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MARKETING THE LAW FIRM

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It's Time for Post-Pandemic Law Firm Retreats

By Sharon Meit Abrahams

After two years of cancelled, postponed or virtualized versions, in-person retreats are finally back. In late January after the post-holiday Omicron surge, I spoke at a retreat held in a lovely resort in Florida. It was interesting to experience post pandemic preparations and procedures. After the usual planning questions surrounding content and audio-visual needs there was a set of questions around COVID safety and procedures. Aside from those it was business as usual. After a two-year hiatus it's time to refresh ourselves on why and how to run a safe and healthy in-person retreat.

Why?

Does your firm want a retreat to reconnect with each other, to tackle business issues, or a combination of both? You need to understand the rationale for the retreat before you start making any arrangements. If top management does not have a clear vision for the retreat, then all the efforts will be misguided, and you will start and stop multiple times. The goal is for people to walk away with a memorable and valuable experience. One goal that should be on the list is for those attorneys who joined during the remote work period meet and break bread with their new colleagues.

One of the goals of the January retreat I participated in was around stress management and finding happiness in the practice. With the ongoing discussions in the media around attorney mental health, it would be proactive and well received by the attendees to have some time devoted to well-being activities.

Where?

Location can drive many aspects of retreat planning. The facility you choose should fit your basic criteria for size, food service and activity. The size of the facility is important to ensure that everyone who plans to attend can be accommodated on the main property. No one wants to be relegated to the hotel down the street just because they found out at the last minute they could attend.

As COVID restrictions are being lifted around the U.S., it might be helpful to find locations that accommodate your firm's sensitives. Are the meeting rooms big enough to properly social distance and will the food be served by staff or buffet style? Decide what best fits your firm's culture and current health policies. Be sure to inquire when booking so your attendees will feel safe and comfortable.

The location you choose will lend itself to the overall success for your retreat. If the property is beautiful, the staff helpful, and the accommodations comfortable, the retreat will be enjoyable. Funny enough, the retreat in Florida happened to occur when a Nor'easter hit, bringing the temperature down to the 30s (only the northerners went golfing).

What?

Planning what to do at a retreat is where the creativity comes into place. If the retreat is purely social, then activities geared around getting to know each other can be fun. Team activities that mix up attorneys from different departments or offices allows them to interact in a fun, yet structured, way.

If the retreat has a business program, then the agenda will take greater effort. You need to understand the goals and outcomes that are desired by leadership. The agenda can have multiple topics, or one theme addressed in a variety of ways.

When?

The timing of a retreat is important to maximize attendance. If you have a particular billing cycle or annual collections push, then a retreat bumped up to this would crunch the attorneys and some might back out if they haven't met their numbers. Summer, which is a good time for some locations, may interfere with planned family vacations. Looking at holiday schedules, school vacations and even major sporting events is critical to ensure the attendance you want.

A retreat planned just after the first of the year would be good timing to celebrate a successful year. A retreat planned for the fall would be good for strategic planning, budgeting, and goal setting for the next year. The retreat I attended was both a celebration of the prior year and a planning session for 2022.

Who?

If a firm is small and manageable in size, the "who should be invited?" question might not be overwhelming, but if your firm has over 200 lawyers, then the price tag for a weekend rises exponentially. Should all attorneys be invited? Just partners? Just senior partners? Should you have different retreats for different levels? An associates one-day get away might be a lot cheaper to handle than inviting them to join in a weekend of resort living. A senior partner planning retreat can replace an all-out bash for everyone and has an easier cost/benefit analysis to prove to the CFO. When deciding who should attend, rest assured that someone will be unhappy, especially if this year's roster will be different from previous years.

How?

A basic plan that includes a timeline is key to a successful retreat. Start at the end and work your way backwards. Of course, there are two things that must happen before you can even start your timeline — pick the date and secure the location. Once these two things are chosen, you can start planning. The key aspects of the plan are:

1. **Theme.** All good parties have a theme and let's face it; a purely social retreat is a weekend long party. For a business meeting the theme would be more of a slogan or sound bite like: "world class," "client-focused," or "collaboration." Theme material should appear on agendas, invitations, and all correspondence.

2. **Contracts.** Negotiate everything on the contract and ask for everything you need to be included. Try to plan for all possible eventualities and account for them in the contract.
3. **Invitations.** Once you have a theme, the dates, and the location, you can design and send the invitations. Use your creativity and produce something that reflects the culture of the firm and the attitude set for the retreat.
4. **Rooming lists and air travel.** In the initial planning stages, you need to determine if your firm will be handling all travel arrangements or if each attorney will do their own. VIPs should be identified to the hotel and suites should be made available at the same rate as the other rooms.
5. **Speakers.** As soon as you have a theme, begin looking for your outside presenters. Good speakers are booked six months to a year in advance, so reach out quickly. Have multiple options so you will be able to fill open time slots.

Designing the agenda for a retreat might be the responsibility of a planning committee or a single firm leader. The planner(s) will establish the flow of events, topics of discussion, and presentations. It is their obligation to create an event that embraces the firm's culture, welcomes new attorneys, and offers an environment so everyone feels comfortable during these post-COVID times.

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