

THE LAW FIRM RETREAT: HO-HUM OR YEE-HAW?

By Judi Craig, Ph.D., MCC

Do you react to the announcement of the yearly firm retreat with less than excitement — kind of like, “Oh no, not another one!” Worse still, do you usually leave the retreat feeling that you’ve just wasted a perfectly good day or two?

Or perhaps you’ve had a different experience: You enjoyed yourself, had some pleasant downtime with your colleagues, ate some good food (probably too much!) — maybe even came away with a few good ideas. But reality hit when you walked into your office the next day to a full in-basket and poof! — all those good ideas were put aside for when you “have some time to do something with them.” Then a few months later, the materials covered with the dust of benign neglect, you searched for something you vaguely remembered, but couldn’t find it. If you did find it, you looked at those great notes you wrote next to the major points but couldn’t read your own writing.

Sound familiar? Unfortunately, many retreats bring about these unim-

pressive results, but the planners certainly didn’t intend it that way. They wanted the retreat to accomplish something that will result in positive change(s) for the firm.

So how do you make your firm retreat what it is meant to be: a great catalyst for an ongoing process toward success?

At The Practice Advisor, we find that a first critical step is to do a “retreat diagnostic.” Rather than just guessing about what would make the retreat meaningful, the diagnostic is a brief survey that the managing partner(s) can quickly fill out. Each section asks key questions about an area of the firm’s operation such as future planning (vision/mission), staffing systems and capacity issues, productivity systems, client selection, client development and marketing, and financial systems. Once the diagnostic is completed, the retreat content can then be built around the critical topic(s).

The diagnostic will also give a good idea of the amount of time to allot for the retreat — for example, should it be

a half day, one day or two? And it can help you decide if you will invite only the attorneys or the entire firm. Or have a half day for each group.

A second important strategy is for the retreat facilitator and the firm’s retreat planner to determine what “pre-work” (if any) is needed. Would it be helpful to have an updated accounts receivable statement broken down by clients? Perhaps a survey of the support staff to “take their pulse”? Maybe a practice diagnostic on the managing partners and/or the associates? A list of referral sources for the past year or two? Having these tools in advance, retreat time is not wasted with comments like “We really need to know who is referring to us,” or “We need to find out why employee morale is so low right now.” Getting necessary data ahead of time means that the content of the retreat can have real substance.

Based on the retreat diagnostic, a meaningful agenda can be planned. Perhaps there will be an educational/training aspect (Time management? How to ask for — and get — referrals?) Maybe what is needed is discussion by the participants on targeted issues (as opposed to a presentation). Perhaps there will be some teambuilding or communication exercises. Maybe all of the above.

And let’s not forget that frequently at least one goal of a retreat is to have some fun — to build congeniality and esprit de corps. This can be accomplished by having some planned recreational activity (a volleyball game, a horseback ride, a scavenger hunt, a ropes course, a talent contest, etc.) that will be appropriate for the setting. Or you might consider giving out some employee awards — humorous or serious.

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Whatever the content of the retreat, it is critical that attendees leave with concrete action plans. The action plans will tell who is to do what by when. Rather than an "action item" that reads "Will increase morale among staff," it will list specific steps for building that morale (Ex: Mary, John, and Sam will meet as a committee in two weeks to come up with an incentive program for our support staff). Rather than "We will revise our policies and procedures manual," the action item will read "Ted and Sally will review our policies and procedures manual and present their revisions at next month's Partner Meeting."

The final critical factor in having a successful firm retreat is to determine a method of accountability. That may mean quarterly meetings to check progress on goals, weekly or monthly coaching calls with groups or individuals to check on progress, another retreat in six months, scheduling appropriate training, hiring a human resources professional, etc. Having clearly defined methods of accountability will ensure the participants' commitment to those action plans.

With a little up-front diagnosis and planning, you can have a working retreat that addresses important issues, builds morale, and leaves the participants with a feeling that — this time — they also accomplished something. Nothing ho-hum about that! ☛



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forms date and witness the forms. From these writings the examiner will be able to study and compare the samples to the signature in question. A list of 101 places to locate documents is available as a "memory jogger" to locate previously executed writing exemplars.

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nation practice, Alamo Area Forensic Labs. Ms. Micklitz may be reached in San Antonio at 830-980-4083 and at www.micklitz.com.

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Equal Protection; Motions to Dismiss

Roger Sullivan v. James Chastain, et al., No. SA-04-CA-0803-XR (Rodriguez, May 26, 2005)

A plaintiff may bring an Equal Protection claim as a "class of one" where he alleges that he has been intentionally treated differently from others similarly situated and there is no rational basis for the difference in treatment. The plaintiff must also allege that the official's acts were motivated by improper considerations such as race, religion, or the desire to prevent the exercise of a constitutional right. For purposes of a motion to dismiss, plaintiff's allegations that River Authority Board kept him from speaking and swore out complaint against him in retaliation for the exercise of his free speech rights are sufficient to allege that the Board's actions were motivated by improper considerations. ☛



Nancy Stein Nowak is a United States Magistrate Judge for the Western District of Texas. Since 1986, Judge Nowak has summarized significant decisions of the local judiciary for the Subpoena and the San Antonio Lawyer.



Nissa M. Dunn is a shareholder with the San Antonio law firm of Crofts and Callaway, P.C.

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