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The Show Must (Remotely) Go On: Transitioning from Live to Virtual Retreats



The word of the day is “disruption.”

This pandemic has unleashed seismic ripples that have created a new world of lawyers and staff working from home, trials over Zoom and client industries being thrown into flux.

Which means we must adapt. However, as a profession, we generally like change as much as children like taking medicine, so we are faced with a decision. We can ride it out and hope everything settles back the way things were before the pandemic, or we can step up and prepare for a very different future.

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This article is for those firms that choose to be proactive. Firms that realize they must, as the saying goes, “listen to the whispers before they turn into screams.” Whispers that say change has radically accelerated, so we must meet, assess our current situation, anticipate the future and make plans to put ourselves in a position to win.

THE VIRTUAL PLANNING RETREAT

In pre-pandemic times, we often brought our lawyers together in a nice resort to listen to a report on the state of the firm, conduct presentations, discuss issues, provide a little training and engage in collegial social-bonding time.

While many firms have understandably canceled their retreats due to the pandemic, they should be careful not to lose this valuable event. Just because our go-to method of gathering in-person has been taken away does not eliminate the need to meet. In fact, given the intensity of our times, it has never been more important to come together to make smart decisions and move into action. It is also vital to collaborate and continue to build professional relationships with our colleagues.

Which means we must shift our mode of connecting from being in the room, to being on Zoom. When properly designed and delivered, remote meetings and retreats have the potential to yield better outcomes than typical

daylong or weekend gatherings. Virtual meetings can be more efficient, they can save a tremendous amount of lawyer time, they cost a fraction of the overall expense, they can be crafted to create solid connections, and they can be launching pads for action. The following are some key elements to consider when making the transformation from in-person to in-Zoom.

WHO SHOULD MEET, AND WHY?

The short answer is everyone. Practice groups, departments, offices, industry teams and client teams are disrupted. Associates are disrupted; staff is disrupted; your leadership team is disrupted. And of course, your clients are disrupted. They all need to figure out how to work together to move forward in this new environment. Some topics for discussion could include:

- **For all lawyers:** How to adapt to the transformations in the marketplace to maintain and grow revenue.
- **For leadership teams:** How to execute their role as leaders to help lawyers adapt and grow revenue.
- **For cross-practice groups and departments:** How to cross-sell more work to existing clients.
- **Within practice groups and industry teams:** How to hunt as a pack to gain more market share or to transition if negatively impacted by the pandemic.
- **For professionals and staff:** How to support lawyers and each other to be more efficient and effective in this remote environment.
- **With clients:** How to deepen the relationship, develop plans to become more efficient, and find opportunities to serve more of their needs.

DESIGNING AND DELIVERING GREAT VIRTUAL MEETINGS

One of the biggest challenges adapting to a virtual environment is to deliver programs that create high levels of engagement. One way to add some va-va-voom to your Zoom is by taking production values up to the next level.

Ken Sky, a Virtual Experience Producer who specializes in making virtual meetings look and feel more like entertaining television productions, says it starts with the fundamentals. “At the basic level, make sure your participants know the proper etiquette for being on virtual meetings. Simple but important elements include having their camera on, setting it at a proper angle, looking directly into the camera as much as possible, using supportive lighting, having good sound and not messing with your hair or clothing,” he says. (For more information on proper remote meeting etiquette, [click here](#) for his guide.)

From there, Sky says you can use advanced technology to make the presentations look more professional. “If you envision the production values on your major news shows, that can be done over Zoom to make your sessions pop and increase audience engagement. Imagine having multiple presenters on a screen as if you were running a panel discussion or having split screens with a presenter off to a side, while their PowerPoint slides play next to them, or videos interspersed with other content. All of this is possible to make meetings much more interesting and entertaining.”

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Patricia Olejnik, Associate Director of Experience Planning & Design for ALA has additional suggestions, particularly if you don't want to spend a lot on production. "Keep things familiar. Make it casual Friday attire for speakers and attendees, show the presenters in their living rooms or home offices, create a theme for participation (like favorite sports team or funky hats). End the day with a happy hour (bring your own beverage, of course) where 25 or so can see each other, share fun summer stories and cheer to virtual engagement. The options are endless."

In the hands of an experienced meeting designer and facilitator, virtual retreats have additional technology advantages that can increase participation to levels beyond what is typically seen in live events. For example, polls can be launched to get immediate audience feedback. Chat boxes can be used to generate participant questions and to receive input during brainstorming sessions. Virtual breakout rooms can target specific subgroups to deepen relationships, allow for peer coaching, generate higher engagement and facilitate commitments for action. White boards can be used to capture input received during group discussions. All of these can generate a record of ideas, actions and commitments that can be used to track progress and hold people accountable for follow up action.

TAKE ADVANTAGE OF THE MOMENT

There IS a silver lining within this pandemic. This crisis has created the potential to bring firms — and their clients — closer in new and different ways. Lawyers have been forced to be more open to change, and they need a forum where they can connect, learn from each other, and collaborate to move forward. Rather than retreating from conducting your retreats, access this unique opportunity by using remote meeting technology to advance into the future.

About the Author

David H. Freeman, JD, is an award-winning consultant and two-time bestselling author who has trained and coached thousands of lawyers and leaders in 200 law firms worldwide. He was inducted into the *National Law Journal* Hall of Fame for being voted the No. 1 business development consultant and coach for three consecutive years, and he has written and contributed to 13 books on law firm business development and leadership. He also has significant expertise designing and running remote training sessions and virtual retreats and has found that well-crafted initiatives can be more focused, more engaging, and can launch more people into action than typical live events.