

# Law Firm Department Retreats

Retreats allow a department's lawyers (and, if desired, paralegals) to gather and learn substantive management skills. Retreats also afford a legal department an opportunity to learn more from its client satisfaction results. Most client satisfaction studies generate statistical findings from surveys or reports based on client interviews, and retreats can benefit from in-depth discussions of this feedback.

Some goals of such a retreat include raising awareness of the importance of meeting client needs; showing attendees the significant results of client surveys or interviews; and involving them in deciding how best to respond to those results.

Simply raising the consciousness of legal department members about the importance of satisfying clients can prove beneficial. More tellingly, stating what actions the legal department and its individual members should undertake during the coming year as a result of these findings increases the likelihood changes will be made. The six techniques below can make client satisfaction surveys an exciting part of retreats.

## **1. Take action on the weakest important attributes.**

Client satisfaction findings should show the attributes that are most important to clients—typically, timeliness and a balanced view of legal risks—and how clients rate the performance of the legal department on those attributes. The most important attributes with the lowest ratings stand out as targets for immediate action.

Before a retreat, management of the department can choose three or four of the attributes that appear to need the most improvement, based on importance and rating. Then, during the retreat, the legal department can divide into working groups. Assigned an attribute, each group can catalog and prioritize steps it believes the legal department could take to improve that attribute. During the retreat of a pharmaceutical company, for instance, more than 100 lawyers and paralegals were asked to consider 10 attributes of client satisfaction. These were the 10 attributes deemed most crucial by clients, according to a recent survey of client satisfaction. For example, clients might have faulted the legal department for giving too much business advice.

A working group could decide that the legal department should establish a training program for its lawyers; draft a statement of guidelines clarifying the differences between legal advice and business advice; set up meetings with key clients to understand the grievance better; circulate material about loss of attorney/client privilege; or advocate other measures. The suggested actions need to be SMART—Specific, Measurable, Achievable, Realistic, and Timely (i.e., accomplished in a reasonable time frame).

In many, the working group should present its conclusions to the full group. The full group can decide on the handful of areas that it wants to focus on during the coming year, wrestle them to the ground, and commit to improvements agreed on at the meeting.

## **2. Learn from other legal departments.**

Another step that a legal department might take in anticipation of the retreat is to have a few members call other legal departments to find out how they have surveyed client satisfaction and responded to the findings. Since most sizeable legal departments conduct some kind of client satisfaction survey, the investigators can provide brief case studies of what other legal departments are doing.

## **3. Compare lawyer scores to client scores.**

Another technique for linking a retreat to client satisfaction results appealed to one particular insurance company. There, the lawyers completed the same survey the clients did. The attorneys answered the survey as if they were evaluating the legal department. The results of the two surveys were compared at the retreat. On most attributes, the legal department was more critical of itself than were its clients. On a few attributes, such as clarity of communications, the legal department thought better of itself than did its clients. The remainder of the retreat session focused on those attributes that were reasonably important to clients and where the legal department thought least of itself.

## **4. Compare lawyer estimates of clients' scores to actual scores.**

The attorneys at one major pharmaceutical company ventured a variation. They assessed their legal department through the eyes of their clients and tried to reproduce the scores they thought the clients had given of their department's performance. Again, the comparison, the resulting discussion and the targeting of certain behaviors led to improvements in the legal department.

## **5. Consider trends of scores over time or across sections.**

Another technique depends on the legal department having conducted surveys over the course of several years. If it has, the group can look at trends in satisfaction. The plenary group, or breakouts, should focus on significant changes for the worse in any scores. The retreat session might try to pick out management changes within the legal department that may correlate with client satisfaction scores. If the law "ratings" have gone down, could it be that the legal department is either hiring newer attorneys or devoting less time to being at clients' sites? The legal department of one major insurer gathers client satisfaction scores for each of its several sections in the departments. That kind of internal comparative data, even if it does not span multiple years, can lead to spirited discussions.

## **6. Invite a panel of clients.**

Enliven a retreat by inviting a panel of clients. The more senior the client, the more persuasive their statements- especially their corroboration of the accuracy of client satisfaction scores. Clients also can offer examples of undesirable behavior.

Your observations apply to all these suggestions for weaving client satisfaction into a retreat.

First, since retreats generate ideas, someone in each group and plenary session should have responsibility for recording the ideas and circulating them afterward. Too often, excellent ideas slip away once the meeting is over. More importantly, scribes should record accountabilities. Accountabilities are agreements by particular people to complete particular tasks by a certain date.

Second, a legal department may get greater value from its retreat if an outside facilitator or consultant keeps the discussion moving, introduces ideas from other law departments, and provides a counterpoint to remarks made by the members of the legal department.

Third, how clients perceive the performance of the legal department should shape the legal department's strategic thinking. What services—litigation management, for example—and attributes—such as clarity of writing—are key to clients, and their ratings of the department's performance, cast the headlights far down the road the legal department wants to travel.

Finally, when lawyers begin wrestling with the conclusions of a client satisfaction study, they inevitably tap into deeper issues. What should be the role of the legal department? How do clients actually perceive the role? To what degree would better preparation by clients raise satisfaction scores of the legal department? How do outside counsel play a role in client satisfaction? A healthy and well-managed legal department puts its shoulder to each of these boulders.