

> Planning a Retreat

Planning a retreat is a demanding process: agreeing upon the retreat objectives, choosing a venue, customizing the content for your company, coordinating logistics and travel. More and more often, these responsibilities are being handled by ad hoc committees and busy administrators. While we aren't a meeting planner service, we do have vast experience and contacts from which our clients benefit.

corporateRetreats - How to get the most out of them

When a management team, staff, or executive team holds a corporate retreat or offsite business meeting, the investment of time is significant. The question is how to make the most of this limited and extremely valuable time.

Here are seven suggestions based on over a decade of experience facilitating corporate and executive retreats:

1. Invite the right people...don't use retreats as "rewards" if it excludes key team members.
2. Have clear objectives for the retreat and commit them to a highly focused agenda.
3. Be a good time manager during the retreat...don't let conversations go on tangents...request that small groups take certain topics offline if they don't impact the entire team.
4. Assign homework before the workshop to make the most of your time together.
5. Keep an action list on hand to track commitments, responsible parties and deadlines.
6. Build a post-retreat follow-up into the process...future improvements depend on this.
7. Use a neutral retreat facilitator so that the team members are free to focus on the content of the retreat rather than just the logistics.

A more detailed explanation of each item follows:

If you don't have the right people, then the whole thing will fall apart either during the retreat or, even worse, when you get back to the office. Typically you will want to have an intact management team present at your retreat. If there are other key staff members within the organization with an in-depth knowledge of the issues at hand, or who will be responsible for executing the strategy, consider adding them as well. You may wish to add them for only part of the agenda, or you may wish to get their input either before or after the retreat. Never use a corporate retreat to "reward" someone; this is a time for serious business and should only include the people needed to get the work done.

the rightAgenda...

Agendas that are unfocused, overloaded, and don't have specific outcomes stated are an invitation to failure. These agendas try to cover too much in too little time, with the end result being that nothing gets done properly. The lack of focus makes it all too easy for discussions to get "off-track." Before designing a corporate retreat agenda, be very clear about the following:

"What has to happen for us to consider this session a success?"

"What specific issues do we want to deal with?"

"What tangible things do we want in our hands at the end of each discussion?"

"What is not on the table?"

"If we don't have enough time to cover everything, which things on our list can wait for a future session?"

Here at Meeting Facilitators International, we recently worked with a client who had a very focused agenda with a specific set of outcomes. He wanted to figure out how his company could profitably grow, and he wanted to leave the session with two or three specific actions that could be implemented immediately upon return to the office. As experienced retreat facilitators, we were able to work within this framework to build an agenda for the retreat that explored different avenues to profitable growth, including doing a better job of customer retention, winning orders in head-to-head competition, and entering new markets. The end result was a powerful meeting and a very satisfied client.

the rightProcess...

Sometimes it isn't what you do, but rather how you do it.

For example, many groups will choose to do a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis as part of a strategic planning process. In our experience, if you ask an organization to describe their strengths you will get a predictable list of "generic" strengths with no particular evidence to support them. If, on the other hand, you ask people one at a time to relate a "success story" about a significant accomplishment over the past two to three years and then engage the entire group in identifying the strengths that contributed to this success, you will get a list of specific strengths that can be directly related to the organization.

Perhaps the change is not earth shattering, but the cumulative effect of many similar changes on a corporate retreat can be significant.

We find pre-work to be of tremendous assistance in getting the most out of people's time. We also find that how the pre-work task is defined will have a major effect as to how valuable it is. Asking someone to read a book or article is far more effective if they are also asked to think about what part of it gave them hope or made them worry. Asking them to think about how the author's observations and prescriptions relate to their company will prepare people for a discussion at the corporate retreat of how to apply what they have learned.

Pre-work that involves brainstorming can be particularly effective if the results are collected in advance by phone and tabulated for discussion at the meeting. Having one person collect the results provides a far more usable list than the ones that we typically see if people are asked to "email" their thoughts. The brainstormed list at the meeting can then be used for discussion and priority ranking.

Action planning...

Sometimes clients provide us with the notes from a previous year's retreats. It is amazing to see what is (or rather is not) documented in the action plans. In our opinion, an action plan has to describe who does what by when. Ideally the action is described by the person who is going to be carrying it out. This will always be someone in the room. Finally, the action item has to be "checkable" - that is, it has to be described in such a way that it would be easy for anyone present to "check it off" their "to-do" list and anyone who was affected would know it was done.

A checkable action item that describes who does what by when would be the following:

>> John Smith to prepare a business case for developing a "retail" version of our OEM product - due Oct 2004

Follow-up

Without some form of scheduled follow-up, we find that in spite of the best intentions many action items do not get completed. We encourage clients to define during the corporate retreat the date, time, and location of a follow-up session. This meeting may be specific to the off-site or it may be a simple agreement to put the executive retreat's action items into a regularly scheduled management meeting. (We should note that we also actively encourage people in the retreat to not make commitments around things that are not priorities. It is far better to have a team committed to one or two actions that it successfully completes than it is to have a list of thirty things that never get done.)

Use a meeting facilitator

An independent, neutral retreat facilitator can help you with all of the above, and can help you get the most out of your corporate retreat planning. We find that many of our best clients understand meeting facilitation and have excellent meeting facilitation skills. However, they like to use a neutral outsider because they find it difficult to "wear two hats" and be both a participant and a facilitator.

If you would like to discuss using a facilitator at your next corporate retreat, please give us a call. The initial consultation is always free.

"Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has."