Clay  
Principal  
Altman Weil

James D. Cotterman  
Principal  
Altman Weil

Daniel J. DiLucchio, Jr.  
Principal  
Altman Weil

Virginia Grant  
Consultant  
Altman Weil

Marci M. Krufka  
Consultant  
Altman Weil

Charles A. Maddock  
Principal  
Altman Weil

Alan R. Olson  
Principal  
Altman Weil

Richard C. Reed  
Senior Advisor  
Altman Weil

Larry R. Richard  
Principal  
Altman Weil

**MANAGING EDITOR**

Susan D. Sjoström

## Planning A Successful Law Firm Retreat



Marci M. Krufka

By Marci M. Krufka

**R**etreats can be very positive experiences for law firms. Lawyers walk away excited about new opportunities they discussed and energized by the improved relationships they developed. Retreats can also be dreadfully boring, very expensive, quickly forgotten events. This article discusses the key factors that provide the difference between the two: effective planning, having an objective, and some creative ideas to make the retreat fun.

### PART I — RETREAT PLANNING BASICS

#### Timing

On several occasions, I have received calls from law firms asking me to help with a retreat occurring in three weeks, even two weeks. A word to the wise: planning an effective retreat takes more than just a few weeks.

There are many factors that influence how much time you will need to plan your retreat. These include the time you have available for the retreat, budget considerations, the size of your firm, your experience with prior retreats and, of course, the location. Most premier, or even suitable, locations require reservations several months in advance for the block of guest rooms as well as the meeting rooms.

Most effective retreats require two to four months of planning. You will need this time to gather information from within the firm and from outside sources, develop an agenda, communicate roles to participants who will be presenting or who will be facilitating breakout

groups, develop and distribute the written retreat materials, arrange for outside assistance and handle the logistics (reservations, transportation, social activities, meals, etc.).

#### Who Should Plan the Retreat?

Planning a retreat is more than a one-person job. Typically, a committee with approximately three to six members works best. The committee may include the administrator, the managing partner, other members of firm management, practice group leader(s), the marketing director, and/or junior lawyers. The committee is responsible for handling all of the planning items mentioned above, including developing an agenda, developing the written materials, arranging outside assistance, etc.

#### Who to Invite

Obviously, who to invite depends largely on the topics to be discussed and the budget. If you plan to discuss sensitive issues (compensation, assessments of the firm's practice mix, recruiting strategies, etc.) invite partners only. Or, have a partners only meeting before

*continued on page 3*

#### Inside This Issue

Paralegal Managers, Specialists	
Earn Top Dollar, New Survey Reports . . . . .	2
Succession Planning for Law Firms . . . . .	4
Conducting Effective Associate Evaluations . . . . .	6
Proven Techniques for Relationship Building . . . . .	8
News from Altman Weil . . . . .	11

**Planning a Retreat ...** *continued from cover*

the associates arrive. If you have the budget and are discussing firm strategy, building consensus for new initiatives, trying to improve marketing efforts or conducting training, invite associates. Retreats go a long way toward integrating associates into the firm.

It is also important to invite your professional managers to the retreat — the administrator, marketing director, director of professional development, practice group administrators, etc. Their input is invaluable.

**PART II — HAVE AN OBJECTIVE; DEVELOP THE BEST AGENDA**

*If you take nothing else away from this article, please remember this: have an objective for your retreat!* Okay, even two or three objectives are acceptable, but, going in, know what you want to accomplish during the retreat and after. Having a two-day information dump is fine. Making your retreat your annual business meeting is fine as well. You are investing a significant amount of money and lawyer time, however, so make it worthwhile. Lawyers can *read* whatever information you want to relay. You can hold an annual meeting in your office. But a retreat should be a time for the lawyers and other professionals to build relationships, discuss one or a few significant issues and develop some action steps to implement when the retreat is over.

The agenda should be developed after you have decided on your objectives for the retreat. Most retreats last one to three days. Work sessions should be limited to no more than six hours per day. After six hours, it is very difficult to hold people's attention and elicit meaningful participation.

