



Retreat!

Planning and executing an effective firm retreat



Cooper

BY MILES B. COOPER

The lawyers sat on the porch talking, the Golden Gate bridge in the distance. It was hard to imagine a place so quiet existed just across the bay. As they talked, their phones silenced, they were able to work through significant issues with a focus that rarely existed during the normal workday.

It's a very, very mad world

Retreats, done well, allow folks to disengage from the practice's day-to-day hullabaloo. That disengagement brings quiet, clarity, and focus, and an opportunity to shape the future. Retreats succeed with significant pre-retreat preparation. Deciding upon the retreat's focus, attendees, and the where, when, and agenda are key steps. Don't limit retreats to firm operations, either. Retreats can be for anything, including case-strategy sessions.

Focus, who, where, and when

Broadly speaking, the retreat's focus defines everything else. Scheduled annual retreats can feel obligatory without there being a reason. So, what's the theme? Reconnecting? Some big issue? Annual planning? Once a theme is decided upon, deciding the who becomes easier. For a trial, it would involve the trial team. For firm direction, it likely involves firm leadership. Next, comes where. Even if it is a one-day, it should be offsite. Attempting a retreat within the firm space is like a drunk trying to sober up in a bar – too many distractions as well as the ability for others to interrupt the process. It doesn't need to be far away, but it should be quiet, with open spaces for people to drift about between sessions. For us, based in San Francisco, simply crossing a bridge provides a wealth of options.

Finally, there's the when. Between trial calendars, other work, and family obligations, selecting the when can be one of the hardest pieces. We find it takes about two months' advance planning to coordinate calendars with openings at a preferred location. Get buy-in on the retreat's importance. Once set, it proceeds. Other matters don't get simultaneous booking – not the hard-to-book expert or mediator. For that time block, the retreat is center stage.

Agenda and ground rules

While many people may weigh in, one person should "own" the retreat. This means making sure the location has been booked, the dates blocked out on calendar, and an agenda agreed to. With the agenda, less is more. Because retreats tend to be infrequent events with the press of day-to-day litigation, there's a tendency to want to book every second of the day. Resist this temptation. Few things, done well, will garner more change than flurried activity. Consider breaking the day into two morning 1.5-hour blocks separated by 15-30-minute sessions to allow people

to decompress, with the same setup in the afternoon. Will people use the breaks to check messages and respond to people? Probably. Better to have scheduled time for this than folks surreptitiously looking at their phones.

This brings us to ground rules. Consider a radical proposition – no devices during sessions, including laptops or tablets. Phones out of the room or on airplane mode. This will generally garner protest. The temptation to check email or do "just this little thing," is too great. Notepads and whiteboards should be the retreat's tools. If the agenda is important enough to get everyone meeting off site, everything else can wait for a break.

Within the agenda, consider whether topics or subtopics are ripe for walking meetings. Conversations in motion tap into different parts of the brain and are particularly good for the fidgety folks. These sessions are well-suited to smaller groups or breakout sessions. Walking, here, means a meander around the grounds, not necessarily a hard charge to the top of the nearest mountain.

Have fun, and that's an order!

Proactively build time to reconnect, for this can be one of the most important aspects of a retreat. That can be lunch breaks, dinner breaks, organized social events, or unscripted time together. We chose to work together for a reason, and we work best and have each other's backs when we're in step with each other. This is even more important with more people working remotely these days, leading to less day-to-day interaction. When planning social aspects, take the group into account. Acrophobics may not enjoy group hang gliding, arachnophobics may not enjoy a spider petting zoo, and alcoholics may not enjoy wine tasting (or may enjoy it too much).

Follow-through and messaging

As retreat sessions occur, make sure the executables get tracked and that there's follow-through back at the office. Likewise, to the extent any significant decisions get made, make sure the decisions are shared in cascading messages to the rest of the firm. For a firm to remain unified, communication is key.

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Back to our lawyers. They finished their meeting on the porch, made notes about the to-do's that needed to occur following their conversation, and took a breather to check messages. They had gotten through so much, and still much remained. All would be done, all in good time.

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