

# THE AMERICAN LAWYER

## MEETINGS & RETREATS

*Law firms are finally catching on to what corporations and government institutions have known for a long time: Retreats are a valuable management tool that can be tailored to meet specific needs.*

*In this management report, Bradford Hildebrandt and Donald Akins of Hildebrandt, Inc., offer three case studies of retreats targeting distinct management, growth, and strategic planning problems, and Susan Saltonstall of Saltonstall & Associates details how to make sure the event goes smoothly.*

## RETREAT PLANNING CHECKLIST

BY SUSAN SALTONSTALL

**A partners-only event may be appropriate for the firm's first retreat or for a firm so large that an all-lawyer meeting would prove too costly.**

**T**he following tips will help to make the retreat planning process simple and the event a success.

### SIX TO TWELVE MONTHS AHEAD

Once senior management has committed to a retreat and has defined its objectives, it should:

- Determine who will participate. A partners-only event may be appropriate when it is the firm's first retreat or when the firm is so large that an all-lawyer meeting becomes too costly. In other cases, not only associates but also senior paralegals often can be assets to the retreat, especially those who have developed expertise in particular areas. Administrators are often overlooked, but it is difficult to develop strategic or marketing plans without their participation. Whether spouses are invited will depend on the goals of the retreat and on cost. Whatever the decision about whom to include, publish it early.

- Select a theme. To avoid trying to accomplish too much, the retreat should focus on one major topic (marketing, client

development, strategic planning).

- Specify a budget. Management should define a range within which a retreat committee can work. Spending approximately \$500 to \$800 per lawyer on a retreat is not unusual.

- Choose a retreat task force. Designating a task force to plan the retreat frees an already burdened management committee from the day-to-day administration. The task force for one 200-lawyer firm, for example, included one member of the management committee, the director of administration, a representative mix of four partners and two associates, and other appropriate administrators (marketing director, recruitment coordinator).

- Select a retreat leader. This person must be politically unbiased and have management endorsement and credibility. At partner retreats the firm is often wise to hire a consultant as the facilitator or co-leader. (Appointing a retreat leader may also be left to the task force.)

### FOUR TO SIX MONTHS AHEAD

The task force should:

- Solicit input. The retreat committee should circulate a memorandum stating the objectives and theme for the retreat.

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All attorneys and appropriate administrators should be invited to suggest topics, formats, dates, and locations.

- Review suggestions and narrow the topics.

- Identify speakers and facilitators. If a consultant will be used, he or she should be involved in the planning at this point. Guest speakers should be contacted as early as possible to assure their availability.

- Establish a retreat format.

- Determine length and days of week. To avoid tying up too much billable time, retreats are usually held at the end of a week and over part of the weekend. In general, we recommend that Friday all day and Saturday until 2 P.M. be working days. Socializing is best reserved for Friday evening, Saturday afternoon and evening, and possibly Sunday. (Many will want to use Sunday as a travel day.)

- Plan recreation and social activities.

- Design programs for spouses. If husbands and wives are included, the task force should plan an optional schedule for them. The program might include presentations on stress, time management, financial planning, or the role of spouses in the firm's business development efforts. Spouses can be made to feel a part of the retreat if they are sent a separate invitation with a schedule of activities, a map of the city, and a list of historical sites and recreational facilities.

- Select a location and retreat center. The usual options include:

*Hotels in the firm's home city.* The advantages are economy and convenience. The major disadvantage is that lawyers may be tempted to run back to the office or skip the evening events to go home.

*Full-service suburban conference centers.* Designed with the corporate retreat in mind, these centers usually have abundant meeting rooms, overnight accommodations, and recreational facilities. Most have office equipment and services (duplicating, telecopying, secretarial assistance, extra telephones) as well as audiovisual equipment and a supervisor. A center within two to three hours' drive of the home office is an ideal retreat location.

*Resorts.* While resorts offer an idyllic location, here are a few caveats.

Be sure the facilities have an adequate number of flexibly arranged meeting rooms. A group of 200 participants could require as many as ten to fifteen breakout rooms.

Be sure the resort is easily accessible by air. For insurance reasons, no more than ten partners should fly on the same plane in the event of an accident. Some resorts are not serviced by many airlines, and it may be difficult to get enough flights within a reasonable time frame.

Try to plan your retreat in the off-season when rates can be cut in half. Room rates, meals, and a few free rooms or a hospitality

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## Six to twelve months before the retreat, the management committee should specify a budget. Spending \$500 to \$800 per lawyer is not unusual.

suite can usually be negotiated. Drive a hard bargain, especially if you have a group of more than 100.

- Determine the dates. Planning a retreat shortly after the close of the fiscal year has allowed firms to review financial and other management data. The new requirement that a firm's financial year end with the calendar year makes this retreat schedule less appealing since the first four months of the year are peak season at many resorts as well as the time for ABA section meetings. Now partners may prefer to time the retreat according to mid-year or other financial information.

### TWO TO FOUR MONTHS AHEAD

At this point the task force should finalize the details on the above checklist.

### TWO TO SIX WEEKS AHEAD

- Confirm numbers, dates, logistics. Send a questionnaire to all participants concerning travel plans, recreational selections, and meal preferences. Retreat centers usually require a final room count several weeks prior to the event and a meal count two to four days in advance. Your travel agent can obtain the best fares and schedules with 30-day advance bookings.

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## At the end of the event, participants should be asked to comment on the retreat, the effectiveness of the sessions, and ideas for follow-up.

- Compile handout materials. Distribute the agenda, a list of conference facilities, maps of the local area and facilities, the names of participants and spouses, biographies of speakers, client and financial data, and an evaluation form for follow-up.

- Meet with on-site staff. A week or two before the retreat, meet with your contacts at the facility to walk through the agenda and catch any details that you may have missed.

- Prepare in-house staff. There are bound to be unanticipated problems, and someone must be available to greet consultants and speakers, adjust the heat or air conditioning, and refill coffee urns. For this reason, a few individuals not attending the sessions should be asked to staff the retreat, at least during the arrival times and working sessions.

### AFTERMATH

Before leaving the retreat, all participants should complete a questionnaire on whether the retreat achieved its goals, how effective each session was, how attractive and conducive the facility was, and what they might suggest for follow-up programs and action.

### ONE TO TWO MONTHS AFTER

The task force should review the questionnaires, evaluate the costs, and submit a report to the management committee with an executive summary and recommendations for future retreats. Last and most importantly, the actions that were agreed upon, along with any proposals for next year's event, should be distributed to all retreat participants. □