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I once facilitated a partner retreat of a 15 partner firm. Actually I co-facilitated it with the firm's MP, a very dominant guy.

He started off the retreat by citing the results of the last 10 year's retreats, identifying dozens of retreat goals that had not only been implemented but had directly fueled

the firm's meteoric growth during the past decade. This was his way of challenging

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**What if the partners want a different retreat agenda than the MP?** In many cases, MPs have good ideas of topics for the retreat. After MPs tell me their ideas, I ask: "What do your *partners* want to address? To do this, I have devised a 10 minute retreat survey for each partner to complete. I summarize the responses and discuss them with the MP. In many cases, the issues of most concern to the partners took the MP by surprise. So the final agenda is optimized because it includes topics that both the MP and the partner group want to discuss and resolve. As a result, the retreat is more successful because the agenda is set properly.

**What if the partners don't want to discuss a topic that is a glaring problem?**

Examples would be accountability, method for allocating partner income and what the partners are doing to bring in business. You can see the common thread to these examples: They are all important to the firm's success but the partners don't want to address them because the result may introduce changes the partners don't wish to face.

Retreats are not intended to be a walk on the beach. Effective retreats address tough issues. A healthy amount of conflict and disagreement serves as evidence that the group is addressing important, sensitive issues. Firms that adhere to these guidelines understand that sweeping problems under the carpet only creates lumps.

This is where an effective MP or an outside facilitator helps. They use their leadership skills to compel the partners to face what they are afraid of.

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**[CPA Firm Retreats: The Do-It-Yourself Guide](#)** was written to help firms organize their retreats and for those firms preferring their MPs to facilitate the retreats instead of an outside facilitator, a guide for how to lead a retreat. Chapters include ►ground rules for participants, ►alternative retreat formats, ►logistics and ►how to implement retreat ideas. Half the book provides specific discussion questions that

*the facilitator can use to stimulate conversation in topics such as ►profitability,*

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felt the controversy over these issues would certainly result in heated arguments and conflict. The MP wanted a nice, informal, leisurely retreat where everyone bonded, had a good time and walked away with smiles on their faces.

What a mistake! As facilitator, I should never have agreed to these restrictions. At the retreat, when it became clear to the partners that these important, sensitive issues were not on the agenda, a few of the partners were furious – with both the MP and me! The partners brought the issues up despite them not being on the agenda, and tensions flared, to the dismay of the MP.

So, what lessons are learned from this? (1) Never avoid big problems, (2) As facilitator, never submit to restrictions that will make it difficult to be effective.

**Get input from the staff.** Before the term “transparency” became in vogue a few years ago, the best firms routinely figured out ways to involve their staff in partner retreats. They did this in two ways: (1) Inviting high level staff (usually managers and high-level admin staff) to the parts of the retreat that weren't confidential and (2) devised ways for the staff to have input in the retreat even if they didn't attend. One way is to survey the staff. But an even better way is to convene a staff-only retreat prior to the partner retreat.

The message is simple: Including staff in the partner retreat is a win-win for the staff and the firm. **For staff**, it gives them a feeling of inclusion. They like the opportunity to provide input into the direction of the firm and the formation of policies and procedures. They feel good that the firm is interested in what they have to say. **For the firm**, decisions made at the retreat will be better and more informed because input of the partners is supplemented with input from the staff. This collaborative process yields better results.

**Our firm never implements retreat ideas. How can we change this?** (1) Make sure that every discussion concludes with a set of action steps, assigned to one or more

individuals with a deadline, (2) Prepare a summary of the retreat that makes it

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