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Make This Year's Partner Retreat More Productive

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BY STEVE ERICKSON



During this time of rapid change and uncertainty, partner retreats have never been more important.

Firms must be able to make strategic decisions and then execute quickly and efficiently, or risk losing out to their competition. Unfortunately this ideal situation is rare as many partners spend a significant amount of their time at retreats talking about the past and issues that cannot be changed. In fact these

conversations often lead to arguments and differences of opinion about responsibility and who is at fault.

These retreats are not only nonproductive, but also very frustrating, and can be perceived as a waste of time to most attendees as individual partners drift off, check email and disengage from the discussion. Some firms have given up having retreats altogether to avoid having difficult conversations and dealing with the conflicts that result. Partners must meet often (I recommend an annual and mid-year retreat schedule) to refine and implement their plans and make further decisions. The business world is moving so fast that refinements to strategy and tactics must be made often to keep plans on track.

I can't begin to tell you how many times I have had partners tell me that they generate great ideas at their retreats but fail to execute on those ideas. This typically happens when everyone is responsible to make the plan happen, yet no one individual is responsible.

Partners have good intentions; however, they have their own agendas and priorities, and the firm plans can get set aside. Months and then years go by, and eventually partners lose faith in the process and perceive retreats to be a waste of time and money. Partners need to move past their negative histories and experiences, and start holding effective retreats if they want to thrive in the future.

Here are a few ideas to make your retreats more strategic and productive.

- **Focus on the future.** We can't change the past but we can react and manage the present which leads to future success. If partners have unresolved issues hold a separate meeting in advance of the retreat to get resolution. It is very difficult for partners to be genuinely positive, focused and engaged in discussions concerning the future of the firm when old unresolved issues are still on their mind. Make sure everyone understands that the retreat is about the future of the firm.

- **Prepare in advance.** One wise managing partner told me to never call for a vote of the partners if you don't know how the partners will vote. That is very important, sage advice to keep partners from getting boxed in a corner and becoming overly defensive during a retreat. Interview or poll your partners so you know their positions and feelings about matters to be discussed and acted upon in advance of the retreat. If you find there are significant differences of opinion among the partners, start the reconciliation process well in advance of the meeting. Sometimes a disagreeable or obstinate partner will have to be told how the other partners feel about certain matters, what the group decision looks like it will be and that you would like to have their acceptance of the majority decision. A retreat is no place for surprises!

- **Have an agenda.** A carefully designed agenda will go a long way toward making your retreat a success. I usually recommend that firms use a two-day meeting format as it is very difficult for people to get from a problem to the right solution in a very short period of time. Discussing issues and alternatives on the first day of the retreat and making decisions on the second day of the retreat works best. I recently read in a medical journal that researchers have found that most of us have better problem-solving abilities and make better decisions after a good night's sleep. I believe it, as I have commonly observed this fact over the past 10 years of facilitating retreats. The "sleep on it" advice that our mothers gave us really works! The agenda needs to be distributed well in advance of the meeting and must include the objectives, the process as well as the decisions to be made at the retreat. You don't want partners at the

retreat telling the group that they need to “think about it” before they can make a decision.

- **Adopt and enforce ground rules.** This is especially important if there is a history of going off the topic being discussed, or behavior at previous partner meetings and retreats has been disruptive or disrespectful. The facilitator of the retreat should prepare a list of ground rules that are important and then ask the group for any others they would like to add to the list. Once the list is developed, have it adopted by the group and make sure the facilitator of the meeting is given the authority to enforce the ground rules. Here are a few examples:

- o I will give the sessions my full attention;
- o I will listen to others;
- o Only one speaker at a time;
- o I will stay on topic’
- o No verbal attacks;
- o Focus on solutions (the future) rather than problems (the past);
- o Keep a positive attitude;
- o Focus on the long-term health and benefit of the firm; and,
- o Support for the decisions made by a majority of the partners.

- **Remember your conversations define your relationships.** There is a very clear pattern between strained partner relations and how the partners communicate with one another. If conversations are chronically heated and emotional, I can almost guarantee their relationship is strained. When this happens repeatedly, partners start to meet as little as possible because they don’t want the conflict and meeting with each other just causes more disagreement and conflict. Don’t let your

partners get caught in this trap. If partners want to have productive relationships, remember to keep the conversations productive and professional as it promotes respect, which leads to more effective collaboration and better decisions.

- **When to use a facilitator.** If past retreats have not been as productive as you would like, or you would like to cover more ground in your retreat, you might want to consider hiring a facilitator. You want someone who can hold the partners accountable and keep the agenda moving forward. This also allows every partner to speak their mind without appearing to control the agenda and discussions. It’s often tough for partners to serve as facilitators and still appear independent and objective when they have some skin in the game.

- **Decisions and follow-up.** At the end of the retreat, there must be an action plan designed to implement the decisions made during the meeting. The action plan must be approved by the partners and include the person who is responsible and the date for completion. I encourage partners to make the action plan a standing agenda item at monthly partner meetings to monitor progress and maintain accountability. The level of trust among the partners will improve as plans are successfully implemented.

Once partners develop a pattern of positive and productive retreats they will become more engaged and willing to participate in the development and implementation of the strategy for the firm going forward. When all of your partners are on the same page let the competition beware!

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