GETTING THE MOST OUT OF PARTNER RETREATS

BY SAM M. ALLRED, CPA

Newspaper columnist Dave Barry once wrote, "If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be 'meetings.'" In truth, "meetings" in and of themselves are not what keep the progress of the human race in check. The real culprits are "bad" meetings—ineffective, time-consuming gatherings of talented and busy people, where much is said but little of lasting value gets done. Annual partner retreats would certainly have to be considered meetings, and unfortunately, they're often not nearly as effective as they might be.

Most CPA firms hold at least one partner retreat each year. As I have visited with firm leaders over the years, many have seemed pleased with their retreats. At some point in the conversation I usually ask, "What criteria do you use to measure the effectiveness of your partner retreats?" While responses to this question are varied, few seem to hit the heart of the matter. The most important measure for evaluating the effectiveness of a partner retreat should be the answer to this question: "What positive change came as a direct result of the retreat?"

The purpose of this article is to offer some insights and suggestions to help you get more out of your partner retreats, and also to warn you about a few pitfalls you will want to avoid along the way. Follow the ten enduring principles identified in the article and your retreats are certain to produce better results.

The key elements of a successful partner retreat are:

I. Identifying the Purpose of the Retreat
II. Selecting a Retreat Leader
III. Preparing for the Retreat
IV. Conducting the Retreat
V. Ensuring Appropriate Follow-up

I. IDENTIFYING THE PURPOSE OF THE RETREAT

The first key to increasing the effectiveness of a partner retreat is to focus on what you want to accomplish. A common mistake when planning a retreat is to take a shotgun approach and try to cover too many things. Another frequent error is to select topics that could just as well be covered in a meeting held at the office. Remember that your goal is to bring about positive change in the firm. Take the time to clearly spell out the desired positive change.

PRINCIPLE #1

Establish a clear purpose for your retreat. A partner retreat will be more effective if you focus on fewer rather than more things, and make meaningful progress in the areas you select.

The retreat should have one or more clearly defined purposes. Think carefully about these purposes, as they become the foundation for planning the entire retreat. To help establish and manage expectations, be sure to openly share the purposes with the participants.

Here are some possible purposes for a partner retreat:

- to write a shared, compelling firm vision that motivates and excites all employees
- to develop a partner commitment statement that describes what partners should expect from one another
- to identify strategic goals that will move the firm closer to its vision

- to develop a written plan to attract and retain the best people
- to establish a written firm governance model
- to create a leadership development program that will prepare the next generation of firm leaders
- to formulate a written plan to retain the best clients
- to develop a written plan to improve partner performance

Each one of these purposes is enough for a one- to one-and-a-half-day retreat, and each has a distinctive goal.

One of the most common mistakes I see is firms attempting to cover three or more purposes in one partner retreat. Although well-intended, this approach makes it very difficult to adequately address any of the topics. A retreat will be more effective if you focus on fewer things but make significant progress in the areas you select. When you try to address too many challenges, it's very easy to spend a lot of time talking about what needs to occur and very little discussing how it's going to get done.

If you feel pressed by multiple purposes for a retreat, I would suggest you identify one or two and focus a retreat on these things. Then hold a second retreat and deal with another one or two topics. Discipline yourself to focus on the specific objectives without wandering to other issues.

II. Selecting a Retreat Leader

Once you have identified the retreat purpose, the next step is to select the retreat leader or facilitator. The retreat leader plays a major role in creating an effective retreat. Carefully consider whether you have the right person within your firm or whether the retreat purposes would be better served by bringing in an outside facilitator.

When choosing a retreat leader, it's not enough to determine whether that individual has the skills to lead your retreat. An additional critical factor is whether this person has the time and commitment to adequately prepare before the retreat and then effectively follow up afterward. Too many retreats fail to produce results because the leader is poorly prepared and unwilling or unable to follow up.

Principle #2

Ensure that the retreat leader is fully involved from the beginning and has the time and commitment to properly prepare and follow up.

An outside facilitator is not a requirement for an effective retreat. There are important issues to address as you consider the pros and cons of bringing in someone from the outside. If you do decide to engage an outside facilitator, that individual should be involved in planning the retreat from the very beginning.

Here are issues to address as you consider the best person to lead your retreat.

- Certain retreat subjects, such as firm vision, firm succession, firm governance, partner commitment, and partner performance, favor an outside facilitator.
- Groups larger than twenty people will likely benefit from an outside facilitator.
- Individuals leading retreats within their own firms must either decide to facilitate the retreat or participate. It is difficult if not impossible to do both.
- An outside facilitator may be the only person who can successfully deal with strong disagreement within the partner group.
- It may very well be that none of the partners wants to lead the retreat or has the time to

properly prepare for or follow up with the retreat.
- A track record of poor retreats casts a dark cloud over future success. An outside facilitator may be able to break the pattern.
- Rooting complacency out of the partner group (and the firm) may require some outside help.
- The outsider may require some time to become educated on firm issues and objectives. Firm leadership and the facilitator must be willing to spend the necessary preparation time to prepare for the meeting. An insider may require less ramp-up time.

