



8 REASONS FIRM RETREATS DON'T WORK

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With more and more professional services firms coming back into the office, this has become an unprecedented time of strategic planning for many practices. And one of the main ways many like to do this is through the off-site practice retreat.

But, here's the thing I've noticed... a lot of practice retreats are, well, pointless. No decent strategies or tactics are developed, no proper conversations or illuminating discussions are held and no one is any the wiser about where you're heading.

Instead, a lot of time and money is spent with very little to show for it.

With that in mind, I thought I'd share with you the eight biggest problems I see and what your practice group can do about them.

1. EVERYONE HATES EACH OTHER

Often people in the same practice group see each other as rivals, not friends or even collaborators. They don't like spending time in the office with each other - in fact, they'd rather stick pins in their eyes. Now, you're asking them to go away spend a whole long weekend at a place they can't get away from each other. This isn't a reward; it's an enforced prison.

The very nature of professional services firms means that leadership (and followship) are fragile and contested and the fact is, no amount of forced team bonding through cooking classes or ropes courses is going to cure this. It's a problem with the culture in your place and it needs a deeper fix than a group retreat.

Show some leadership and spend your time and money creating an environment for others to work in before you go away. Or as Stokes and Dopson (2020) say "*shift the mindset from ego to eco.*"

2. THE BIG KAHUNAS DON'T TURN UP

Who hasn't been to one of those retreats where the senior partners didn't come? Or where the bosses came later than everyone else and left before everyone else too? Nothing undermines a retreat more than a lack of engagement from those at the top. No one is going to take something seriously if their boss doesn't.

So, if you want to make the most of your retreat, be part of it. And be part of it right from the start. Don't expect your juniors to do all the work, set the agenda and plan the thing. That's

your job. This is supposed to be about the strategic direction of your business, after all. Which brings me to my next point...

3. THERE'S NO COHERENT AGENDA

This is another common issue and one that goes right to the heart of what the retreat should all be about. A good retreat is where you talk about what's happened, establish the plan for what happens next and get everyone on board and working towards your goals. You simply can't do that without proper planning. But that doesn't always happen.

All too often fee earners are given a survey about the firm's strategy. But the time and effort they spend putting into them gets ignored. The surveys get binned; the threads aren't followed; the loops aren't closed; and a whole different direction takes shape.

I can't tell you how often I've been to retreats where the program takes a little something from here, a little something from there, and then something from somewhere else for good measure. There's no big picture strategy here and, for that reason, not much gets achieved.

Overcoming this again means having your senior people involved at the start and matching your retreat agenda to your strategic objectives.

4. NO ONE READS BEFOREHAND

How often have you turned up at your first retreat-based seminar and realised informed discussion is impossible because so few people have bothered to do much of their pre-retreat reading? And how often does the person who's read the least and knows the least about the topic decide their voice should be heard above all others? It really is just like being back at university all over again.

To avoid this, you need to give people time to read and digest the material that will form the basis of your seminars. And that won't happen if...

5. YOU DON'T CUT ANYONE SLACK

In professional services time is money. When you take people away from their work for the group retreat you're taking them away from their ability to meet their other targets. No wonder they're not very enthusiastic about turning up, let alone devoting time to conscientiously preparing for each seminar you're making them attend.

Give them a break. Let them devote a few hours to reading what they need to read. Don't let them turn up late or leave the retreat early to get back to work, and only let them take work with them if they really need to.

I know that's easier said than done but surely a retreat that serves its purpose in the long-term is worth losing a few billed hours for in the short-term?

6. THE WRONG PEOPLE GET INVITED

The retreat should be about your team, not anyone else. I know there's a trend these days towards inviting a stack of clients to come and tell you how they want to be treated. And I agree. There's a time and a place for that kind of thing. It's just that's it's not now. Besides, chances are your valued clients would rather be at home with their families or getting their own work done rather than hanging out with you. (Just saying...)

The question of whether or not to invite the families of your team is a more complex one. I think there's a strong argument for spouses or partners to be invited along. It's up to them if they want to come and, quite possibly, a lot won't because they couldn't think of anything worse (again, just saying...). But I also think there's a case for just the team being there, especially for the first half.

7. THE ELEPHANT(S) IN THE ROOM GETS IGNORED

A retreat is only ever going to work if it's based on reality, not fantasy.

Often the starting point for a retreat is that "everything's great, the practice is doing well and we all get along just fine". If you've had a great year, that's fine, acknowledge it. But if you've had a bad one, don't pretend otherwise. Everyone will see through it and anything you resolve will be ignored.

Oh, and while we're on it, please don't waste your time drawing up some kind of unrealistic mission statement on the spot. No one will take it seriously.

8. PEOPLE BEHAVE BADLY

This final reason retreats fail is one of the most common and it's also one of the most deadly. It's okay to let your hair down and have fun. But it never ends well when letting your hair down combines with big personalities, an atmosphere of competition, unresolved tension and too much alcohol.

I always find inviting the families along can help here (see 6 above). I also think it pays to set at least some ground rules around people mucking up, as well as people leaving early or letting their tensions spill over.

AND FINALLY...

Done well, a group retreat can be a wonderful thing; done badly it can be an expensive waste of time. If you'd like help to set the agenda for your next retreat so that it achieves everything it can, get in touch.

FURTHER READING

Barolsky, J (2015) *[Advancing The Retreat](#)*

Barolsky, J (2014) *[21 Workshop Facilitation Tips and Secrets](#)*

Empson, L & Alvehus, J (2020) [*Collective Leadership Dynamics Among Professional Peers: Co-Constructing an Unstable Equilibrium*](#). Organisation Studies 41(9): 1234-1256
<http://dx.doi.org/10.1177/0170840619844291>

Empson, L (2019) [*How To Lead Your Fellow Rainmakers*](#) Harvard Business Review March-April issue.

Gardener, Heidi [*Smart Collaboration Accelerator*](#)

Stokes, J & Dopson, S (2020) [*From Ego to Eco: Leadership in the Fourth Industrial Revolution*](#) (Research report) University of Oxford: Said Business School.

Lees, R.J; DeLong, T; & Gabarro, J (2007) [*When Professionals Have To Lead*](#) Harvard Business Review Press

Itay Talgam (2009) [*Lead like the Great Conductors*](#) TedEx (video - 23 mins) Hint: you want more Carlos Kleiber less Riccardo Muti in professional services firm retreats.

Valdes-Dapena, C (2018) [*Stopping Teamwork Happy Talk*](#) (Podcast - 5 mins)

WANT MORE?

If you'd like help with you next retreat email [Sue-Ella](#) or [get in touch](#).



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