



## As Law Firm Retreats Go Virtual, Here's How to Keep them Effective

Losing the ability to meet in person doesn't mean firms must lose the ability to bring their people together.

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Law Firm Management

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In many firms, the main differentiator is culture, which is built and sustained through the ongoing interactions of a firm's people. Having been locked down for over a year, those interactions have been radically disrupted, which means firms must find ways to foster connection, to plan, to educate and to inspire.

Retreats have been a go-to vehicle for reinforcing firm culture, which in today's environment means either being fully virtual or utilizing a hybrid approach. In a world of Zoom fatigue, many firms are wrestling with how to make these events as engaging and productive as possible.

The good news is that over the past year many firms have designed remote meetings in ways that can be as good as, if not better than, their live counterparts. When thoughtfully crafted and expertly executed, virtual meetings can be more efficient, can reduce lost billable time, cost a fraction of the overall expense, can create targeted interpersonal connections, and 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. Every sector of a firm has been rocked in one way or another, so bringing various groups together to address their biggest issues and pursue their best opportunities is essential. As an example, 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 "sales managers" 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 new 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 High-Impact Virtual Events**

The most important part of creating your event is to make it highly engaging. As we mature in our use of platforms like Zoom, approaches have been developed that utilize technology more effectively, both from a technology and meeting design perspective. The following are examples of ways firms have adapted to create successful events.

**Venable** shared how it leaned into the virtual world at the firm's most recent retreat. Last fall, after canceling its in-person partner retreat, the firm quickly pivoted to the virtual. It took the opportunity to create a full Retreat Week, with forward-looking sessions for partners, counsel, associates, and all business professionals. Throughout the week there was substantive programming on the pandemic and its impact moving forward; diversity, equity and inclusion; and client service post-COVID-19. There were also numerous social events aimed at supporting intra-firm relationship building: a week-long virtual 5K race, several days that started off with virtual coffee klatches, and evenings that ended with social activities where small local businesses were tapped to offer virtual wine and whiskey tastings as well as family-friendly Japanese-style mochi ice cream tasting and an interactive cooking experience. Retreat Week committee co-chair Danielle Foley shared her observations: "We hit our goals of providing the right amount of virtual programming and

social activities. Attendance exceeded our expectations, and our colleagues gave Retreat Week top marks in our post-event survey.”

Annie Saleh, marketing manager at **Hedrick Gardner Kincheloe & Garofalo**, worked on their virtual retreat in 2020, and the feedback was extremely positive. They brought in speakers who talked about how to transform the stress of the pandemic into personal growth, which was very well-received. They also hired a company to design and run a trivia game/happy hour including a round of questions focused on firm trivia. Virtual teams were created and placed into breakout rooms and the associate that most recently joined the firm on each team was named as the captain (which increased their engagement in the process). Saleh reported that in many ways, using a virtual platform created more engagement than their typical live events.

For an upcoming retreat, Saleh was searching for ways to finesse the hybrid model, especially for team-building exercises. During our conversation we came up with an approach where the “live” people can meet and engage through lunch and attend a presentation that the virtual attendees would view via a webcast, and in the afternoon the full group can participate virtually in a team-building exercise.

Ken Sky, founder of Ken Sky Unlimited, is a virtual experience producer who specializes in making virtual meetings look and feel more like entertaining television productions. He said it starts with the fundamentals. “At the basic level, make sure your participants know the proper etiquette for being on virtual meetings, like 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 hair or clothing. You can also make your overall production

values look like television news shows in order to increase audience engagement,” he said. “You can have multiple presenters on a screen as if you were running a panel discussion, you can show split screens with a presenter off to a side while their PowerPoint slides play next to them, or show videos interspersed with other content. All of this is possible to make meetings much more interesting and entertaining.”

Steve Boutwell, chief operating officer at **Kean Miller**, shared an approach with me that his firm used in live retreats that I feel would work very well in the short-attention-span virtual world. The firm featured TED Talk-style committee reports to the partnership that were limited to six minutes (with a countdown timer to make sure people stayed on schedule).

Stewart Levine, founder of ResolutionWorks, said, “Anything you can do in person you can do online. It’s all about detailed planning. Have lots of breakout groups with engaging questions and exercises, have a clear goal-oriented agenda, provide good takeaways and get the group to agree on actions they will take from the event.”

