

## TWO-DAY FIRM RETREAT – Sample Agenda

### NAME OF FRIM

Date – Venue

### AGENDA

#### Friday - Equity Shareholders Only

- |       |   |
|-------|---|
| 8:30  | <b>Continental Breakfast</b>  |
| 9:00  | <b>Today's Objectives</b>   |
| 9:15  | <b>Characteristics of Today's Most Successful Law Firms<br/>How Are We Doing?</b> <ul style="list-style-type: none"><li>- "Firm First" Culture and Mindset</li><li>- Trust, Shared Goals, Vision, Leadership</li><li>- Strategic Planning, Implementation</li><li>- Results of MPF Surveys</li></ul>  |
| 10:00 | <b>Report on One-on-One Meetings</b> <ul style="list-style-type: none"><li>- Pressing Issues</li><li>- Recommendations</li></ul>  |
| 10:30 | <b>Coffee Break</b>   |
| 10:45 | <b>Chief Operating Officer</b> <ul style="list-style-type: none"><li>- Proposed job description</li><li>- Proposal to conduct job search</li></ul>  |
| 11:15 | <b>Firm Governance</b> <ul style="list-style-type: none"><li>- Member category evaluation</li><li>- Criteria to Become a Shareholder</li></ul>  |
| 11:45 | <b>Main Office Lease</b>  |
| 12:45 | <b>Luncheon</b>   |
| 1:30  | <b>Strategic Priorities for 2008</b> <ul style="list-style-type: none"><li>- Identify and Build Core Areas of Practice</li><li>- Enhance Profitability – rates, leverage, marketing, productivity</li><li>- Improve Internal Communication, Information Sharing</li><li>- Implement Firm-wide Marketing Initiatives</li><li>- Devise System of Accountability</li></ul> |
| 2:45  | <b>Coffee Break</b>   |
| 3:00  | <b>Firm-wide Strategic Objectives for 2008 - continued</b>  |

- 4:00                    **Adjournment**
- 6:00                    **Reception** – Shareholder and Invited Attorneys
- 7:00                    **Dinner** – Shareholders and Invited Attorneys

**Saturday** – Shareholders and Invited Attorneys

- 8:30                    **Continental Breakfast**
- 9:00                    **Today's Objectives**
- 9:15                    **Today's Best Practices in Law Firm Marketing**  
- Enhancing Relationships with Existing Clients  
- Converting Prospects into Clients  
- Keys to Successful Implementation
- 10:00                  **Practical Tips for Busy Attorneys**  
- Individual Attorney Marketing Plans  
- Consistent with Firm Goals  
- Realistic, Achievable and Specific  
- Plays to Individuals' Strengths
- 10:45                  **Coffee Break**
- 11:00                  **Firm-wide Strategic Objectives for 2008**  
- Chief Operating Officer  
- Firm Governance, Internal Communication, Information Sharing  
- Core Areas of Practice  
- Program to Enhance Profitability  
- Firm-wide Marketing Initiatives
- 12:30                  **Luncheon**
- 1:30                    **Office Priorities for 2008**  
- Miami  
- Atlanta  
- Dallas
- 2:45                    **Coffee Break**
- 3:00                    **Other Issues**
- 4:00                    **Adjournment**

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