

Meeting Goals

By David H. Maister

Done well, retreats and other partner meetings can be powerful tools to influence the success of a professional practice. Certainly, given the cost and time involved, they need to have a noticeable impact if they are to be justified. Alas, this is not always so.

One of the problems is that while management committees spend a great deal of time discussing *agendas* for the meeting, they rarely are precise about the meeting's *goals*. In too many cases, firms have not articulated what they want to have happen as a result of the retreat.

Firms should not even consider the agenda until they can give a clear and unequivocal answer to the questions, "What changes do we want to occur as a result of the meeting?" and "How will we know if it is a success or not?"

It is remarkable how often ready answers to these questions are not forthcoming. Firms know they want to have a meeting—they're just not sure why.

Some Choices

Some of the most important choices that must be resolved are as follows: First, do we want to have a meeting that is *broad* or *focused* in the choice of topics? Do we want to cover many topics lightly or a few in depth? Either is doable, but with obvious trade-offs.

Second, having chosen topics, do we want to discuss what *you, the individual*, can and should be doing or what *we, the firm*, are going to do? (For example,

discussion of marketing could either be sharing what each person has learned about what works for them personally or it could be a discussion of new firm policies and approaches in this area.)

Third, the firm must decide whether the goal of the meeting is to *generate ideas* or *build consensus*. One definition of a successful meeting is that many ideas surfaced and each person got something to take away, but each person may also have benefited from different ideas.

Alternatively, the real goal of the meeting may be set at achieving a greater degree of consistency of opinion or support for specific ideas. As before, either is an acceptable definition of success for the meeting and either is achievable. But you have to know which one you are aiming for.

A fourth choice is what benefit you want to provide to the participants: *understanding and insight* or *practical suggestions*. One way to serve an individual on a given topic is to help them look at an issue in a new way and have them walk away saying, "I've never thought about it like that before. Maybe I need to do some things differently—let me think about it!"

Alternatively, understanding may be an insufficient goal (or perhaps everyone already understands the issue), and the real measure of success is to help people not with the "why" and "what" of new ideas but with the specifics of "how." Either can be done but each one uses

meeting time very differently, depending on the objective.

Firms might also consider whether they wish the meeting to be the *beginning* or the *end* of a process. If the beginning, how are the topics to be introduced? What process will be followed after the meeting to further develop the exploration?

If the goal is for the meeting to bring issues to closure, how will the determination be made that such closure has been reached?

The Importance of Discussion

Part of the difficulty is that firms try to accomplish too much. Many firms construct an agenda covering numerous topics, with many different speakers organized according to a disciplined, military-like schedule. This approach has the virtue of covering a wide range of subjects but without the opportunity for much discussion or closure. It is not clear what such meetings *accomplish*.

They force the majority of partners to sit on their hands and listen to a long sequence of presentations—hardly a device for bringing about any change. A retreat, in my view, is a time for partner *discussion*, not for (impatient) listening.

Too many partner meetings are filled with “information transfer”—a series of presenters updating the assembled multitude on the latest facts and figures or the status of last year’s initiatives. While there usually *is* a need for information transfer, a series of talking heads (often with lowered lights and 35 mm slides) is guaranteed to waste time and put everyone to sleep.

Instead, firms should find some way to get the information transfer over with quickly and early. Put the materials in the conference package (or better yet, circulate them in advance) and proceed straight to the discussion period for the topic.

A better approach is to focus the meeting around the goal of building consensus for action on specific ideas or initiatives. Note that there is (or should be) a clear distinction between building consensus and decision making. Partner meetings are perfect vehicles for exploring issues (in depth), but *en masse* decision making is rarely wise.

The best device for ensuring that this distinction is observed is to make clear precisely who will have responsibility for “running with the ball” once the retreat is over. Too many partner meetings have terrific discussions, with many an emerging consensus on a number of good ideas, and then—nothing happens. Everyone goes back to their practice and nothing ever changes.

One Success Model

Here’s one way it can work. The management committee of the firm should decide on what issues it would like to hear the views of the partners. (Hopefully there is *something* that fits this category!) A separate “retreat committee” might serve the role of proposing topics that management *should* listen to the partners on, but they’d better check that management is truly willing to listen. I’ve attended too many retreats where a retreat committee chose topics that the management committee had no intention of doing anything about, and everyone ended up frustrated.

