



Rev the Revenue: The Marketing Focused Retreat

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By David H. Freeman

Tear the roof off most any major law firm and what do you see? Massive amounts of unfocused marketing energy. From this 30,000 foot, leaders-eye view, responsible stewards of their firms should ask, "how do we harness this energy, how do we concentrate it to achieve our overall goals (assuming we have any), and how do we converge the activities of our individual lawyers, the practice groups, disparate offices, and departments in order to unleash the potential that we know exists?"

It is the job of leadership to define and channel this whirlwind of human activity. Looking into a leader's managerial toolbox, there is one piece of equipment that is woefully underutilized for providing the necessary navigational support. This instrument is the retreat. A well-designed retreat is the eye of the storm, a short window of calm that allows for reflection, decision-making and planning. Once the swirling winds of practicing law reemerge, the results from a retreat can provide the necessary guidance that most firms lack.

Creating a high impact retreat requires focus. At the end of the day, since it all comes down to profits-per-partner, retaining and acquiring clients remains a top priority for most firms. Reliance on marketing departments to solely bear this responsibility is short-sighted and naive; while they can help develop strategy and provide significant support, they are not the foot soldiers who must go and get the clients.

There's tens of millions of dollars in new business waiting out there. The marketing focused retreat can provide the strategy, direction and tools to get the job done. The only remaining question is: How?

First, let's look at the factors that give retreats a bad name.

Inadequate preparation. Work that is done in advance of the retreat can have a significant impact on its eventual success. Managing expectations, providing pertinent research and developing well-conceived agendas can improve the outcomes at the end of the retreat.

Poor design that does not support firm-wide goals. An exceptional design can get people to do exceptional things. Retreat organizers should link everything to the firm's strategy, and if you don't have one, use the retreat to build it.

Insufficient post-retreat follow through. Keep your eye on the ball. True success should be measured by what is accomplished long after the retreat is over.

Too many talking heads. Many leaders use retreats to dump information on their captive audiences. Save speeches for topics that are strategically necessary.

Overly negative messages. You may have had your worst year ever, but your partners already know that. What they need is a plan for climbing out of the hole and back to prosperity.

Telling rather than engaging. Even if you have devised a brilliant plan, you need your partner's buy-in to make it fly. The best way is to allow them to build parts of it. "The goal is not to have the participants be told — but to discover — what they can do to achieve their goals", says Sam Frederick, CEO of SAFLAW Management and former Director of Strategic Planning and Marketing at Saul Ewing LLP.

Leaders must recognize that the retreat itself is only one piece of an overall process of getting exceptional results. A high impact, marketing focused retreat is a three-part harmony of preparation, the retreat itself, and the follow up that occurs because of it. The following will discuss important elements of each of these three key areas.

Preparing For A Marketing Focused Retreat

Every lawyer knows that preparation is vital to success. The same holds true for a firm's retreat. The following are some steps you can take that will improve your chances for delivering an exceptional event:

Conduct an internal survey. Reality is the backbone of any effective planning process. Survey your partners in advance to get a real-time understanding of their opportunities, their obstacles and their suggestions. Better yet, also include associates, management, staff, and clients in order to get a more comprehensive picture.

Provide market and client research. Many of the group discussions will require specific data in order to make sound decisions. Think through these sessions in advance and anticipate the information that will be needed.

Senior leadership support. Your leaders must stand firmly behind the retreat. Get them involved early in the process so you can have their buy-in and ongoing support.

Assemble the right team. Add creative and strategic thinkers to the retreat committee, and definitely include your marketing and business development professionals. Given that retreats often represent the best opportunity to impact business development all year, I consider it "management malpractice" not to include these professionals in the process.

Create an outstanding agenda. A great retreat must have a great design. Get crystal clear on your objectives and outcomes, and build a process that will get you the best results.

Externally focused. In the marketing focused retreat, it's all about the clients, so the bulk of the design should be focused on how to better obtain and serve them. Internal planning should be addressed only to the extent it supports these goals.

Creativity and fun. We are in a profession made up of brilliant people who generally work way too hard. Build in some fun and allow the right brain to take over for a while. Giving room for some new neural connections may result in ideas that can lift your firm to new heights.

Keep it interesting. Fully engage their minds and hearts. Make your programming relevant, inspiring, and upbeat.

Conducting The Marketing Focused Retreat

A marketing focused retreat can be a major catalyst that sets the compass in the right direction. An exceptional process can get your lawyers interacting with each other, engaging in important discussions and making crucial decisions. The retreat can get them focused, energized, and motivated to follow through on their commitments. The following are some factors to consider in the design and delivery of your program:

"Where's my motivation?" Simply put, most partners don't respond well to being told what to do. They are, however, motivated to act on what they believe needs to be done. For this reason, it is very important to use a collaborative process during the retreat so that they are motivated to act on the ideas they created. Help your lawyers discover for themselves how they can work together to build a better future.

