

Partner retreats – six ideas to make them a success...

In the New Year many firms will start planning their 2015 partner retreats and some will already have the date in everyone's diary. A partner retreat can play a very useful role in building the partner team and developing strategy, and can make a real difference. This short paper sets out six ideas based on my experience facilitating retreats for clients:

1. Get the date in everyone's diary as soon as possible

It may sound obvious, but you need everyone there, so make sure it is in their diaries as soon as possible, particularly if the retreat is to be at a weekend. Earlier this year at one of my clients, the partners were given two months notice but three already had prior commitments which had to be re-arranged, so not a great start to the arrangements.

2. Go off site

It is always better to get out of the office as this helps everyone relax. Tomorrow I am running a retreat at a country house hotel, which should be ideal. As well as the main meeting room book two or three breakout rooms as it will be useful to spend part of the time in smaller groups. This ensures everyone has an opportunity to contribute and have their say.

3. Make it residential

If possible stay overnight and have dinner together. Don't bring spouses, as it is important the partner team spends time together. There will be other opportunities during the year when you can meet each other's families. Time in the bar at 3.00am with colleagues from different offices or departments is as valuable as the time in the formal sessions, if not more so.

4. Involve other people

It is often better to include managers and senior associates, at least for part of the retreat. I facilitated two retreats for one client a few years ago – the first was just the partners and at the second we invited a number of senior managers and associates. The dynamic was completely different on the second occasion and the retreat far more successful.

5. Use an external facilitator

Resist asking the senior or managing partner to chair the retreat as it is important they are able to contribute freely and not worry about running the retreat. It is better to use an external facilitator as they will manage the discussions, draw out key points and challenge your thinking.

6. Invest time in planning

It is important to invest time beforehand planning and preparing the retreat. If you are using an external facilitator don't just ask them to turn up on the day, get them to meet the people who will be coming in advance and learn about your firm. They will then understand the issues and be better able to contribute.

"Andrew has a depth of knowledge about the pressures facing the owners of solicitors practices today and a wide experience of how different firms are tackling these issues. However his real strength is the clarity he brings to the planning and decision making process which allied with his energy and enthusiasm helped generate a real sense of purpose and unity amongst our partners."