

Sweet Legal Retreats

The best sort of law department getaway combines a load of fun with important work lessons. Murder mystery, anyone?

BY REES W. MORRISON

What do in-house lawyers really like about their law department retreats? A 90-minute lecture, with 68 slides, updating lawyers on proposed regulations under Section 404(c) of Sarbanes-Oxley? Absolutely. But mostly during the day or two that they spend away from the office every year, together and focused as a department, they crave the memorable event. The evening activities can convert a working retreat into a legendary memory. While retreats can and should be fun, they can also teach some good lessons at the same time.

The substantive legal content of the retreat may appeal to the left brain, but the right brain revels in the splashy event. Here are 10 retreats I especially enjoyed. I took part in these retreats as a consultant, always giving a presentation, and sometimes helping to plan the retreat, as well. Each of these memorable moments contains a lesson or two about how to conduct a successful retreat.

MEDIEVAL DINNER

A global bank convened all of its lawyers in Frankfurt, Germany. The second night, we took buses to Ronneburg Castle, a 14th-century restored fortress. Inside the guest hall of the 600-year-old castle we ate dinner. But we didn't just dine. The Ronneburg staff recreated a royal meal from the early years of the castle, complete with one eating spoon per person, thick mead, crude wood bowls, honey in pots, chunks of coarse bread, cold stone floors, and no salt. Courtiers dressed in 14th-century garb sang lyrics accompanied by lutes. All we missed were dogs scrapping for bones and wise jesters.

Lesson: Respect the traditions of the department. Retreats provide excellent opportunities to reflect on the successes, changes, and turmoils of the department over the past year. A picture wall, where employees post an old snapshot of themselves, is a fun way to convey the past.

ENGLISH LONGBOWS

A multinational beverage company invited its lawyers and paralegals to Gleneagles, an internationally acclaimed golf resort amid the heath outside Glasgow, Scotland. The highlight for me, aside from the scotch tasting and the traditional Scottish fare (got haggis, anyone?), was a session with an English longbow. Maybe it's a male thing, but slapping on a leather arm protector and thunking an arrow with a 100-pound pull completely through a target makes Agincourt come alive. Watching a senior litigator let fly 250 yards is a thrill!

Lesson: In your retreat planning, aim to give people choices. For those with other interests, there were spas, golf lessons, shopping, scenic treks, skeet shooting, and aged double malts.

SHOOTING WILD BOARS

A paper-products general counsel flew his small law department in the corporate jet—that alone was memorable—to the company's Palmetto Bluff, S.C., lodge. After an evening of Trivial Pursuit, those of us who chose to went wild boar hunting. Now, I am no hunter—in fact, I oppose guns generally—but there I sat at 6 a.m., 10 feet up in a camouflaged hunting blind, clutching a forbiddingly cold shotgun while staring through its sights at six wild boars munching corn, 30 feet away. I pulled the trigger—and have a pig-sticking knife, a gory photograph, and some ambivalence to show for it.

Lesson: Have a target. Pick a key topic, such as substantive expertise or benchmarking numbers or team collegiality, and shoot directly at it. Themes of law department retreats tend to be broad, such as “innovation” or “teamwork.” A third of the retreat should involve clients speaking about what they do and what

they need from the law department. Get the thematic message across with activities, material to be read before the retreat, presentations, and rumination time.

MURDER MYSTERY DINNER

An energy company gathered its 20-plus lawyers at Barnsley Gardens, a golf resort about an hour and a half northwest of Atlanta. The first night, we ate outdoors in a faux ruined castle. Warm, clear skies, a nice buffet—yet tragedy lurked. The meal and conversation were shattered by a murder. The mystery was solved, though, by the time dessert was served. The shenanigans were hilarious, the murderer unsuspected, and the night memorable.

Lesson: Keep it fun. Nothing offs an off-site meeting more than an endless procession of talking heads. About a third of the presentation time should be devoted to updates on the law that pertains to the company. Law firm speakers or speakers from the department can educate the participants on new developments and how to respond. Amid this work, though, inject some break-out sessions, create a mock debate, show videotapes created by the department, enjoy a skit, stick in a “Jeopardy!” event. Do something dramatic to make the messages of the retreat—and the retreat itself—stick in people’s minds.

HISTORICAL DINNERS

A pharmaceutical giant took its lawyers to Washington and hosted the keynote dinner at the elegant Folger Shakespeare Library. High, ornate ceilings; manuscripts and antique books lining the walls; access to an otherwise privileged site; memorabilia of the Bard—all these elements gave the evening vivid panache. Two years later, the same law department of about 50 lawyers met in Philadelphia, where the highlight was dinner at historic Carpenters’ Hall, complete with waiters in period dress, candles on tables, and a string trio playing Colonial-era music in the background.