James Perkins, chief operating officer at **Procopio**, shared that while his firm has postponed its all-attorney retreat until 2022, it has substituted more practice team and practice group virtual meetings. “We were keeping our regular meeting schedule, but knew we had to enhance communication during COVID. We increased cross-group discussions, and we plan to keep this going no matter how things shake out in the future. We also found that we were able to reach a wider audience with our webinars—live events that would attract 200 to 250 attendees now had over 500 to 1,000 people participating virtually. We ran triple the number of webinars, and as a side benefit became much more polished

at delivering virtual events. We're even building small video labs in our offices so our lawyers can present themselves more professionally. From an ROI perspective, we had record fee revenue in 2020 and the best second-six-month period in firm history."

Larry Richard, founder of LawyerBrain, noted that the pandemic and working remotely have caused people to be more stressed and distracted. To address the disruption to the social connections that normally exist, he likes to "design sessions to include more personal interaction time among the participants. Hybrid meetings are the hardest because those online can easily feel left out. Plus, those in the room have two different sources of input to pay attention to—live and online. That adds stress. Consequently, I build in more and longer breaks, and encourage interaction during the breaks. Also, I design activities that allow participants to 'hunt for the positive'—we naturally focus on the negative (What's wrong? What could go wrong?), and that tendency is exacerbated in the current situation, so one antidote is to have participants spend time cataloguing what's working well, what are they proud of, pleased with, etc."

A former group leader in an Am Law 100 firm reported they have quarterly partner meetings, and in one they had partners create videos where they creatively delivered information they wanted others to know. Some used friends who are celebrities to deliver the messages, others did parodies of famous TV shows. He also mentioned the importance of using a lot of visuals on the screen to keep viewers engaged.

Alexandra DeFelice, director of marketing and business development at **Payne & Fears**, told me "people miss the fun part of work. During an

all-firm virtual meeting, we had the usual announcements, but we added an element of fun. While it wasn't Halloween or any special occasion, the meeting that resulted in the most attendance was one in which we announced a costume contest. It was an excellent event, and we received tons of positive feedback."

Sheenika Gandhi, director of marketing at **Greenberg Glusker**, reported that "we recently hosted a virtual leadership retreat at the firm in March. The purpose was to bring together the heads of each committee (a committee of committees!) to discuss what their committee does, discuss two to three goals for the year and how they will accomplish them, and name one to two other committees they would like to collaborate with this year. It allowed the firm to increase transparency on what each committee was working on. On an engagement level, we did a few things. First, in the sign-up form, we asked each committee leader to provide the firm's strengths, weaknesses, opportunities and threats (SWOT analysis) and provided everyone a summary of the responses prior to the meeting so they could align their goals on this feedback. Second, we collected their favorite snack or candy and assembled 'mystery boxes' so that each of them could enjoy their colleagues' favorite snacks. During the meeting, we played music from our internally famous 'GG Good Mood Playlist' and had a short breakout room (randomized) to provide an opportunity to connect with other attorneys. I had one of my team members take notes throughout the two-hour retreat and we are now working on action items to bring various committees together to break down the silos that often exist within a law firm."

Marisa Eubanks, director of marketing at **Rumberger, Kirk & Caldwell**, shared an approach the firm used during an in-person meeting that can

be adapted to work virtually: “We have done games/puzzles in the past in which we put together the teams with members cross-offices. I’ve done Survivor, Family Feud and during our retreat in 2018 we did fun facts. I spent months gathering information about each attorney and put them into teams. I would call up four attorneys to the stage holding posters with their names, then I would read out loud some fun facts and each team had to guess which attorney each set of facts belonged to (this can be done virtually in the chat box). It was a great way to get to know people on a more personal level, and many lawyers had things in common they would have never known but engaging in this exercise.”

These examples demonstrate one common fact: Losing the ability to meet in person doesn’t mean we lose our ability to create great events. In fact, some virtual programs can outperform their live counterparts. Through thoughtful design and professional delivery, you can enhance your culture by creating high-impact virtual programs that foster connection, planning, education, inspiration and action.

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