



WSSFC 2024

Practice Management Track – Session 6

How to Have Effective Firm Retreats and Meetings

Presenters:

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Mike McKay, ActionCOACH, Milwaukee

About the Presenters...

Jessica M. Kramer is the managing partner of Kramer, Elkins & Watt, LLC in Madison. Jessica has been practicing in the Madison area since earning her law degree in 2004 and focuses her practice on commercial real estate with an emphasis on representing landlords, including manufactured home communities, throughout Wisconsin. She provides landlords with comprehensive representation, including drafting customized lease packages, prosecuting evictions, defending administrative actions such as fair housing complaints, and providing day to day advice on tricky tenant issues. Jessica's approach to her practice involves providing the right balance of appropriately aggressive advocacy clients desire and the practical advice they need. Jessica is a trial attorney by training and regularly litigates landlord-tenant matters, employment matters, and business disputes in both trial courts and courts of appeals.

Mike McKay is a founding Member and Majority Shareholder in ActionCOACH Milwaukee #1, LLC. After an undergraduate degree in Mathematics from Ripon College, Mike served 4 years in the US Army in Korea and Ft. Carson, CO. Then working in public and private manufacturing companies, Mike achieved his goal of becoming an executive of a billion-dollar company as Vice President, Global Supply Chain for Sanford Brands. He left the corporate world to start his ActionCOACH practice in 2012. Now an ActionCOACH Global Hall of Fame Member, and published author, Mike specializes his coaching on growing businesses and leaders.

Running Effective Firm Meetings and Retreats

Presented by:

Attorney Jessica M. Kramer
Kramer, Elkins & Watt, LLC

Mike McKay
Founder, ActionCOACH Milwaukee #1, LLC

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Today's Outcomes

Top 3 learning outcomes for today....

1. How to Maximize the Value and Efficiency of Your Meetings/Planning Sessions/Retreats
2. Why a Full Day Retreat May Be Just What Your Firm Needs
3. Simple Planning Tools to make sure ALL your meetings are focused on efficiency resulting in more billable hours and profit for your firm or office



1

Why (good) meetings are critical

If you're running a business – like a law firm - There are 3 critical purposes for meetings;

- a) Information sharing
- b) Decision Making
- c) Brainstorming

But, good meetings take some thought...



2

What Makes an Efficient Meeting

1. Purpose
2. Agenda
3. Timeframe
4. Tools



3

Tool - Strategic Positioning - Levels of thought

1. Owner
2. Board of Directors
3. President (Managing Partner?)
4. Do-er (Attorney)

Tool – Six Thinking Hats – Edward de Bono

1. White Hat - Data and Information. What we know. Facts and figures
2. Red Hat - Emotions and Feelings - gut feel, no justification
3. Black Hat - Caution and Critical Thinking - Everything that could go wrong
4. Yellow Hat - Optimism - Everything that could go right
5. Green Hat - Innovation - Creativity, new ideas, outside the box
6. Blue Hat - Controller - Manages the process, ensures all hats are heard from, agenda, keep on track

Why Consider a Retreat

1. Three things you can get out of a retreat that a shorter meeting just won't do
 - Training and development of your team
 - Strategic Planning
 - Culture Building
2. The agenda items for a retreat take more time and thought. Doing them in regular staff meetings is ineffective
3. These create long-term efficiency versus weekly accountability



6

Sample Meeting & Retreat

- Sample Small Firm Meeting Agenda (Appx A)
→ How you can improve your meetings
- Sample Retreat Timing Chart (Appx. B)
→ How you can utilize retreats
- Retreat Planning Cheat Sheet (Appx. C)



7

Sample Small Firm Meeting Agenda

[Weekly, biweekly, or monthly meetings]

Date & Time: Friday, October 18, 4:00-5:30 PM

Attendees: Partners

<u>Item</u>	<u>Information, Decision, Brainstorm</u>	<u>Notes / Action</u>
Finance		
A/R review & collection letters to send (see current A/R list)	D	
New staff member compensation	D	
Bank – shopping around	B	
Operations		
Staff performance	I	
Procedures updates	I	
Westlaw renewal – compare to Lexis (see quotes)	D	
Benefits - open enrollment plans	I	
Marketing & Events		
Madison Magazine/Super Lawyers ad options	D	
Firm holiday party	B	