Management's job at the meeting is to shut up and listen. It is not very productive for management to spend much time at a partner meeting on exhortation, inspiration and sharing its views of the firm's strengths and weaknesses. (I have no moral objection here—I've just never seen it accomplish anything.)

Management already has many opportunities during the year to communicate with the partners about *its* views and *its* sense of priorities. A partner meeting is one of the few occasions for the rest of the partners to be heard both by management and other partners.

At the end of the meeting, management's job is to stand up and say, "We've listened to you all weekend, and here are the highlights of what we've heard you say. We now make you a promise that we will go away and deliberate, and we'll come back to you with a concrete action plan. We will undertake to put a specific proposal in front of you within X weeks."

Of course, to pull this off requires preparation, which many firms neglect. I am constantly surprised at retreats where issues are put up for discussion with little or no collection of special information on that issue. Vigorous, fact-free discussions then result. A well-run retreat, in my view, should have special data collected so that the discussion is based on an external reality, not just on previously held biases.

For example, if the topic is marketing or client service, has anyone polled or interviewed clients about the firm's strengths and weaknesses? If the topic is associate development, has anyone polled the associates on what they think

we do well and what we do poorly? If the topic is strategy, have the partners been polled (in advance and anonymously) on their sense of priorities and which initiatives have their highest interest?

If the topic is profitability, has any special in-depth analysis been done on precisely where the profits are coming from, which kinds of matters we make money on and which kinds we don't? Partner meeting discussions are too often incestuous: all about what we think about ourselves. It's a simple enough question, yet a frequently neglected one—if we want the partners to debate an issue, what facts can we put on the table that will enhance the debate?

An Example: Client Panels

A perfect example is provided by client panels. These are so powerful that I am tempted to recommend that they be an essential component of *every* all-partner meeting. Invite four, five or six good, existing clients of the firm and ask them to address these questions: What do we have to do to deserve and earn more of your business and to obtain unbeatable referrals from you? What should we be doing more of, what less of? Tell us how you buy, and what we can do that is likely to make us attractive to you?

Done at the beginning of a partner meeting, such panels enrich the subsequent discussion immensely, whether that discussion is to be about foreign offices, training, technology or marketing. The fact is that retreats and other partner meetings must be grounded in a marketplace reality, and there's no better way to get that information than straight from the horse's mouth.

And, of course, the mere presence of the clients sends an important signal to all

partners about the need to test the firm's policies and intentions against the clients' desires. To say, "Oh, yes, we did a client panel a few years back," is insufficient. Listening to the market is an ongoing activity, and I contend that a retreat is the ideal forum to conduct one.

Ensuring Discussion

If the essence of a good retreat is discussion, how do you ensure that a good discussion is held? Some firms deal with the problem of large groups by using "breakout" sessions, dividing the partners into a number of smaller, parallel discussion groups. I have become skeptical about whether breakouts are a productive use of time.

The problem is that if a small group is to tackle an issue of any substance (and it is clearly a waste of time if they do not) then they must be given *at least* 90 minutes for their deliberations and *at least* 30 to 45 minutes to report their conclusions. Nothing will have been accomplished if a small group has a discussion but the rest of the partners and management don't get to hear what they concluded.

If there are (as is typical) more than four breakout groups, it can consume a large amount of time just in reporting—and even that does not allow for the other partners to comment on or react to what the small group had to say. The partnership, in my view, will be better served by staying together and discussing issues together. If the goal of the retreat is to convince, persuade and build consensus, what is important is that everyone participates in the reasoning process, not just the conclusions. Reporting small group conclusions is insufficient for the purpose.

If the group stays together, this can mean a large meeting. How do you handle this? Appointing a facilitator (whether one of the partners or an outsider) is an obvious choice. A good facilitator should be able to "manage" a discussion with up to 100 people and sometimes more. The facilitator's job is to craft the subject matter for specific sessions, run the discussions and "moderate" the debate.

