Team Retreat

GET THE MOST OUT OF THE LMA ANNUAL CONFERENCE

*This guide provides a structure for actions to take **before**, **during** and **after** the event for yourself, your organization, and your team to optimize your learning, sharing, networking and overall ROI.*

BEFORE THE CONFERENCE – Plan to Succeed

1. ESTABLISH YOUR GOALS

Anchor your team retreat with goals that are meaningful to the firm/organization, your team, and to yourself for your own personal and professional growth. For example, if you are launching a new BD coaching initiative, your goal might be to meet with certain service providers in the Marketplace, attendee related sessions, and network with peers in similar situations.

Set goals for:

- Yourself
- Your firm/organization
- Your Team (as applicable)

2. HAVE AN ATTENDANCE STRATEGY

Host a meeting with your team where you plan which educational sessions each team member is going to attend. Remember to divide and conquer!

3. SET A NETWORKING PLAN

Determine who you need to talk to at the event to achieve your goals.

- Session Speakers
- Colleagues
- Exhibitor and sponsors
- Consultants and service providers
- Others

4. LAY THE GROUNDWORK

Map out what extra activities and events you and your team will commit to attend e.g.,

- Networking Breaks
- Shared Interest Group (SIG) lunch tables
- Welcome Reception (in the Marketplace)
- Evening Welcome Reception
- Corporate Social Responsibility (CSR) activity in the Marketplace
- Regional activities (if applicable)
- General Sessions (Opening Keynote, General Counsel Panel, Closing Experience)

5. DOWNLOAD THE CONFERENCE APP

- Customize your itinerary with the sessions and events you've committed to attend.
- View the maps, social connections and other attributes of the app so you're familiar with the modules and how they can assist you in getting the most out of the conference.

6. PLAN TO SHARE

Plan how individuals will share key takeaways and concepts with the rest of your team.

- Presentation to the team (e.g., lunch-and-learns)
- Executive summaries with recommendations
- Record takeaways for learning on the go

DURING THE CONFERENCE – Your Strategic Approach

1. TAKE NOTES
For each session, document at least three actions, takeaways, or concepts you want to share and discuss with your team.

2. LEVERAGE SOCIAL MEDIA
Use the conference hashtag to share highlights and learn from others.

3. STAY FOCUSED
Don't get distracted! Reference your conference goals periodically to ensure you are sticking with and achieving your plan.

POST CONFERENCE – Execute On Your Objectives
Don't let your day-to-day get in the way of transforming educational moments into action.

1. USE THE TRIP HOME WISELY
Consider drafting a "Lessons Learned" note to yourself while things are fresh and you're still reflecting.

2. ACTION PLAN
Complete the **Action Plan** template which includes:

- ***One Year Plan*** – what is the plan? What do you want to get accomplished?
- ***Propellers*** – what's needed to move your organization forward?
- ***Hurdles*** – what challenges exist that might get in the way?
- ***Steps*** – what steps need to be taken to get this implemented?
- ***Lead Person*** – who will lead the initiative?
- ***Timeline*** – what are the milestones to get this implemented?

3. MAKE TIME
Block off an hour the week you come back from the conference to debrief, reflect and think strategically.

4. SHARE OUT THE TAKEAWAYS AND LEARNINGS
Seek to generate discussion and further the learning.

- Don't let the ideas, best practices, tips, tricks and winning concepts stay siloes with individuals.
- Schedule or implement the information sharing you decided on in the "Before the Conference" section.
  - » Do you need to schedule the lunch-and-learns with the team? OR
  - » Is there a due date for the Executive Summaries with recommendations or blog post? OR
  - » How else can the learnings be strategically shared with the team for maximum impact?

5. SECOND CHANCE
Identify which **session recordings** you'll want to watch. Conference recordings are included in your conference registration. Alternately, conference recording bundles are available for purchase for those who didn't attend the conference. They are typically available approximately four weeks after the conference.

6. ONE MONTH LATER
Regroup **one month** later.

- Schedule an hour to look back at your notes and Action Plan.
- What did you forget to watch (session recordings), follow up about, start to utilize or integrate into your workflows?
- Stay connected with your new and existing connections from the conference or reach out to the speaker you were interested in hearing more from.

7. THREE MONTHS LATER
Regroup **three months** later.

- How is the team doing? What's worked, what's not?
- Explore feedback from the team.
- What went well, what didn't, what can be added?

Congratulations on extending the value of your learning from the LMA Annual Conference!