



Week of **October 21, 2008**

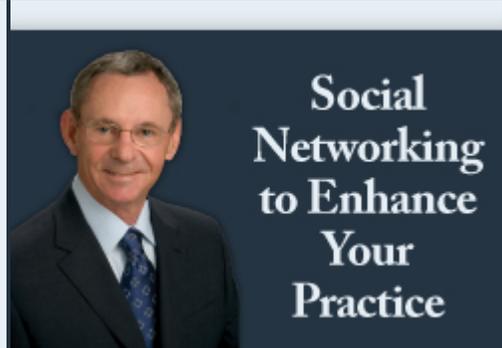
## Law Firms Can Advance with a Retreat

Lawyers who are together physically in an office environment share a camaraderie that shapes the firm culture. If problems or issues develop in running the firm, the partners can gather in a conference room and resolve them. However, in today's large, geographically diverse law firms, "partners" often do not know or recognize their colleagues from other offices. Human beings are social animals who generally want to connect with each other. One way for a large firm to facilitate that connection is too often dismissed or misused: an [all-firm meeting or retreat](#).

Law firm retreats are unique opportunities to confront tough issues, change the firm's direction, focus on a strategic plan, and develop camaraderie and consensus. A properly structured retreat can bring the firm closer together and create the momentum and unity to move forward in new directions. A poorly conceived and executed retreat risks becoming an expensive boondoggle (one lawyer told me her firm's budget for a full retreat was more than \$10 million) that can stir up active resentment. The best way to avoid that is to emphasize the real, tangible benefits a retreat can convey.

Attendees at a retreat have the opportunity to learn each other's skills and strengths so that they can better rely on one another to deal with a particular problem for a particular client. For example, if you regularly handle a client's labor matters and the client suddenly has an antitrust problem, you can recommend a colleague from another office who you met at a retreat. You know they're good and personable, and you're comfortable that they would do well for your client.

Another practical retreat benefit is education—sharing ideas on how to treat and serve clients better. Often firms invite corporate counsel or important clients to have a panel



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**What Readers Are Saying...**

**Keynote speech is the "highlight" of Bar Association training seminar**

discussion at the retreat concerning what they like about the firm and what they wish to see changed. If both senior management and an outside facilitator are part of the retreat programming, they can use such input to generate positive and significant improvement in what the firm does.

This is not to oversell what a retreat can accomplish. A common misconception that breeds cynicism about retreats is that they can remake the world in a two-day period. Retreats are simply a beginning, whether an analysis of one or more firm challenges, or an effort to improve cross-selling relationships, or a comprehensive firm strategic plan. That makes it vital for firm management to have a debriefing session very soon after the retreat to assess what happened and to develop a follow-up plan.

A good way to start the firm retreat process is to develop white papers before the retreat. Committees of lawyers can be responsible for papers on such issues as integration of lateral partners, enhancing diversity, retaining lawyers, and any other issue facing the firm and selected for discussion at the retreat. The committee papers, reports by the committees summarizing the points of the discussion and agreement, if any, by the firm achieved at the retreat can shape management's retreat follow-up, and serve as a benchmark on what that follow-up accomplishes. Take such an approach, and your retreat will take your firm where it should go—healthily into the future.

Best wishes,

Ed Poll

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"Ed's presentation, in my opinion, was the highlight of this series of speakers. I found the information which was presented to be tremendously valuable. Further, it was presented in a format which was both usable and interesting. Since Ed's presentation, I have had an opportunity to speak with several others who were in attendance and it is clear from them that he made our event successful."

*-David R. Hagen, San Fernando Valley Bar Association*