Stepping Back to Step Ahead
How to Get the Most from Your Firm's Annual Retreat

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Retreats let professionals step back from the daily demands of working in the business to work on the business. They are a rare and precious opportunity for the firm to treat itself like its own best client. By themselves, retreats are not a magic wand – just one element of firm strategy and good leadership. But when done right, a retreat can go a long way to boosting morale, defining or reinforcing strategic direction, getting buy-in to change, fostering communication, encouraging cross-selling and a host of other benefits.

Despite a considerable investment in time and money, many retreats fall short of their potential. Have you ever received comments like:

- *Getting together was great, but I'm not sure we really accomplished much.*
- *Sorry, but I've been too busy to do anything on that project.*
- *We were going in circles – everyone just kept saying the same old things and in the end, nothing changed.*
- And the one I particularly like . . . *Oh, was I supposed to do that?*

No doubt, you can probably expand the list. So, how do you move towards a retreat that elicits better feedback – one that is highly productive while it is underway and pays dividends afterwards? A three-stage process works well:

1. **Groundwork.** Defining priorities, then planning and setting the stage for success.

2. **Conducting** the retreat in ways that entertain, engage and encourage participants.

3. **Following-up** to ensure that ideas and plans are put into action.

1A. Groundwork – Defining Priorities and Planning

Woody Allen said, *eighty percent of success is showing up*. If he had been talking about retreats he should have said, *eighty percent of success is showing up prepared!*

The reasons for and manner of holding business retreats vary from firm to firm, but one truth is constant everywhere: the better planned the retreat is and the clearer its purpose, the higher the value that will be derived and the happier participants will be that they attended.

Too often the planning approach consists of dusting off last year's model and putting on a new coat of paint. Doing this can work once or twice. In fact, it might even be the best solution at the time. But the method is not sustainable. The audience changes, priorities shift, clients develop new needs and unexpected issues emerge. So it's important to refresh your approach according to the realities of the day.

The very first step is to put a specific person in charge of planning the retreat – either you or another Partner. The earlier you do so, the better. Then a task team should be assembled. Widespread participation can be great but, all things considered, a small group will likely be more effective than a large one.

Form will follow function, so don't worry about the retreat agenda yet. Concentrate first on taking stock of the firm's most important issues. Many of them are likely top-of-mind with you and the Management Committee. But you might not know all the issues, nor should you presume that everyone else would rank their relative importance the same.

The techniques for fleshing out key issues will differ among firms. For a small practice, simply making time to brainstorm with your colleagues might suffice. On the other hand, larger firms are likely to benefit from a more thorough, systematic approach. It could include a combination of confidential surveys, focus groups or one-on-one interviews.

At this juncture, think about the possibility of engaging an outside consultant to help before, during and after the retreat. The right one will see issues from an independent and fresh perspective, and can act as a catalyst and facilitator to keep everything moving forward. If you choose this route, the sooner you act the more value the consultant will be able to add.

Your research will likely lead to a wish list of topics that is too long. Before inclusion on the agenda, the potential topics have to pass through two filters. First, you have to prioritize a short list of the most important issues. Keep in mind that issues are often interdependent. Several that appear to be separate might actually share a common root. Then from the short list, you need to strain out the items where substantive progress can be accomplished within a retreat context. Generally, the aim is to sift down to two or three focus issues, but no more.

Now you need to write down goals. Just how much do you want to accomplish on each focus topic? Say the topic at hand is better lock-up management (the value of unbilled work-in-progress and receivables). The goal statement might be something like: *By the end of the retreat everyone will fully understand the importance of lock-up management, will know what is expected of him/her personally, and we will have developed a firm-wide action plan to achieve agreed targets.*

Temper your expectations on certain issues, even critical ones, or simply leave them off the agenda. The retreat might not be the right time and place. Say the topic is a revised profit sharing scheme for Partners, the concept has never been broached, only two hours are allocated and the aim is to agree on a new plan. I bet you will recognize this as a recipe for disaster! What was planned for two-hours could easily consume the whole agenda. Or you will have to terminate discussion early, leaving Partners feeling uneasy and left out. So, don't set out to build Rome in a day and be careful not to imply that is the intent.