Lesson: Find ways to help people connect. Everyone likes to eat, and if the ambience is elegant or dramatic, even better. Organize the retreat and its meals to promote collegiality and familiarity among the lawyers who would not otherwise get to know one another. I favor assigning people to specific seats, to encourage mixing. Shy people cling to the people they know, whereas the meat and potatoes of a retreat is getting people in the department to break bread with strangers.

NASA AT CAPE CANAVERAL

A global pharmaceutical company’s law department chose Orlando, Fla., as its lawyer-retreat site. The department took all of us (about 45) to the Kennedy Space Center at Cape Canaveral. Rockets, space suits, historic videos, hearing the words “That’s one small step for man but one giant leap for mankind,” squeezing into an early Apollo nose cone, seeing rocket boosters soaring overhead—all of this made this moment full of the right stuff. Taking part in a shared activity gives colleagues who don’t know one another a common topic to discuss then and for years.

Lesson: Shared activities can lead into talk of the administrative needs of the law department. Not that your retreat will take off into the firmament if you discuss administration, but a third

portion of the retreat should concern some aspect of law department management. All in-house counsel share a support infrastructure, a technology platform, record-management needs, relations with paralegals, management of outside counsel, and other management demands. Another third of the retreat should involve clients speaking about what they do and what they need from the law department. All law departments need to know more about the businesses they support.

SURVIVING THE BOMBS

An international company’s law department wanted to knit together its far-flung lawyers. We designed the retreat as a series of sessions to build teamwork. The attendees, for example, played a version of team trivia at night and did physical activities that called for team coordination.

Each group of about 10 lawyers gathered around a 20-foot-long-by-8-foot-wide rectangle on the ground, divided evenly into 6-by-10 cells. Without speaking a word or writing anything, the group had to figure out a way to guide one of its members through the maze, without him or her blowing up on the squares that were booby-trapped. If a member “exploded,” someone else took the role and the team had to remember and silently point out for the next person the still-deadly bomb squares.

Lesson: Don’t avoid explosive issues. One concerns whether to invite paralegals. It is hard enough to hold everyone’s attention during sessions, and to find common-denominator subjects. If you add paralegals or secretaries, it becomes impossible. In my experience, the hoped-for unity that mixing everyone is supposed to promote does not have that effect.

ANNAPOLIS, MARYLAND

Not all epic retreat events have to be dramatic. The law department of a manufacturing company stayed in a landmark hotel in the heart of charming Annapolis. Old wood floors, immaculate early-1800s décor and feel, quilts and antiques—all made for a wonderful stay.

Lesson: Sleep and aesthetics count for much. Cosmetics and creature comforts are important; natural beauty and drama, exotic locations, and elegant rooms are all part of the sought-for ambience. People won’t be bright-eyed and bushy-tailed at 8 a.m. the second day. If the dinner the night before was any fun at all, give your lawyers a break and save the really important presentations or discussions for the afternoon.

CROQUET TIME

At the close of the first day of a retreat at Nemaconlin Woodlands, outside of Pittsburgh, for the lawyers of a global consumer-products company, the 20 of us repaired before dinner to an elegant, permanent croquet court. This manicured professional court was laid out properly with expert equipment, and we had to play by the official rules. The coed game broke down distinctions of rank and reserve and let everyone take part.

Lesson: Some of the charm of a well-organized retreat is its ability to mix people of all ranks. For this to happen, it takes planning, as do all the other logistics. Getting through the hoops of planning a successful retreat takes a lot of time, and the more

people who are coming and the farther away the retreat, the harder it is to plan. Set up a planning committee and have members of the law department be accountable for different portions of the retreat.

WATCHING A YANKEES GAME

If you like baseball, going to a major-league game would be a single; going to a Yankees game at Yankee Stadium would be a triple; but kicking back in an executive box, as the 15 lawyers of a manufacturer did, launches a grand slam. There was food, air conditioning, cold brew, comfy chairs, and a great view.

Admittedly, there might be the odd soul who doesn't like baseball or the Yankees, but even for him or her the atmosphere was electric and the bar open.

Lesson: For a real hit, choose activities that most people will like. The events described above cost money, including hotel rooms, airfare, and rented buses. Even if you can't pop over to

Germany or go birding in Scotland, you can pick a hot local restaurant or some other offbeat venue. If nothing else, plan a signature moment, such as the retreat where several of the attendees showed funny videos of their offices, or another that used voting pads so people could express their views instantly and anonymously on important as well as humorous topics.

A retreat is enriched if it covers three important topics: information that teaches participants about their company, the laws they need to know, and how the department can work together more efficiently. Law departments that mix the three key substantive parts with a memorable event or two will cherish their retreats.

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