If you do decide to look outside the firm, here are some qualities to look for in a good retreat leader:

- the discipline to properly prepare
- previous experience helping partner groups deal with difficult issues
- firm management experience
- strong listening skills
- skill in leading effective discussions
- courage and tactfulness
- ability to cut through difficult issues

PRINCIPLE #3

Although you may expect a facilitator to provide additional guidance and follow-up from a meeting, never abdicate the responsibility for following through on post-retreat assignments to someone outside of the firm.

From my perspective, far too many firms turn their retreats over to outside facilitators, allowing that person to determine the focus, the research, the agenda, the activities, etc. This is a big mistake for many reasons, the most important of which is that firms then tend to abdicate their responsibility for following up on assignments from the retreat. That responsibility needs to remain squarely on the shoulders of firm leadership.

III. Preparing for the Retreat

A. Developing the Retreat Agenda

An effective agenda can have a significant impact on the success of the retreat. All too often agendas are thrown together or changed at the last minute without careful thought or consideration to the potential impact on the outcome of the retreat objectives.

PRINCIPLE #4

Always prepare and follow a detailed agenda for your retreat .

Clearly state the purpose or goal of the retreat at the top of the agenda. A good agenda will identify each item's goal or objective, the individual responsible to lead the discussion or exercise, and the item's beginning and ending times. The agenda should provide adequate time for planning implementation of the goals and tasks necessary to make the required changes. This could be scheduled after each item, at the end of the day, or at the end of the retreat. The key is to schedule the time.

As you prepare the agenda, consider two critical questions:

- What positive changes need to occur as a result of the retreat?
- How will we know if the retreat is a success?

PRINCIPLE #5

Due to past experience, participants will likely have differing expectations for the retreat. Carefully set and manage those expectations and make sure that everyone understands in advance the intended results of the retreat.

B. Setting and Managing Expectations

Because it is so important to properly set and manage expectations, be sure you carefully review the communications you send to participants. Some firms have partners who love retreats. They look forward to the opportunity to get away from the office, roll up their sleeves, and take on one or two big items—"wrestle them to the ground" as one of my partners likes to put it—and then enjoy some recreational activities together.

Other partners dread this annual event. Some think it's a waste of time (as one partner put it, "We spend all this time talking about what we're going to do differently and then we return to the office as if nothing happened"). Others dislike the conflict that sometimes arises in retreats, or they may feel that no one has the courage to really address "the elephants in the room". Another common complaint I hear from partners is, "Why bother to spend the time and money to hold a retreat when we're just going to end up doing whatever the managing partner wanted to do in the first place?"

You need to determine how your partner group perceives the retreat. Do people feel obligated to come or do they really want to be there? What do they believe is the purpose of the retreat? Do they really feel that positive change can result from the retreat?

It's important for everyone to understand that the retreat is not an end in itself—it's simply one step in a continuous effort to improve the firm. Stress to participants that discussions at the retreat are meant to produce concrete results that will make a real difference in the firm. It's not a time to just talk or hang out.

C. Choosing a Location

Choosing the retreat location is a very important step in conducting an effective retreat. Ideally a retreat site should be just that—a retreat from the office. Following are considerations when selecting a retreat location:

- travel distance and accessibility for all participants
- quality of meeting rooms (lighting, chairs, etc.)
- quality of lodging facilities
- availability of breakout rooms
- attentiveness and service of retreat facility employees
- dining experience (quality of food and service)
- availability and quality of recreational activities

PRINCIPLE #6

The right location sets the stage for the quality of work that is accomplished at a retreat and the relationships that are built between the participants.

I have enjoyed most the retreat locations that allow participants to get away from the noise and busy-ness of the city so they can really focus on the critical issues at hand. The right location can go a long way toward making the retreat a great experience for everyone involved.

D. Determining Attendees

You need to decide who will be attending the retreat and if attendance will be mandatory. Consider whether there are others outside the partner group that should be invited. Some firms are moving toward inviting managers to attend a portion of the retreat. From the manager's perspective, it's a big deal to be invited to attend a leaders retreat. If you decide to include employees, partners need to lead by example in their enthusiasm for the meeting and, you must ensure that the portion they attend is especially well planned and provides something of real value to the participants.

PRINCIPLE #7

Carefully consider who should attend the partner retreat and whether attendance will be mandatory. If you choose to invite non-partners to participate, make sure the portion of the retreat they attend is well planned and provides something of value to them.

You also need to decide whether to require attendance. If you have heard little complaining and no partners have had to be physically dragged to previous retreats, then requiring all partners to attend is likely the best course. I am aware of several firms that have made attendance at partner retreats optional. Those who do attend are required to sign a commitment form. I will discuss the items to be included in the commitment later in this article.

E. Gathering Meaningful Information

As you plan the retreat, carefully consider the information required for the partner group to make necessary decisions. Gathering such information in advance is often overlooked simply because the retreat leader doesn't have time to properly prepare. The key to gathering the correct data prior to the retreat lies in identifying the retreat's primary purposes. Every one of the retreat purposes listed earlier would benefit greatly from data gathering in advance of the retreat.

