Why one facilitator can't finish the argument

Half the argument is about clients. The other half is about compensation, equity and structure. We built our Business Planning Retreat so that someone in the room knows each.



Sam Coupland

Compensation, equity and structure are Sam's ground. Sam is a Director of FMRC and is considered the foremost authority on law firm valuations – he values more legal practices than anyone else in Australia. For more than 20 years he has advised small to mid-sized law firms on strategic planning, partner compensation, equity valuation and succession.

He works through those issues with more than 50 Australian and New Zealand practices a year.

> *"Most importantly for me, you were able to bring everyone onto the same page really effectively."*
>
> — Managing Partner



Sue-Ella Prodonovich

Clients and growth are my ground. I'm the Principal of Prodonovich Advisory and have spent more than 25 years on business development strategy in professional services, working with law and accounting firms on BD strategy, leadership and professional development programs, and client-listening initiatives. I'm also an Accredited Partner in Gardner & Co.'s Smarter Collaboration tools, built on Dr Heidi Gardner's research into how professionals collaborate, and I deliver public workshops such as Business Skills for Lawyers.

So when the conversation turns from winning clients to dividing the profits they bring in, it keeps going instead of being parked for another year. With two of us, one runs a discussion while the other watches the room and adds to the conversation. The managing partner also gets to argue their own corner instead of chairing.

1 Before the day

Two of those five problems - a coherent agenda, and partners who have done the reading - are where our preparation starts. We survey partners in advance on the firm's challenges, opportunities and priorities. Depending on the firm, we may also review financial data, the client base, or feedback from staff and clients.

Their answers shape the agenda and a discussion paper everyone reads (or listens to) before the day. Partners see their own views on the page before they walk in, and the survey shows up in the room instead of in the bin.

Nobody spends the morning finding out where the disagreements are.

One Senior Litigation Partner admitted he arrived expecting little (he just wanted the day to end).

His verdict: "Your session was intelligent, affirmative and informed. I actually learnt something."

2 On the day

The agenda is built around your firm: structured sessions, facilitated discussion and task-based workgroups. The ground usually covered:

- What success looks like in two to five years (income, team, services and client base).
- The firm's significant strategic issues, and what needs to change to address them.
- Business development: how the firm attracts new clients and deepens existing relationships.
- People and structure: how the firm is organised to deliver on its ambitions.

3 At the end

Partners leave with a summary of actions and a broadbrush plan for agreed significant strategic issues. There's no orphaned to-do list.

Not every partner leaves agreeing on everything, but every partner leaves knowing where the firm stands and who is doing what.

At the next partners' meeting, the managing partner can check progress instead of rerunning the argument.

Is this for your firm?

- The program suits law firms and practice groups with fewer than 20 partners that are serious about their next chapter - growth, stabilisation, succession or a structural change.
- We deliver in person, over one day or a day and a half, across Australia and New Zealand. Investment starts from $12,000 plus GST.
- We need around 12 weeks to prepare, because the survey, analysis and discussion paper help drive the day's value.
- Talk to Sue-Ella on +61 411 780 255 or sueella@prodonovich.com.au.

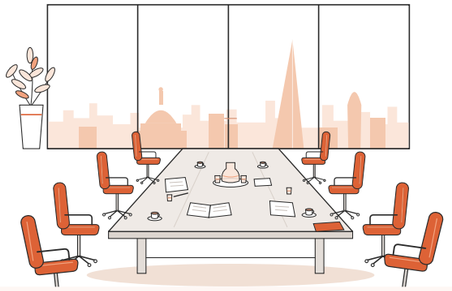
Prodonovich ADVISORY

Eight ways a partners' retreat goes wrong and the five you can fix before the day

What a Managing Partner can do in the 12 weeks before the 2027 planning day

BY SUE-ELLA PRODONOVICH

A few years ago I wrote about the eight biggest problems I see at firm retreats. They haven't gone away and there's a new one I hear - "Please, no more AI!". But look at the eight again and something stands out: five of them are locked in before anyone walks into the room. And anything locked in before the day can be fixed before the day.



> *We leave with a list of actions nobody owns. Then we do it all again next year."*
>
> — A partner, describing their firm's planning days

Five of the eight problems are fixed before anyone arrives.

CONTINUED ON PAGE 2

IN THIS REPORT

The one retreat job a managing partner can't hand to the juniors (page 2)

Who shouldn't be at your planning day (page 2)

The column to add between "who" and "when" on your action plan (page 3)

Why the strategy survey you sent your partners may be the reason they switched off (page 2)

What to agree before you add a single new initiative (page 3)

The argument most smaller firms carry but don't air, and why a planning day that handles only half of it fails (page 3)

Who ends up talking loudest when nobody has done the reading (page 2)

The four kinds of practice in every firm, and why sorting them shortens the argument about money (page 3)

How a retreat ends without an orphaned to-do list (page 4)

Five problems you can fix before the day

1 The senior partners aren't in it from the start

Nothing undermines a retreat faster than senior partners arriving late and leaving early — or not coming at all. Nobody takes a day seriously if the boss doesn't.