RETREAT TIMING CHART – November 1, 2024

Time	What	Who	Music
7:30 – 8:00	Set Up <ul style="list-style-type: none"> • Tool Kits (reference materials) on Tables • Laptop projected to screen with agenda • Video/audio tested for anyone participating remotely • Water/food set out • Music 		Upbeat
8:00 – 8:30	Breakfast		-
8:30-8:40	Introductions and Agenda Review	Everyone	-
8:40 – 9:00	Meeting Purpose	Managing Partner	None
9:00 – 9:30	Reflection of the last year – what went well? What needs improvement?	Anyone	Thinking
9:30 – 9:45	Break		Upbeat
9:45 – 10:15	Gaps Worksheet – Where are we missing	Anyone	Thinking
10:15 – 12:00	Planning Block #1: End of Year Planning (see details below)	Anyone	Thinking
12:00 – 1:00	Lunch		Upbeat
1:00 – 2:30	Planning Block #2: Long Range Planning (next year, 3 year) (see details below)	Anyone	Thinking
2:30 – 2:45	Break		Upbeat
2:45 - 3:15	Discussion of 90-day plan: action items, next steps (fill in below)	Managing Partner	-
3:30 – 5:30	Team Building	Team	Upbeat

Planning Block #1 Agenda: End of Year Planning

1. Financial review, end of year tax planning
2. Budget for 2025
3. Benefits: changes to health plans, firm's contribution to premiums
4. Staff compensation, increases, bonuses

Planning Block #2 Agenda: Long Range Planning

1. Attorney quarterly marketing goals (memberships, presentations, publications)
2. Attorney production goals
 - a. Pricing/Rates
 - b. Growth within current base practice areas? Growth into adjacent practice areas? Decision tool: 6 thinking hats
3. Staffing needs – add a paralegal/support staff by mid-year
4. Process improvements:
 - a. Revisions to procedures, new procedures needed
 - b. Revisions to templates & intake forms
5. Cross training of support staff during 2025
6. Office space needs for the next year, next 3 years

90-Day Plan / Action Items

What	Who	By When
Schedule first presentation or publication of 2025	Each attorney	January 15, 2025
Send rate increase letters to clients	Office Manager	November 30, 2024
Draft job description and ad for new support staff position	Managing Partner & Office Manager	January 31, 2025

Planning Items	Outcome	Examples	Do This:
Define Objective of Meeting	What's the purpose of your meeting?	Options for goals are mission, vision, culture, information sharing, team bonding, etc.	This will be the core of your meeting. Deciding on what you want to accomplish will set the entire meeting plan
Choose Format	Choose the physical location of your meeting to align with it's purpose	Offsite, Onsite, travel, etc.	
Create agenda	Mix "work and play" but choose an agenda that supports your meeting objective	Communication channels, client onboarding process, revenue recognition, marketing	Focus your agenda on your main meeting objective
Logistics and Budget	Agenda, Venue, Accommodations, food, awards, activities and travel	Solo and Small Firm Practice conference	Start with the outcome you want and build your logistics around that outcome.
Engagement	Learn ahead of the meeting where your team is in relation to your main objective	Pre meeting survey, issues parking lot, Take aways from previous meetings	Make sure your team know that this is happening, what you want to get out of it, and that you want their participation
Incorporate Team Building	A higher-level capability for your people to work together to create product for you	This can be anything from an icebreaker from a book to a rage room or escape room	Your personality should show through this step. What type of team and type of people do you want in your firm?
Focus on learning and billable hours	If you don't have a better operating firm at the end of a retreat, why are you doing it?	Streamlined onboarding increases overall billables by 8%	

Planning Items	Outcome	Examples	Do This:
Open Communication	If people can't share their ideas and comments, you will not get the best result from them	Consider the "dome of silence" from Get Smart. Nothing you say in here leaves this room without your permission	The potential hardest step. If you're not a leader they trust, here is where it will show up
Follow Up	Action items and an implementation plan	90-day plan with up to 3 "big" objectives like process changes, etc.	No plan to follow up that will help increase efficiency of the firm means your retreat has been a failure

Example Filled Out:

Objective:	1. 2. 3.	What I want as a result is...
Format:	One Day Offsite	Relaxed, thinking atmosphere
Budget:	\$7500	+ - 10%
Location:	Nome, AK	Or maybe WI Dells
Pre – Engagement plan:	10 question survey to be done by...	Insight into what the team thinks our best opportunity is
Team Building Activity	Ropes course, or escape room	The team to do something together that's a challenge, but also fun
Focus	Money	A billable hour increase as a result of better teamwork and systems
Open Communication Plan	Dome of Silence	People trust me enough to share what they need to share.
Follow Up	90-day plan takeaway with accountabilities and weekly actions	With no plan, this will just be a waste of time and money
Facilitator	Yes – Mike McKay 😊	