After deciding upon the focus issues and defining the goals, go back to stakeholders and seek concurrence. One way to do this is to send out a short memo asking for feedback. Another is to raise the topic at a regularly scheduled event, like a monthly Partners' meeting. As in all things, aim for consensus not unanimity. Although not all people will agree with the direction chosen, everyone needs to feel they've had their fair say.

By now, you have identified the retreat's focus topics, have set goals for each and have buy-in from the Partners. However, you won't be able to dedicate the entire retreat to the focus topics. In most cases, you will also need to spend time on aspects like:

- Recreational activities to foster relationships among colleagues.
- An educational element.
- A general meeting component where, for example, financial performance is reviewed, new Partners are nominated, a Management Committee is elected, certain administrative decisions are made and so on.

The firm's size and culture, governance system, current circumstance and maturity are a some of the factors in deciding how much time is apportioned to each of these aspects – and the mix should be adjusted from year to year. Perhaps the firm has been doing very well, the Partners are simply worn out and they do not have an appetite for many heavy issues. If so, weight the recreational component more heavily. Conversely, there will be times when the work side of the equation needs to be emphasized.

Taking into account all of the preparation you have done so far, now is the time to draft an agenda. Here are some tips that might help:

- Start the formal agenda with an outline of the retreat's objectives, and then conclude the retreat by assessing how well these have been met.

- Schedule the tougher issues early and don't be afraid to break them down into digestible pieces spread over a few days. Doing this provides participants with an opportunity to incubate their ideas and informally bounce them around between work sessions.

- It's generally better to slot a recreational activity in the middle of the agenda, not the beginning or end. Otherwise, people may be tempted to arrive late or leave early.

- Often individuals or practice areas are called upon to give a brief update – usually 10 minutes or so – on their activities over the past year. Ask them to concentrate on presenting information and stories that the group would not otherwise know. And rather than doing the updates back-to-back and having them all sound the same, sprinkle them throughout the agenda for variety. It might even be fun to select the presenter by holding a random draw whenever the timing feels right.

- Make sure you leave some wiggle room. If in doubt, err on the side of allowing too much time for an agenda item and reserve space for overflow or unexpected items that arise during the retreat.

- Ensure that a specific person is assigned to prepare for and moderate each agenda item – and that each leader has a sub-agenda prepared for his/her area.

- When dealing with complex issues, try to keep groups to a workable size. The usual approach is to carve out components and assign each to separate breakout groups that report back to the larger forum. Pre-assigning leaders for each breakout group is usually more efficient than leaving the group to decide.

- Be explicit (but succinct) when describing each agenda item. For example, avoid using a bullet that simply says *Partner Compensation* when what you really mean is *Partner Compensation – food for thought and an exchange of ideas about improving our current system.*

1B. Groundwork - Setting the Stage

By now, you and your task team are well prepared for the retreat. But what about the other people who will be there? The more of them who arrive with an awareness of the issues – and the deeper their understanding – the more likely you are to have a productive retreat.

To start, remind everyone well in advance of the retreat dates. The dates and venue were likely set up at last year's event, but people very often forget. Afterward, get out the agenda as soon as it has been finalized.

Prepare and distribute a briefing package covering the retreat goals and key issues, especially the ones that are likely to stimulate debate. The key is to strike a balance between too little information and too much. Here, the white-paper approach can work very well. Have the leader of each session distill the situation, key considerations and options into a paper done in the style of an executive summary. In most cases, it's not necessary (nor advisable) to present a specific recommendation or opinion – just bring clarity to the issue at hand. Avoid attaching old working documents (especially ones that don't have a constructive tone), large data tables, journal articles and so on. They are more likely to sidetrack or dissuade the reader than to add real value.

