



Charles A. Maddock

Retreat, But Don't Surrender

By Charles A. Maddock

Your firm's retreat can be a memorable event. But without planning and by making the wrong assumptions, it can be memorably bad. To assure the success of your next event, avoid the common mistakes outlined below:

- **Theme?**

We don't need no stinkin' theme. One way to make sure that your retreat fails is to try to deal with too many topics. Successful retreats focus on one or two issues a day, tops. Consider breaking your agenda into modules, each with a one-two-three punch: presentation of best practices, group discussion, and action steps. If the modules can be linked by an overarching theme — growth, client satisfaction, or associate retention, for example — so much the better.

- **Lunch is for wimps.**

Unless Gordon Gekko, the Michael Douglas character in *Wall Street*, runs your firm, you'll need to plan for breaks and food. Don't skimp. Access to energizing meals and snacks — consider fruit and juice instead of those huge snooze-inducing chocolate chip cookies — can make a significant difference in attendees' bio-rhythms. And that means better participation and higher satisfaction.

- **Who cares where we hold it?**

We'll be inside all day. Just as with real estate, the three words to remember are location, location, location. Is the retreat a working session or will there be recreation? Are spouses invited? Most important, is there opportunity to get together socially? Bonding is good. Golf, cocktails, dinners, even schmoozing by the pool can be just as important to the success of the retreat as its content and achievement of goals.

- **Why ask?**

We know what we want. A surefire way to have your retreat bomb is to build the agenda in a vacuum. Instead, consider sending a questionnaire to the firm's lawyers to identify the theme and key issues that should be managed at the retreat. This will help assure buy-in and

participation. At the retreat, remind participants how the agenda was developed. Then go around the room (if there are no more than 20 participants) or ask for volunteers to define their expectations for the retreat. This sets the stage nicely, clarifies objectives — and should be referred to again at the end of the retreat.

- **Let's get a speaker.**

Firms sometimes make the mistake of hiring a subject expert who is inexperienced in retreat management or a consultant who knows her field but not the firm — and doesn't take the time to learn. Remember, it's your retreat. The consultant's role is to set the stage with knowledge, apply his or her expertise to the firm, then encourage and manage discussion. Despite the fact that your lawyers will rush to sit in the back, the retreat is not law school. Successful retreats encourage participation, not lecture.

- **If nine to three is good, eight to five is better.**

Ambition is a good thing, but too much ambition leads to wear-out and disinterest. Retreats are (or should be) intellectually challenging events. But even the most stimulating retreats tend to lose participation after two or three in the afternoon. Later in the day, participants go through the motions, agreeing with others just for the sake of agreement while they furtively check their watches or cell phones for messages. Getting the most from the retreat calls for planning, not forced marches. No one was ever disappointed by meetings that ended early if goals have been reached and next steps identified.

- **If three follow-up steps are good, 30 is ten times as good.**

Wrong. Some retreats are like some meals: satisfying at the time, but completely forgettable one hour later. This is especially true if too many next steps are identified at the end of the retreat. The KISS (Keep It Simple, Stupid) principle applies. At the end of the sessions, identify the most achievable next steps and keep the number of steps small. The real success of a retreat is what happens Monday, not how many actions

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we over-promised ourselves on Saturday or Sunday. Participants should be able to clearly and simply articulate the strategies and change items that were developed at the retreat, the next steps and their role in the process.

Why have a retreat anyway — because all the other law firms on the block are doing it? No. The best retreats occur when a firm has clearly defined, agreed-upon and manageable goals. And it doesn't hurt if it's in the Bahamas. ♦

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