

## A Retreat That Can Advance Your Firm

By Kimberly Alford Rice

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Does the word “retreat” conjure up a negative picture in your mind? It always has in mine.

Though it is just semantics, studies show that the more a law firm (lawyers and staff) comes together to discuss pressing issues which affect the actual business of the firm as well as to engage in team building and to strengthen camaraderie, the more successful the firm, regardless of size.

When is the last time your firm put aside its daily work and client demands and came together to discuss and brainstorm the firm’s direction, its future, and common growth goals which extended beyond a partners’ meeting?

With so little time to devote “on” the practice as compared to “in” the actual practice, planning a firm retreat can be a productive way to effectively address challenging issues, focus on developing a strategic business development plan, and build stronger relationships. A successfully custom-designed retreat can aid the firm in re-focusing its efforts and achieve more than it thought possible.

Savvy law firm leaders understand that retreats can be powerful tools which can generate and motivate firm action. It can inspire new strategies, prompt decision making, and serve to secure commitments to take strategic action. A successful retreat can be a catalyst to jump start positive change.

Even the smallest firms and solo practices can benefit by scheduling a designated period of time (from a half day to several days) to focus exclusively on critical practice issues to advance their firm’s growth. The more successful firms realize the imperative of working on their business to advance it forward.

With the involvement of firm management to develop a clear understanding of the desired accomplishments and a concise agenda outlining the critical issues to be addressed, participating lawyers can often walk away with a renewed sense of direction and commitment to accomplishing common firm goals.

What follows is a brief outline of the components for a power-packed retreat:

- **Engage firm leadership support.** Senior partners and management must be prepared to stand behind retreat goals and ongoing implementation. This is largely a cultural test for driving unity among participants.
- **Create an environment for future thinking.** A properly planned and facilitated retreat is a perfect time and place to get crystal clear about a firm's short and long-term objectives, the obstacles standing in its way, and concrete actionable steps to take to move the firm forward in its goals.
- **Assemble your Dream Team.** Whether you select successful rainmakers and senior partners to deliver presentations on specific retreat topics, many firms find retaining outside presenters can stimulate and motivate your group, sparking new and practical ideas they can use to create positive momentum.
- **Incorporate work and play.** There's no better recipe for firm retreat failure than corralling a group of lawyers and forcing them to feign interest. By infusing a retreat with fun and interactive exercises, lawyers can discover how they can work productively together to create a better firm.
- **Bring on breakout sessions.** Beyond the larger firm presentations and "state-of-the-firm" speeches, the smaller breakout session is where the real work is done. Folks roll up their sleeves to engage in specific strategic and tactical planning. Often, groups break off into their practice areas to discuss common marketing and industry-specific goals and plans.
- **Keep it moving with thorough follow up and ongoing implementation.** The successful and productive retreat ignites what is required to affect positive change. Like so many other things in business, it is the follow up and ongoing implementation by which the impact of a retreat is measured. What will change? Who drives the change? One of the greatest retreat objectives is to develop crystal clear action steps to support ongoing implementation of initiatives resulting from the work done during the retreat. Establishing specific accountability, reasonable time lines, and measurable accomplishments is imperative to elicit attorney compliance.

- **Maintain the Momentum.** Embracing the hard work, tough decisions and goodwill generated to maintain the momentum following a successful retreat is frequently the most challenging task. To keep the momentum moving forward, firms should communicate frequently to highlight successes of initiatives accomplished since the retreat. You may also want to schedule regular check-in sessions and maintain a transparent follow-up and tracking system. There are many effective tools to aid in building on a successful retreat.

Some of the most effective retreats we have led were designed to address business development and marketing goals. Depending on the firm's needs, topics which firms benefit addressing in a retreat setting have included:

- Firm wide marketing goal setting
- Practice area and individual lawyer marketing planning
- Client service strategies
- Networking best practices
- Attracting higher quality clients
- Closing the "sale"

One of the most effective strategies for optimizing firm performance is to take a step back from day-to-day client work and bring your team together for a focused retreat that results in moving your firm towards its most important goals. By applying some of these points above, you can transform one high impact event into an instrumental tool for driving greater prosperity and performance in your firm.