THE FIX: own the day from the beginning. Don't leave the agenda and the planning to the juniors. This is the strategic direction of your firm, and that's your job.

2 There's no coherent agenda

Fee earners fill in a survey about the firm's strategy. Then the survey gets binned, the threads aren't followed, and the program takes a little from here and a little from there.

THE FIX: match the agenda to the firm's strategic objectives, and use what the survey tells you. If you ask partners what they think, the day has to show they were heard.

3 Nobody reads beforehand

So the partner who knows least about the topic talks loudest.

THE FIX: give partners material worth reading, and time to read it.

4 Nobody gets any slack

Time is money. Take partners away from their targets without allowance and they'll prepare badly, arrive distracted and leave early.

THE FIX: give them a few hours to prepare, and don't let them duck out to get back to work. A retreat that serves its purpose is worth a few billed hours.

5 The client guest speakers are in the room

There's a time and a place to hear from clients about how they want to be treated. Your planning day isn't it.

THE FIX: leave the client guest speakers for another day, and keep the planning to your own partners.

Before your next planning day

- Own the day yourself — don't hand the agenda to the juniors
- Match the agenda to your strategic objectives, and use what the survey tells you
- Give partners material worth reading
- Let them off their targets for a few hours to read it
- Leave the client guest speakers for another day

> *"The partner who knows least about the topic talks loudest."*

THREE MORE WAYS A RETREAT GOES WRONG — ON THE DAY ITSELF

1. The partners don't like each other. No cooking class or ropes course cures a culture problem. That needs a deeper fix than a day away.
2. The elephants get ignored. If it's been a bad year, say so. Everyone will see through a retreat built on "everything's great".
3. People behave badly. Big personalities, rivalry, unresolved tension and an open bar never end well. Set some ground rules.

Give the day something to work on

THREE TOOLS MAKE THE PREPARATION COUNT.

Start with what you'll ditch

Most planning adds activities. Begin by agreeing what the firm will reduce or stop doing.

Map your practices

Sort them by growth prospects and relative fee rates.

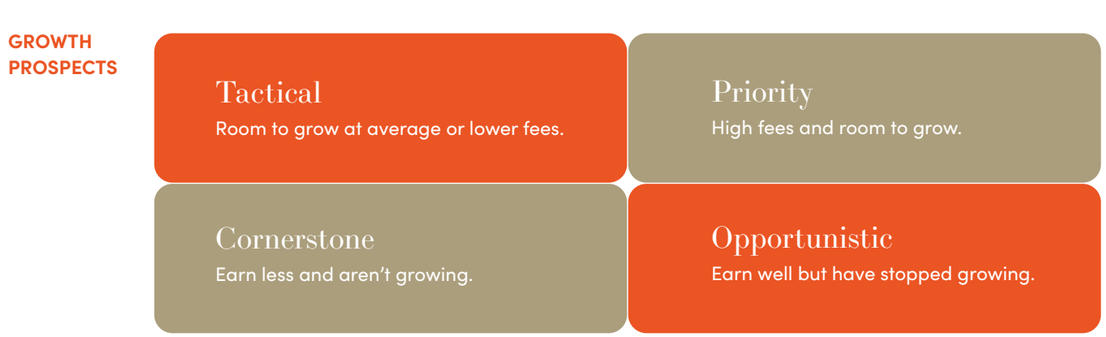
Once every partner is looking at the same map, the argument about where to put the firm's time and money gets shorter.

Add a "This depends on…" column

Every action plan has a "who" and a "when". Put a column between them for what each action depends on.

That column covers the gap between making someone accountable and getting it done.

> *"Some partners want to grow. Others want to protect what they have. A few are thinking about succession."*



The argument underneath

Fix those five problems and the day will run well. Whether the day produces anything depends on something else.

That something else is the argument most smaller firms carry but don't air. Some partners want to grow. Others want to protect what they have. A few are thinking about succession. In the normal run of business the argument stays under the surface, and when it breaks through, it's at the wrong moment with the wrong audience.

And the argument doesn't stay on clients and growth. The partner who wants to grow is talking about clients. The partner who wants to protect what the firm has, or plan for succession, is talking about compensation, equity and structure. A planning day that can handle only one half of that argument leaves the other half for the car park.