

EFFECTIVE FIRM RETREATS MIX BUSINESS WITH PLEASURE

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Thoughts of firm retreats may conjure up visions of social activities and resort-style relaxation. Although a retreat can live up to this vision, it can be an effective communication and planning tool, given proper preparation.

A retreat committee should be selected approximately six months before the retreat. The committee should represent a cross-section of the partners and include the firm administrator. If associates will be invited, an associate representative should serve on the committee. It should immediately choose the retreat date and facility.

A retreat chairperson must be chosen. This person should have strong leadership and facilitation skills, and should remain impartial to encourage discussion and build consensus. Law firms basically choose the chair of the retreat committee or the firm's managing partner as the retreat chairperson. The firm's administrator should handle the details regarding facility, food and social events.

If the retreat will consist of spirited discussion, an outside facilitator should be hired. To be effective, the facilitator should be involved in the retreat committee, help plan the agenda and get to know the firm firsthand.

The next step is to set the agenda. The agenda can include development of a mission statement that expresses the firm's past and future; an internal look at the firm's strengths and weaknesses; an external look at trends affecting the legal profession; client satisfaction; and the competition.

If associates are included, a portion of the retreat should be educational. Invite a guest speaker to talk about such topics as marketing, client communications, or stress management.

It is imperative to hold the retreat away from office distractions, but no more than a three-hour drive away. Resort facilities add a nice touch, but make sure that the meeting rooms are adequate to hold business meetings. As tempting as the golf course and spa may be, these may not be the right atmosphere to conduct business.

As retreats mix business meetings and social activities, they should occur on a weekend - perhaps with a Friday evening social gathering. Entire weekend retreats usually include spouses and significant others, with activities scheduled for them while the attorneys are attending the business meetings.

Business sessions should start on Saturday morning and last no more than three hours each. There should be a one-hour lunch break, followed by an afternoon session. Saturday evening should be reserved for a firm dinner.

Sunday morning should be set aside for a half-day session to finalize the agenda items, make assignments and determine accountability for projects. The rest of Sunday should be open for golf, tennis, socializing or early departures.

On Monday morning, when everyone is busy forgetting about the retreat, the retreat committee should prepare a report that details the decisions, assignments and project deadlines made at the retreat. Without follow-up and accountability, the work done at the retreat will be forgotten - until the next time someone suggests it's time for another retreat.