

## ONE-DAY FIRM RETREAT – Sample Agenda

### NAME OF FIRM

Date – Venue

### AGENDA

- |         |   |
|---------|---|
| 9:00am  | <b>Introductions, Session Overview and Objectives</b>   |
| 9:15    | <b>Today's Best Practices in Law Firm Marketing</b> <ul style="list-style-type: none"><li>- Getting Closer to Existing Clients</li><li>- Attracting and Retaining New Clients</li><li>- Practical Tips for Busy Attorneys</li></ul>   |
| 10:15   | <b>Keys to Successful Implementation</b> <ul style="list-style-type: none"><li>- Limited Priorities</li><li>- Focus and Perseverance</li><li>- Adequate Resources</li></ul>   |
| 10:45   | <b>Coffer Break</b>   |
| 11:00   | <b>The Importance of "Firm First" Culture and Mindset</b> <ul style="list-style-type: none"><li>- Survey Highlights: "Why Some Firms Fail, While Others Succeed"</li><li>- Trust, Shared Goals, Vision, Leadership, Planning, Communication</li></ul>   |
| 11:15   | <b>Practical Tips for Individual Attorneys</b><br><b>Individual Attorney Marketing Plans</b> <ul style="list-style-type: none"><li>- Consistent with Firm Goals</li><li>- Realistic, Achievable and Specific</li><li>- Plays to Your Strengths</li><li>- Monitoring and Accountability</li><li>- Rewards and Incentives</li></ul> |
| 12:30pm | <b>Luncheon</b>   |
| 1:30    | <b>Golf Tournament</b> <ul style="list-style-type: none"><li>- Four-ball scramble with shotgun start</li></ul>  |
| 5:50    | <b>Reception</b>  |
| 6:30    | <b>Awards Dinner</b>  |
| 8:00    | <b>Adjournment</b>  |

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