In your work sessions, stick to your objectives and avoid including too many topics. I have been asked to participate as a speaker at retreats where eight-hour agendas are jam-packed with 30- or 45-minute sessions

on a variety of topics. While the ability of these firms to cram so much information into a day-long meeting is somewhat admirable, most lawyers walk out of the meeting wondering what the purpose was. Deep, meaningful conversations on a limited number of topics are much more effective than little or no discussion on a large number of topics.

---

***“... a retreat should be a time for the lawyers and other professionals to build relationships ...”***

---

Don't feel the need to include segments just to fill time (“We have the meeting room for seven hours, so we have to fill every single minute!”). Again, less is more, and people will be more satisfied with a few, good discussions than an entire day of talking heads.

The best way to develop an agenda people will be excited about is to ask participants what they would like to discuss at the retreat. A simple questionnaire or other method of polling partners can generate ideas for a thought-provoking agenda people will appreciate. Buy-in before the retreat makes it more likely all those great retreat ideas will be implemented afterward.

Finally, don't forget about the social activities. The primary benefit of a retreat is often the building of relationships that occurs when lawyers are away from their telephones and e-mail (if you can pry their cell phones and BlackBerrys away!). In addition to allowing for some free time, include planned social activities — meals and recreational activities — in the agenda.

Remember, not everyone is a golfer. On behalf of those in the firm who are not scratch golfers, think spa.

**PART III — RETREAT OBJECTIVES THAT ARE USEFUL AND FUN**

The remainder of this article will discuss some proven examples and creative ideas for retreat objectives. The list is not all-inclusive. Rather, it is an attempt to give you some ideas for retreats that are educational, effective and fun.

**Strategy Development**

Firm-wide strategic planning, done right, involves several important steps. The first is significant information gathering and analysis: financial information, profitability information for the firm and for practice groups, input from firm members, feedback from clients and market research. Next is the development of rational strategies and tactics for implementation. Following that is the communication of these strategies and tactics, and participation at all levels in implementation.

It is nearly impossible to condense the entire strategic planning process into a two-day retreat. You can use the retreat, however, as an opportunity to:

- accomplish some of the steps in plan development (e.g., getting input from firm lawyers)
- kick off the strategic planning process and discuss a few key strategic planning issues
- roll out the strategic plan and discuss strategies for implementation

The retreat can also be an opportunity to discuss practice group strategies. As firms focus more on practice group management, however, it is increasingly common for practice groups to hold their own retreats or off-site meetings for strategy development. If you do use a portion of your

*continued on page 9*

**Planning a Retreat ... continued from 3**

firm-wide retreat for practice group issues, be sure to design other group discussions with a mix of members from different practice groups.

Many firms dedicate entire retreats to the development of marketing strategies. These retreats can be

the firm will take over the next year to provide additional value to clients and improve relationships.

Finally, consider having a client panel discussion at your retreat. Invite three to five of the firm's key clients to speak at the opening of the retreat (and, of course, pay their travel and

discuss can include overall firm strategy, practice group/industry group strategies, marketing strategy, changes in partnership/operating agreements, changes in firm governance, changes in the structure of the firm, succession planning, or any other issue that is important to the firm at the time of the retreat. (Remember, your objective should be to build consensus around only one to three main issues!)

The key to effective consensus-building will be the design and facilitation of your large and small group discussions. If you do not have a trained facilitator in-house, you should hire an outside facilitator to help develop the agenda, structure the discussions and facilitate the retreat.

A few tips on consensus-building discussions:

- Don't ask each small group to discuss a different topic. The key word here is building *consensus*. All groups should discuss the same issues. You may have some repetition in discussions on the topics, but the appropriate balance of repetition and affirmation is exactly what you need to get folks on the same page.
- Don't be haphazard about which lawyers you select to lead the breakout group discussions. A bad group leader can really hurt the experience of the group members and the success of the group. Make sure you select lawyers who are respected and have good credibility throughout the firm. To be good discussion leaders, they should have low egos and be non-judgmental.

**Education**

There are a number of educational programs you can conduct at your firm retreat that the lawyers will enjoy and from which they'll learn. Three popular types are described below. If you are going to have educational or training programs at retreats, make sure they are interactive.

