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Management

Planning Successful Law Firm Retreats

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by [Christy Burke](#)

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Before you plan your next firm retreat make sure you understand and identify the objectives, or as Christy Burke suggests first the Why, then the Where. Following a clear vision of the event's purpose will have an enormous impact on the success of your event.

At the outset, planning a retreat for your law firm may seem rather straightforward, requiring slightly more forethought than the firm's holiday party. However, considering the number of participants, the level of quality expected, and the cost of the typical venue, organizing successful retreats can be rigorous and challenging. While the retreat needs to be enjoyable and allow attorneys to socialize, the event must be focused on meaningful objectives that will further the aims of the firm. Through careful planning, leveraging of technology and solid backing from the firm's leadership, your retreat can be a great success. In just a day or two, well-executed retreats have potential to yield immediate positive results, build loyalty and generate momentum.

First the *Why*, then the *Where*

Retreat planners are often in a hurry to pick the retreat's venue, assuming that everything else will "flow" from that decision. However, you are better off determining what your objectives are for the retreat prior to choosing the hotel or resort. Will it be a working retreat where you are tackling big picture issues like marketing, strategy or leadership changes? Or will it be more socially oriented, perhaps as an opportunity to bring together attorneys from multiple offices so they can meet and discover cross-selling opportunities? These are issues that need to be determined by the retreat committee or executives of the firm. Consensus and clear decisions from the firm's leadership are of utmost importance before the retreat planners can get the event off the ground.

LawBiz Management Company's Ed Poll (www.lawbiz.com) is an expert on planning law firm retreats. Poll emphasizes that the aim of the retreat comes first, and then the logistics can be built around that stated purpose.

Commonly seen objectives to hold a retreat include:

1. Building social camaraderie
2. Coming to a conclusion or consensus on a specific subject
3. Marketing and business development
4. Reward for a successful year

If you have not planned a retreat before, Poll suggests joining Meeting Planners International (www.mpiweb.org) which provides education and resources geared specifically for your needs.

Venue Selection and Curriculum

The nature of the retreat will determine what kind of facility you'll need. For working retreats, you will need meeting rooms for breakout sessions. For social retreats, you may want a resort with a beach, golf course, tennis, or other activities readily available. The retreat objectives need to be agreed upon by key executives and must be communicated to the event planners. Poll recommends a minimum of 6-9 months of lead time for planning a retreat. Locations book up quickly, especially in large cities and popular resorts, so planning ahead is critical.

The Value of the RFP

A Request for Proposal (RFP) is an effective way of gathering information on various venues. The process of creating the RFP also prompts you to organize your thoughts and priorities for the event ahead of time.

Drinker Biddle & Reath ("DBR"), whose main office is in Philadelphia (www.drinkerbiddle.com), set out to do a May 2006 retreat to mark a leadership change and to signify a change in direction. DBR office administrator Beth Boyer explains that since DBR has offices spread out throughout the U.S., their location choices were seemingly limitless. To narrow down their search, DBR sent out RFPs to two major national hotel chains – the Four Seasons and the Ritz Carlton. When the RFP responses came back, they selected the South Beach Ritz Carlton, which had demonstrated responsive customer service, was geographically desirable, and had all the facilities they needed for the practice group area meetings and the breakout sessions. Boyer recalls that the hotel assigned an account manager to be their single point of contact, which was extremely helpful.

"The retreat should reflect the culture of the firm," says Ward Bower, a Principal of Altman Weil (www.altmanweil.com) which has organized law firm retreats for 25 years. "While popular in corporate America, New Age 'touchy-feely' approaches do not necessarily work with lawyers – they do not want to expose their weaknesses or look foolish in front of their peers," says Bower. That said, lawyers do like to talk so putting them in a position to do that will make them feel comfortable and productive. Lectures are great for conveying information, but don't be surprised if the lawyers are e-mailing on their Blackberrys during the session. Combining lectures with small group breakout sessions engages the attendees and handily discourages PDA distractions at the same time.

Bower's experience tells him that working sessions are great, but he cautions that more than eight hours of sessions in a day can lead to burnout. If possible, Bower suggests work sessions in the morning and socially-oriented activities in the afternoon. Aiming for a balance between work and play will ensure that the retreat will be memorable as well as productive.

Leveraging Technology

The task of organizing a retreat will often accentuate the fact that the firm's contact database is incomplete or disorganized, even sometimes for lawyers at the firm and guests. Many firms use a combination of Excel spreadsheets and e-mail to communicate with attendees, but some tech-savvy marketing teams have discovered increased efficiency through technologies that are specifically geared toward assisting in the process, and are also easy to learn.

Jennifer Sebeny, director of marketing for McKee Nelson (www.mckeenelson.com), was faced with putting together the firm's first-ever partner retreat in June of 2006. A relatively new firm with Washington D.C. and New York offices, McKee needed to put on a successful event to set a precedent for quality and professionalism. With 100 total attendees including partners and their spouses, there was an enormous amount of coordinating to be done, much of it via e-mail.

McKee had recently rolled out a CRM (Customer Relationship Management) software called ContactEase (www.colevalley.com). The CRM system allowed Sebeny to automate the entire registration process. Each participant received a link via e-mail. Once clicking on the link, the attorney could verify information such as arrival and departure times, dietary restrictions, activity signups, contact information. The information was then stored in the ContactEase database, allowing for Sebeny's team to track all of the information and generate reports for their purposes. Her marketing department is often asked to do events and the CRM system allowed her team to provide better customer service. Drinker Biddle also recently installed the ContactEase system and plans to use the product to coordinate its next retreat.

Security and Confidentiality

In preparing for a retreat, the sensitivity of the subject matter to be discussed will determine the degree of confidentiality of the retreat handouts. Remember that while attorneys are vigilant in protecting their clients' documents, they may be less careful with internally distributed materials. Bower recalls stories of firm strategy documents being mistakenly left on planes or lying on desks in plain view of any passerby. Bower recommends that important documents be distributed at the retreat, not before. In some cases, he even suggests numbering the hard copy documents and collecting them at the retreat's end to ensure that all copies are accounted for.

Security must be a consideration when you choose the event site. When booking a date for your retreat, be sure to inform your hotel contact of who your competitors are, especially if your retreat will entail discussing your firm's strategic or marketing plan. The last thing you want is for attorneys to arrive at the resort only to realize that a competitive firm is also having an event at the hotel. Attorneys will be reluctant to freely discuss these issues due to concerns that the other firm could potentially overhear confidential data.

Conclusion

Organizing retreats can be intimidating, but there are many resources you can draw upon to ensure a successful event. Following a clear vision of the event's purpose, as well as equipping yourself with the right contacts and technology, will optimize your success rate. Retreats done well can have enormous impact on the firm's bottom line as well as soft benefits like morale and teambuilding.

About the Author

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