An added benefit of the white-paper approach is that the writing exercise compels the writer to crystallize the subject matter in his/her own mind. This results in him/her being much better prepared to facilitate the group discussion when the time comes. The gain is definitely worth the pain.

To improve the likelihood that the briefing material is reviewed, send it out as a consolidated package, not as bits and pieces. The package puts all participants on an equal footing – or at least affords them that opportunity. Everyone gets the same information, the same way and at the same time. No one has the inside track on an issue. Partners are well informed and feel included equally in the decision making process.

2. Conducting the Retreat

Before they arrived, you have told participants about the retreat's content, the focus issues and goals. **The very first thing to do when starting the retreat is to tell them all those things again**. Memories fade quickly and, despite your best efforts, some people will not have reviewed the preparatory material. The facilitators of each session should take a similar approach to framing their individual topics at the outset.

Set out the ground rules. No doubt you have heard these before: *all opinions count, everyone gets equal airtime, no sniping, dwell on solutions not problems and so on.* The rules may not be new but they are worth repeating.

For each agenda item, be sure to assign a facilitator whose skills are up to the task. It's usually more important that facilitators be good at managing group dynamics than that they be experts about the subject matter. Of course, having the best of both worlds is ideal. If you are dealing with a particularly critical issue, consider hiring an outside specialist to help out.

Appoint a scribe to take notes. The aim here is to simply record the salient points, not produce a court transcript. A technique that works well is to use a laptop computer and LCD projector to display notes in real time. That way participants can avoid repeating what's already been said and you will have a ready-made set of notes afterward.

Even with good planning and facilitation, a runaway issue may develop. Maybe it's a good runaway because the group is finally on the cusp of a solution to a nagging problem. If so, you won't want to lose momentum by switching to another topic. But, if the group is simply bogged down, the best solution may be to cut things off and pick them up later. As previously mentioned, try to build wiggle room into the agenda to accommodate possible time overruns and split sessions.

If the goal was to have a written action plan at the end of the session, be sure you do. The plan need not be elaborate but should capture what main steps are needed, who is responsible for each step, to whom are they accountable, what are their deliverables and when are the deliverables due.

Wrap up the retreat by assessing if its goals have been met and highlighting the progress that has been made. Ending things on a high note is important. Take time to accentuate the positive and remind people about following-through on their commitments. A short PowerPoint presentation could be very effective and can be prepared quickly, particularly if you have been drafting it while the retreat was in progress.

3. Follow-up

Although everyone was in the same place and heard the same things, their recollection of the details can begin to fade and change within a few days. Strange, but it seems that the people who volunteered to do something are often the first to forget. You need to get a summary report to the participants quickly. Short and swift is better than long and late. If you had wrapped-up the retreat with a comprehensive PowerPoint presentation, perhaps handouts from it would suffice.

Depending upon the material covered and outcomes, you might also send a brief summary to firm members who did not attend the retreat. They are probably interested in hearing what happened, if they might be affected and how they might contribute to any new initiatives. Publicly naming the person who has been charged with a particular initiative can also help reinforce accountability.

Soon after the event, sit down with your planning team to do a post-retreat evaluation. What worked, what did not and how can next year's retreat be improved? Make notes and review them when planning gears up again.

Pay attention to the progress of others and hold them accountable. A nudge here and a poke there may be all that it takes. Or perhaps asking for regular progress reports and then circulating them will help. No matter what the tactics, people must get the message that they are expected to deliver on commitments made at the retreat.

Conclusion

Retreats can be a very potent tool for firm leaders and fun at the same time. The main ingredients in the recipe for success are thoughtful planning, concrete goals, effective facilitation and timely follow-up.

I hope this white paper has been helpful and encourage you to pass it along to anyone else who could be interested. If you have comments, questions or wish to discuss your firm's needs, I would be very pleased to hear from you.

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