*continued on page 10*

---

**“Clients are typically flattered to be asked to participate in retreats. They provide extremely valuable information ...”**

---

very effective, but as mentioned, while practice group marketing is critical, make sure that lawyers interact with others from within and outside of their practice groups. Firms often talk about cross-marketing; your retreat can be an opportunity to do something about it.

**Client Service**

As mentioned, seeking feedback from clients is an essential element of strategic planning. Improving client service can be part of a strategic planning retreat or can be the sole topic of a retreat.

For example, you can conduct a written client satisfaction survey, and the results of the survey can be shared at the retreat. Lawyers can use specific client feedback in group discussions to develop strategies to improve client service. Practice groups and industry groups can also have discussions about how to respond to opportunities for additional work mentioned by clients in response to surveys.

You can also use part of the retreat to develop key-client service plans. Interviews can be conducted with key clients prior to the retreat. The results of those interviews can be used as the focus of group discussions, the result of which is a plan with specific action

lodging expenses). Ask them to prepare a ten-minute overview in response to questions similar to the following:

- Briefly, what changes do you see in your company and industry?
- What service factors are most important to you when working with a law firm?
- How important are responsiveness, knowledge of your business, experience, brand name, cost?
- Thinking of the law firms you use most, or over the longest period of time, how have they built a higher level of trust with your organization?
- Has a law firm really gone out of its way for you? What did it do?
- What would make you fire or switch law firms?

Clients are typically flattered to be asked to participate in retreats. They provide extremely valuable information, and the firm has an opportunity to strengthen relationships.

**Consensus Building**

Many law firms are still consensus-driven organizations. Retreats provide a great opportunity to build consensus around important firm issues. Everyone is together in a relaxed setting without the typical distractions. The issues you

**Planning a Retreat ... continued from 9**

Listening to a speaker or trainer for six or more hours is painfully dull, and you will lose the benefit you gain from having the lawyers interact.

**Sales Training**

Firms are very interested in improving their lawyers' skill sets with regard to marketing and sales. Poll the lawyers to identify specific skills they would like to develop. Work with the retreat facilitator to design a program that will focus on the areas in which your lawyers are interested. Recognize that everyone has different competencies in the area of marketing and sales and allow for some flexibility. These programs can be very useful and fun, and they can take away some of the negative perceptions lawyers have regarding the "s" word.

**Organizational Development**

Retreats focusing on organizational development issues, such as lawyer personalities and emotional intelligence, are very enjoyable and extremely

beneficial for working relationships in the firm. They not only increase self-understanding in lawyers, but they also increase the understanding of the group about how to work more effectively together. These retreats are useful in aiding merger integration efforts and in conflict resolution situations. They are also good for any firm that wants to focus on firm culture — a critical success factor — and on improving firm performance.

**Core Values and Principles**

Firms are focusing more than ever on their core values and principles. This type of retreat also focuses on "softer" issues relating to firm culture. The impact, however, can be seen not only in working relationships, but also in firm profitability. If the program is structured correctly, the discussion will be much more than mere platitudes. The lawyers will leave with a sound understanding of firm values and what impact those values have on their practice; and management will have some guidance as to what behaviors

they should be prepared to manage, measure and discuss going forward.

**Just Plain Fun**

Consider having a humorist speak at the retreat. There are a number of interesting, entertaining speakers who tailor their performances specifically toward lawyers and law firms. Humorists provide great after-dinner talks that will lighten the mood and have everyone laughing into the evening.

**CONCLUSION**

With the proper planning, design and facilitation, a firm retreat can provide a significant opportunity to improve not only the profitability of the firm, but the relationships between its members. Remember: give yourself enough time to plan, have an objective, and have fun! ♦

**Marci M. Krufka** is a consultant with Altman Weil, Inc., working out of the firm's offices in Newtown Square, Pennsylvania. She can be reached at (610) 886-2000 or [mmkrufka@altmanweil.com](mailto:mmkrufka@altmanweil.com).



"Let's keep in mind that although quitters never win, they sometimes do manage to avoid litigation."