

Retreats – The Edge Approach

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In every endeavor there is an optimum way of doing things. The art of sculpting a retreat is no exception. So the content for your retreat should not be prescribed externally. Beware the consultant with a hammer to whom all the world is a nail. No matter how tempting it is to pull a previous experience out of the hat and simply replicate it, it is a path fraught with peril and is of low utility. (Can you apply to one trial the precise plan from a previous one? Does one corporate acquisition exactly replicate another?) Each firm is unique as are its current circumstances. At Edge, we favor an interactive approach – team working between the firm's leadership and us as consultants — in creating your retreat to achieve optimal results.

What your firm knows

Most firms who retain us have a general sense of what they want to accomplish. Typically, firms specify objectives like: we want our people to have a chance to get to know one another especially from diverse practice groups or even geographical locations. Also, we want them not only to buy into our strategy but to behave in a manner consistent with achieving its objectives. (Sometimes the thrust of the objectives will be directed toward skill acquisition or awareness building on anything from leadership and management to group dynamics to client-relations skills.)

What your firm needs our help to ascertain

Now, how, we are often asked, do you people at Edge go about helping us accomplish this? Do you have any sample agendas or examples of what you do that fits? Maybe you can tell us what you have done in the past. What the firms are really asking us is — what is this retreat going to actually look like?

Listening

When we at Edge discuss a retreat with a potential client, our priority is listening to you describe your definition of a successful retreat. The key questions are:

- In order for you to walk out of the retreat with the sense that this was amazing, it accomplished everything you had hoped for, what needs to have occurred?
- What might you have been concerned about that you wanted to ensure did not occur (perhaps a repeat of a previous unhappy, or marginal, experience)?

The tools and resources

Having worked with hundreds of firms all over the world and with the diversity of capabilities and experience within Edge, we are able to provide retreat experiences that do everything from create plans to accepting and executing plans, measuring profit drivers, culture, training in leadership and management skills and client relation skills, to mention a few. The challenge is not determining what we can do – it is determining what would be optimum for your firm in light of its unique objectives and structure.

The journey from abstract objectives to specific options

The questions above are only the beginning. Two things tend to happen.

Firstly, we work with your firms management committee or the retreat planning committee to develop retreat objectives in a specific, focused and productive process. Perhaps it is because your committee members are speaking to each other in front of an outsider or because their discussion is being facilitated, they begin to learn things about their own desires and requirements that they probably have not articulated before. They also fine-tune each others' ideas – in effect, negotiating the nuances.

Secondly, with relevant supplemental questions, we begin moving from the abstract to the specific and give people a chance to react to options. For example, is it appropriate to use breakout groups, how does the firm respond to facilitated sessions, if

associates are invited, should there be some separate sessions for partners and associates and dozens of other specific issues. The importance of this process is that we are measuring your interest in a variety of approaches to hone in on a recipe that will best suit your preferences and needs.

In essence, our job is to create a menu from which you choose

By incorporating our experience and expertise in creating options, (even options within options), a menu is born from which your firm can choose. The interactivity of this process allows us to warn of toxic combinations or other perils that we have observed in the past as well as highlight effective processes and approaches that we have seen garner favor. The retreat must be customized to the firm. Nothing frustrates participants more than to believe they are being exposed to a canned pre-recorded piece of boilerplate that could have been presented to any firm on any day – and nothing yields less satisfaction.

The Promise of results

We guarantee satisfaction on the part of our clients. We demand of ourselves that you find value in our intervention. We are obsessed with being valuable from your perspective. We will always tell you the truth about which of the options we jointly conceive will be most likely to create the result you want as well as listen to your preferences. So, with your indulgence, the process of customizing your retreat pays large mutual benefits – for you: satisfaction, satisfied participants, achieving retreat objectives and goals... and for us, the maintenance of a reputation to help you do just that.

The Initial discussions are always on us

While we're learning how we might serve you and while you are assessing our approach and capabilities, the meter remains off. When retained, we'll agree on a fixed fee that will include unlimited preparation, attendance at the key event, and a comprehensive debrief.

Feel free to contact any one of us, below, or simply contact inquiries@edge.ai

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