One virtue of a "neutral" outsider is that such a person can often play the St. Sebastian role of being the target for all the arrows, floating provocative ideas and challenging cherished (if hidden) beliefs the firm has about itself. If an outsider is running the discussion, the sessions are less likely to get out of control, particularly if the facilitator has a fund of stories and experiences about what other firms are doing that can be slotted in as quick lecturettes, thus commanding the floor and preventing unproductive discussions from continuing.

Voting Machines

In the last few years, technology has immensely improved the ability to run discussions with large groups. At many recent retreats, I have used a system of voting (or "audience response") machines. They work like this: Each participant has a keypad with buttons marked 1 to 10 and a Yes/No button. At any time during the meeting, with or without preplanning, the group can be polled as to their feelings about an issue or a proposed action.

They can be invited to agree or disagree with various propositions, vote on a rank ordering of priorities, estimate various percentages (for example, on the use of their time), indicate whether they support or oppose the last speaker and

any other types of questions. The results show up *immediately* on a screen visible to all. If someone feels the question was poorly phrased, then within a matter of seconds the poll can be taken again.

The first virtue of this system is that everyone is involved in expressing their views, not just the handful of people who choose to speak up. At the typical retreat, firm leaders always try to judge the “sense of the meeting,” but I have learned that this is uniformly unreliable.

I have been in many meetings where three speakers in a row pointed out the flaws in an idea, leaving a strong sense that the idea was being rejected by the partnership, only to discover that when invited to vote anonymously through the machines more than 90 percent of the partners supported the idea, though they did not wish to speak up.

Second, all views expressed with these machines are anonymous, which is no trivial matter. I long ago learned that what people will say openly and in public at a partner meeting is not always what they really believe. Anonymous voting uncovers what the partners truly believe and not what they feel stampeded into voting for.

Some firm leaders are a little nervous about this, asking, “But what if everyone votes against my proposal? Do I really want that rejection to be so open?” My answer is that if the partners don’t buy the idea, management is better off knowing this so it can get to work persuading, convincing, discussing and cajoling—in other words, leading. Professional firms are (usually) partnerships, and leaders must persuade, not tell.

The third virtue of voting machines is that they make the discussions so much

more productive, and that leads to a wise use of time. I have attended many meetings where an hour or more was spent discussing an issue on which everyone already agreed. A simple vote would have enabled the discussion leader to say, “OK, that’s a done deal. Let’s move on!”

If a vote is taken that shows the group is divided, then it is easy to list the pros and cons and then take the vote again 15 minutes later. If after 30 minutes of discussion the vote remains the same, it is clear that the discussion is changing no one’s mind, and it’s time to change course.

Finally, it should be noted that voting machines allow demographic information to be inputted, so that while still preserving individual anonymity, it is possible once a vote is taken to say, “Let’s see how the responses differ for younger partners versus older partners or how partners in different offices responded.” Subgroup averages like these can then be shown instantaneously on the screen.

It is necessary to restate that these machines are not intended to turn the meeting into a vehicle for decision making—the votes are positioned as a vehicle for taking a “preliminary sense of the meeting.” In such a role, this technology will enhance the value of any retreat.

Finally, what about outsiders in roles other than pure facilitation? If you do want to use an outsider, you must first decide whether you want your outsider to function as a speaker or as a consultant. Speakers will convey their own information but will not be able to address the specific circumstances of your firm—as in, “What does that mean for us?”

It is wise to organize an explicit discussion session immediately following a speaker's remarks to discuss implications, otherwise the speaker's ideas might disappear into the ether. Effectively, a speaker is primarily entertainment; he or she is rarely part of the change process.

The consultant route implies that you will prepare your outside consultant by sharing a great deal of information about the firm—financials, past strategic plans, client surveys and internal management memos. In addition, it is probably wise for the management committee to meet with the consultant prior to the retreat. If management disagrees with what the consultant believes, you're better off finding that out in advance and resolving any conflicts.

The management and consultant should share a mutual goal—helping the firm to improve—and this deserves more than a little scheming. If, as I have argued, a retreat is aimed at making something different occur in the practice, then both management and consultant must understand what it is that the firm wants to improve and precisely how the retreat can be used to make that happen. With the right planning and the right approach, retreats truly are an effective management tool.

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