



Planning a Self Run Retreat

1. Overview

A firm retreat or advancement is an opportunity for people within your firm to share information, ask questions, and plan for the future of the firm.

2. Preparation

In preparation for the firm advancement goals need to be outlined and agreed and who should attend needs to be addressed.

3. Philosophy

- What part do partners play
- Should manager and staff be invited to part of the meeting

4. Input for the meeting goals

- Accomplishments
- Action for follow through
- Clarify business goals
- Outline succession plans
- Discuss the attributes of the managing partner and partners

5. Questionnaire

- Give a survey to partners, managers and staff
- Collect the survey responses prior to the meeting
- Have all of the data prepared for the meeting

6. Sample questions

- Consistency
- Firm unity
- Business goals clear and known
- Do we have the right firm culture
- Obstacles



7. Planning

- Establish discussion groups
- Reason for the plan

8. Questionnaire results

- Write a detailed report
- Break out parts of the results to the small group for discussion during the meeting
- Outline recommendations

9. Plan to succeed

- Identify the future needs of the firm
- Organic or mechanistic growth
- Develop a strategy

10. Simplified strategic plan

- Goals
- Strategic Plan
- Participation
- Results

11. Write action and date

- Partner responsibilities
- Benefits to the firm

12. Firm Growth and Advancement

- Decisive action
- Strategic statement
- Tactical action

13. Summary