Turning Retreats Into Revenue

David H. Freeman, JD
Founder, Law Firm CultureShift®; CEO, David Freeman Consulting Group Inc.

Fantasy Retreat

Catalyst to spark major changes
Mixes future planning with achieving current results
Maximizes group synergies
Enhances collaboration
Relationships improved and deepened
Achieves consensus, buy-in and commitment
Lawyers willing to run through walls
Tackles tough issues
Generates accountability and rapid implementation
Belief it was a valuable use of time
And, millions of dollars of new business identified
Business Development Culture Killers

- The silo mentality
- Inertia, bad habits, time management
- Lack of trust
- Lack of knowledge and poor communication
- Misaligned compensation systems
- Fear of failure and misperceptions
- Perfect as the enemy of good
- Lack of skills
- Overemphasis on billable hours
- Weak leadership, accountability, tracking, measures

Retreat Killers

- Misaligned with firm goals
- Inadequate preparation
- Info dumping
- Too many talking heads
- Endless financial presentations
- All work and little play
- Discuss topics that are not of interest to the broader audience
- Overly negative
- Weak post-retreat follow through
**Major Retreat Goals**

Focus on clients – knowledge, service, wow
Initiate change/rewrite thinking
Build, reinforce or refine plans and key messages
Education (new, firm best practices)
Align & energize
Identify obstacles to growth and performance
Deepen shared mission and vision
Create a stronger connection to the firm
Create buy-in (groups and individual)
Collaboration, collegiality, communication
Wide-spread participation/inclusion
Set the stage for implementation
Create a sense of urgency
Gain permission to follow-up
Enjoyable

**Preparation**

Senior leadership support
Inclusive – lawyers, staff
Reverse engineer
• Focus on the client
• Clarify desired outcomes
• “What must happen at the retreat to give you the best chance of achieving our goals?”
Don’t discuss compensation
Research, surveys, client feedback, interviews
Plan for and address potential obstacles to success
Driving Revenue-Producing Behavior

- Pre-retreat survey
- Retreat theme
- Address skepticism
- Create a clear vision
- Encourage buy-in and engagement
- Facilitation
- Strategically mixed groups
- Icebreakers and teambuilding activities
- Action steps, commitments, timelines
- Lawyer journals

Revenue-Focused Programming

Speakers (inspire vs. action)
Topics:
• Business development
• Cross-selling
• Client service/panels
• Culture/teamwork
• Leadership
• Visioning/Good to Great
• Practices of the future
• Hunting as a pack
• Personal development
• State of the firm (minimize)

Facilitators
Practice & Industry Groups, Client Teams
Stump the mgmt. committee
Small group peer coaching sessions
Speed dating
Videos and presentations
Practice group trade shows
Reciprocity ring
Parking lot
Suggestions wall
### Total Marketing Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
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<td>RFP’s/Presentations/Proposals</td>
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<td>Writing – third party publications</td>
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<td>Organizations - leadership</td>
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<td>Cross-selling: giving</td>
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<td>Cross-selling: receiving</td>
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<td>Client feedback meetings</td>
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<td>Other client service initiatives</td>
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<td>Desired prospective clients</td>
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<td>Potential referral sources/Alumni</td>
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### “Whenever we talk to each other, we get business”

- Lawyer baseball cards
- Little known facts
- PR Agent
- Favorite areas of practice
- Jerseys of favorite sports teams
- Nametag: “Ask me about ____”
- Inspiring songs/movies/books
- Best piece of advice
- “If I wasn’t a lawyer, I’d be …”
- Facemats/table quizzes
- Retreat bingo
- Social time/significant others
- Talent show/skits/movies
- Game shows
**Lawyer-to-Lawyer Interactions**

- Pre-retreat training
- Target specific lawyers (breaks, meals, social)
- Memorable elevator speech
- Success stories
- Hot issues
- “Gifts”
  - Free services, clients, joint marketing
- Follow-up

**End of Retreat**

- “How do we guarantee we will act on the approaches we have developed here today?”
  - Who, does what, by when
  - Volunteers
- Gain permission to be nagged
- Translate high level strategy to actionable steps
- Commitment speech by senior leadership
- “What role can I take/what can I personally contribute to make this retreat a success?”
- “What is one thing you will take from our work today and institute?”
- “What can you do to remind yourself to do these things?”
- “How should we measure our success from this retreat?”
Leadership responsibilities

Senior sponsor

Post-retreat action teams with accountability

Quick wins

Post-retreat survey

Post-retreat implementation committee (Watchers)

Project management/tracking system

Designated nagger/ongoing reminders

Action steps, measures, timelines, transparency

Internal PR/ongoing communication

Ongoing training, refreshers, coaching

Gamification

Post-Retreat Follow Up

• Start with small pilots
• Coalition of the willing/early adopters
• Collect success stories and communicate
• Roll out to the middle 60%
• Internal PR - group meetings, internal publications, one-on-one

Gamification
Gamification

- Measure assists and scores
- Client service initiatives
- Group vs. group or individual
- Meet-o-meter
- Lunch time bingo
- Take a lateral to lunch
- Social media hits; writing blog posts; publishing alerts
- Alumni relations
- Ongoing communications to top targets and lower priority
- Cross-selling
  - Introductions – meetings – work
  - Deeper dive …

Cross-Serving: Giving

Present Opportunities to Firm Lawyer
1. Prepare for the Receiving Lawyer Meeting
2. Conduct Meeting with the Receiving Lawyer

Solicit Client Feedback
3. Conduct Research
4. Prepare Questions
5. Create the Pre-Feedback Meeting Checklist
6. Conduct Feedback Meeting
7. Implement Feedback Action Plan

Approach the Client
8. Prepare for the Meeting
9. Schedule the Client Meeting
10. Conduct and Meeting and Next Steps

Cross-Serving: Receiving

Approach Other Firm Lawyer
1. Conduct Research
2. Build Internal Relationships
3. Build the Business Case
4. Conduct the Relationship Lawyer Meeting
5. Follow-up on the Relationship Lawyer Meeting

Approach the Client
6. Prepare for the Meeting
7. Schedule the Client Meeting
8. Conduct and Meeting and Next Steps
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