



How to Facilitate a Partner / Leadership Retreat



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I spoke to the Geneva Group in Chicago at the Witt Hotel on Friday on "How to Facilitate a Partner and/or Leadership Retreat." The conference had over 100 delegates attending from all over the world. They were for the most part Managing and Leading Partners from both CPA and Law Firms that belong to Geneva Group International (GGI)

Some takeaways from my keynote included:

1. For a retreat to be really effective, a lot of the work should be done before the retreat meeting. For example, you can't expect certain partners to buy into change when they hear about the change for the first time at the retreat. There needs to be effective "pre-selling" and discussion with that partner so they can come to the retreat with their thoughts and strategies already in mind.
2. Too many retreats break down after the meeting due to a failure to implement. The most important takeaways from a great retreat are the minutes and To Do lists. These items need to be incorporated into monthly partner and management committee meetings so the changes and ideas agreed to at the retreat actually get implemented. This sounds basic but you would be surprised how many great ideas get agreed to then never implemented.
3. There is no perfect length of days for a retreat. Sometimes "less is more" and it's really a function of the topics and how much the group can "bite off". It may be the group should have two one-day retreats instead of one two-day retreat.
4. There also should be a lot of thought put into who should attend the retreat. If it's about strategic planning I recommend expanding the retreat to include the entire management committee and senior

managers/associates. Alternatively, if there are going to be some controversial and possibly heated discussions on ownership or compensation issues it's best to block off time (typically at the beginning of the retreat) for a partners-only session.

5. Always have the retreat participants complete a pre-retreat survey whereby the facilitator takes all of the feedback and summarizes it on an anonymous basis for use and discussion at the retreat. It's so beneficial for partners to see when their thoughts are way out in "right-field" and not representative of the majority of the partners. It can serve as a catalyst to advancing change. A good facilitator sometimes can be the "voice" for a partner or two when they may have strong feelings on a topic but are worried about negative feedback from a more significant or domineering partner, or group. The beauty of a great facilitator is they can ask the "stupid" or controversial questions.

As you are heading into retreat and strategic planning season, keep these points in minds. If you need help, email me at akoltin@koltin.com

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