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LAW FIRM PARTNERSHIP & BENEFITS REPORT

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Law Firm Retreats

By Sharon Meit Abrahams

In years past, law firm retreats were huge, expensive splashes of luxury and fun for attorneys and often their spouses. It was a way of saying thank you to the attorneys for working hard, and to the spouses for putting up with their absentee partners. Then the economy tanked and many firms could no longer justify or afford such ostentatiousness. In today's economy retreats may still be happening, but many have been tailored down and changed to business meeting formats rather than just R & R. To get the most out of the time and expense investment, proper planning is key.

Why?

To have an jumping-off place, you need to understand the rationale for the retreat. If top management does not have a sound rationale for the retreat, then all the efforts will be misguided and people will not walk away with anything memorable or valuable. Is this a thank-you bash for a year's worth of hard work, or is it a planning session for another successful year? Is this retreat an opportunity for people who don't know each other to meet, or for old friends to sit around and tell stories from the past?

If the firm has recently had a growth spurt, then the retreat should be geared toward meeting each other and establishing working relationships. Activities should be conducted that will integrate new and old attorneys.

Where?

Location can drive many aspects of the planning. The facility you choose should fit your basic criteria for size, food service and activity. The size of the facility is important to insure 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 that they could attend. Are there enough rooms of relatively same quality?

Size also means looking at meeting space if the retreat has a business theme. Is the ballroom big enough for a theater-style or classroom-style setup? Are there enough smaller "break-out" rooms if groups need to have private meetings? All facilities can send you floor plans and property maps so you can look at the overall layout.

The size of a facility will also influence the food service available at the property. Large properties usually have full-service dining facilities, while smaller places may only provide breakfast or lunch.

The location you choose will lend itself to the overall success for your retreat. If the property is attractive, the staff helpful and the accommodations comfortable, the retreat will be enjoyable.

What?

Planning what to do at a retreat is where all the creativity and fun comes into place. If the retreat is purely social, then activities geared around “getting to know you” can be fun. Team activities that mix up people from different departments or offices allow people 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 the program. The agenda can have multiple topics or one theme addressed in a variety of ways. Think about times of day to best deliver a particular topic. For example, addressing firm finances right after lunch would cause the audience to take an early siesta. That time should be reserved for topics that include interaction among the participants, or that will get people excited and involved.

When?

The timing of a retreat is important to maximize attendance. If you have a particular cycle of billing or collecting fees, then a retreat bumped up to this time frame would crunch the attorneys and many 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 audience you want. Family celebrations that would draw people away might impact who will attend the retreat as well.

A retreat planned just after the first of the year would be good timing to celebrate a successful prior year. A retreat planned for the fall would be good for strategic planning, budgeting and goal-setting for the next year. You cannot expect 100% attendance at any event, so plan around the most important people's calendar.

Who?

If a firm is small and manageable in size, the “who should be invited?” question might not be as overwhelming. But if your firm has over 200 lawyers, 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 getaway 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 you are deciding who should attend, rest assured that someone will be unhappy, especially if this year's roster will be different from previous years. In time, everyone will forget the parties of the past and accept what's offered currently.

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 have to happen before you can even start your timeline. First you have to have the location and the date. Once these two things are chosen, you can start.

Theme

All good parties have a theme and let's face it, a purely social retreat is a weekend-long party. Themes can coincide with the facility. Even if the retreat is business-oriented, there should still be a theme. The theme, however, 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 to the participants. Gifts and take-aways should carry the theme as well.

Contracts

The first step is to secure your facility. Look for hidden costs like housekeeping and bellman charges, or meeting-room fees. Negotiate everything on the contract and ask for everything you need to be included. For example, if you are serving meals at the hotel, you should not pay for room fees. If you are buying all the liquor from the hotel, ask for the bartender fees to be waived. If you plan a meal to be served outside, be sure there is backup space inside in case of inclement weather. Try to plan for all possible eventuality and place it in the contract.

To ease the billing process, request a master account detailing what charges can be placed on the master account and which charges should be considered incidentals. If you are at a resort that offers golf and tennis, these charges should be on the master account because these activities should be previously arranged. However, if the resort offers spa facilities, the guests should be made aware what services will or will not be covered and those not covered should be billed to the individual's room.

Another area to look into is conference staff. Will you need to have separate contract arrangements for audiovisuals, business center facilities or recreational personnel? Be sure to review these contracts as thoroughly as you do the facility one.

Invitations

Once you have a theme, the dates and the location, you can do the invitations. Use your creativity and produce something that reflects the culture of the firm and the attitude set for the retreat. There are multiple choices in software that can be used to send electronic invitations, collect RSVPs and send follow-up communications. As with all important events, the invitations should go out at least six to eight weeks in advance of the retreat.

Critical information in the invitation should include dates, times, location, directions and a full agenda of events. Information that is nice to include is dress code, special sites worth seeing in the area and a picture of the facility. The invitation will set the mood for the retreat and therefore should be well thought out.

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. Depending on how many people will be coming to the location via air, you can make special arrangements with some airlines. Another cost to check out is whether an airport shuttle is available.

When the invitations are sent, a central person can begin to compile a rooming list. For control of the group, you should have the attorneys respond electronically so you can capture their data. This will help you project other costs like food and transportation. VIPs should be identified to the hotel and suites should be made available at the same rate as the other rooms.

Details

At this point in the planning process, you are down to the details. You need to begin planning locations for meals, choosing menus, hiring speakers, working on agendas and covering all the minor details

that make a weekend superb. With a timelined agenda, you can see the flow of presentations, activities and meals.

Be sure to do a post-retreat survey to see what the attorneys liked and disliked about the programming, the facility and the food. Your attorneys should walk away from your firm's retreat feeling, "This was a good use of my time."

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