PRINCIPLE #8

Gather the data needed to help partners make decisions at the retreat prior to the meetings.

There are several important reasons for gathering data before the retreat. First, it gives partners the opportunity to consider how they feel about a particular issue. Second, it allows them to consider their thoughts and feelings uninfluenced by others. Third, it gives the retreat leader the opportunity to gauge the group's feelings on a particular issue before the retreat begins. Finally, it allows participants to spend more time during the retreat working on implementation issues.

IV. CONDUCTING THE RETREAT

Get the retreat off to a good start with a well planned opening presentation. This presentation should clearly articulate the purpose for the retreat and identify what you want to accomplish.

I remember a high school track meet I attended some time ago. One of my sons was competing in the 300 meter hurdles. A friend of his, who was also running in this event, hit the first hurdle and crashed. Although he got back up and completed the race, he finished dead last and had some visible bruises to show for his efforts. Practice how you will kick off the retreat so you don't crash and burn on the first hurdle.

It's critical to the success of the retreat that those who are there be present, both physically and mentally. To encourage this, consider adopting a retreat code of conduct or an attendance commitment. Here are some commitments that might be included.

1. Arrive on time to all meetings and events.
2. Be prepared to participate by asking questions and sharing knowledge at appropriate times.
3. Listen respectfully; acknowledge other's views.
4. Avoid sidebar conversations and allow one person to speak at a time.
5. Be crisp, say what is essential, and don't dominate the discussion.
6. Be honest and don't hold back. No disfavor, penalty, or reprisal will occur for being honest.
7. Commit to doing what's best for the firm.
8. Remember that others may see things differently than you do and don't take it personally.
9. Consider conflict as a necessary step along the path of progress.
10. Look for ways to enlarge the pie instead of worrying about how big your piece is.
11. Maintain team integrity and confidentiality.
12. Give the facilitator the power to interrupt, maintain order, and keep the group focused on the stated goals and objectives.
13. Turn off your cell phone and pager and don't allow yourself to be interrupted unless there is an emergency.
14. Choose to have a positive attitude.
15. Identify means to implement the information received into your work environment.
16. Stay for the entire retreat.
17. Follow through on personal assignments given during the retreat.

These are, of course, only examples. You won't want to have seventeen rules for people to try to remember and follow. If you like this list and aren't sure which ones to select, have your partners assist in shortening the list by rating the importance of each item.

Use good consensus-building techniques to move the group toward decisions. Unfortunately, there are a number of bad consensus-building methods used in our profession. One particularly bad approach is for the retreat leader to ask the managing partner how he or she feels about a certain issue, and then continue around the room asking the same question.

Realize that on very sensitive issues, some individuals may fear being honest with the group. If you sense this is happening in your retreat, select a consensus-building exercise that allows all partners to confidentially indicate how they feel about a particular issue.

PRINCIPLE #9

Plan to spend fifty percent of the time in the retreat talking about what needs to be done and the other fifty percent planning how to do it.

Take the time during the retreat to develop a detailed implementation plan. The plan should include the specific tasks that need to be completed and the deadlines that need to be met to ensure the group achieves the retreat's goal or purpose. The importance of budgeting time during the retreat to plan the implementation of ideas and assignments that have come out of the retreat really can't be overemphasized. Throughout the retreat (or near the end), the leader must have adequate time to review decisions and agreements and, with the group's input, assign responsibility and deadlines. The more specific and trackable these assignments, the more likely the tasks will be accomplished after the retreat ends.

V. Ensuring Appropriate Follow-up

This final element is of paramount importance in ensuring the effectiveness of your partner retreat.

The goal of retreat follow-up is to make it clear that actions planned during the retreat are an essential part of the firm's ongoing agenda. There should be no disconnect between the commitment shown during the retreat to a particular issue, decision or agreement, and the commitment shown back in the office after the retreat is over.

Writing about this challenge, Marc Rosenberg once said, "Most unsuccessful retreats follow a similar pattern. Gut issues are addressed, open and frank discussions are held, and a number of ideas are generated from those discussions. Participants feel the retreat is worthwhile. But as soon as everyone gets back to the office, it's business as usual. None of the ideas get enacted."

Avoid falling into this trap by taking time during the retreat not only to develop the detailed implementation plan, but also to discuss the principles of accountability and commitment that are required to accomplish the tasks and assignments identified during the retreat. Every partner must understand that spirited involvement in the implementation plan—not grudging compliance—is the only acceptable course once the lights have been turned off at the retreat site and everyone has returned to the office.

Principle #10

Talk openly about the need for accountability and commitment to the tasks and assignments identified as part of the retreat.

Retreats, time spent in "Quadrant Two" activities, are essential to the health and development of any quality firm. However, if not properly planned and conducted they can result in credibility gaps with firm leadership and frustration with lost time. Adherence to the principles identified in this article and the appropriate attention to the key elements of a successful retreat should ensure the time, effort and financial resources invested in the process bring about lasting results for the firm.