Internal networking. Studies have shown that improving an organization's culture has a positive impact on its revenues. Do what you can to enhance relationships between your partners. This is especially important where firms have recently merged, acquired new offices, brought on laterals, or have multiple locations. One Chief Marketing Officer estimates his firm had 10,000 to 14,000 client contacts, and his goal is to extend those relationships to other lawyers in the firm.

Focus on your best marketing opportunities. There are millions of dollars in new business that is merely one conversation away from being yours. Get your departments and practice groups engaged in intra- and inter-group dialogue that identifies the opportunities. One firm with New York and California offices got their partners together for a 2-day retreat, and by going through a process of engaging in cross practice group conversations, found tens of millions of dollars in potential new business.

Bring in the pros. If you think you're going to engage in some contentious discussions (such as compensation), consider using a professional facilitator. A poorly handled issue not only fails to get resolved, but may also severely damage relationships between your lawyers.

Learn from your clients. Marketing focused lawyers constantly say they should get closer to their clients. "If you want clients to be your partners, invite them to become your partners," says

Al Romanoski, litigation marketing strategist, former Marketing Director at Sidley Austin Brown & Wood. He reported excellent success when the firm had clients join them for the entire retreat. They participated on panels, socialized with the partners, and for a few days, truly became part of the firm. Warning: Know your firm's culture. If your partners use retreats to let loose, leave the clients home.

Build the team. Retreats can be a forum where you roll up your sleeves and get some work done. "A great session would be where the group feels they have moved the chains as to where they are going as a business unit, where everyone participates, makes new connections, feels good about themselves and the group, and has a sense of belonging," says Mark Beese, Marketing Director at Holland & Hart LLP. Smaller groups like client teams, industry groups and practice groups are the right size to engage in specific strategic and tactical planning.

Action steps and accountability. The marketing focused retreat, in itself, is just a starting point. It is a spark that ignites a chain of events that continues long after the retreat is over. During the retreat, you should develop clear action steps, establish specific accountability, build timelines and discuss the process for following up in order to set the stage for sustained, ongoing activity.

Post-Retreat Follow Up

This is where the real heavy lifting begins. Once the excitement of the retreat dies down and your lawyers are sucked back into the maelstrom of billable activity, getting them to focus on the commitments they made during the retreat can be very challenging. Building in supportive processes will help assure that the outcomes envisioned during the retreat actually come to fruition.

Tracking implementation. The reality in a law firm is that if it's not billable, it is not a priority and therefore falls under the radar screen. Keeping business development commitments alive takes work, and it's not fair to entirely blame your lawyers when they can't keep it going. As a leader, your role is to recognize this human frailty and develop systems to help them succeed. An effective tracking and reminder system will:

- Keep commitments top-of-mind;
- Let lawyers know how important these activities are; and
- Communicate that Big Brother is watching

Regular update meetings. The echo of commitment grows fainter with every passing day. Regularly scheduled business development meetings provide the boost that keeps the ball moving toward the goal. Hold people's feet to the fire. Being held accountable for agreed upon commitments in front of peers is the essence of the "management by embarrassment" theory of leadership that works so well in our law firms.

Business development training and coaching. If you send your lawyers out big game hunting, you'd better arm them. In almost every other industry, leaders recognize that selling is the lifeblood of their organizations, and therefore provide significantly more training than we do. It should be the responsibility of our leaders to give the support necessary to make lawyers more effective in their marketing.

Celebrate successes. All too often our victories are private, fleeting affairs. If properly communicated, marketing successes can be powerful learning experiences, morale lifters, and momentum builders. As appropriate, marketers should let the firm know when the firm achieves goals that were set in the retreat.

Link a portion of compensation to marketing. Like moths to a flame, most people follow the path to the money. Show your lawyers that the road to increased compensation includes engaging in marketing activities, and they will travel it. Be certain to be fair; not everyone contributes in the same way. Reward activities that are appropriate to the level of seniority and talents that each lawyer brings to the firm.

Measuring Success

Many retreats have a hard time justifying their cost. With expenditures in the five, six and seven figure range, more leaders are demanding a measurable return on this activity. The marketing focused retreat can turn what has been an expense into a sound investment by providing results straight to the bottom line, while still accomplishing some of the "softer" goals of increasing collegiality and interaction between lawyers that barely know each other.

By providing the proper infrastructure and conditions, leaders can harness the enormous talent and motivation that lives within each of their lawyers. Reconfiguring an ordinary retreat into a marketing focused event can have a significant impact on the direction and fortunes of your firm.

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