Successful Corporate Retreats

A Quick Start Guide to organizing your next Retreat

A Quick Start Guide

by Dr Andrew O'Brien

Creating Desired Futures

Introduction

Desired Futures Quick Start Guides provide user friendly roadmaps on a range of success critical development activities for business and community organizations.

This Quick Start Guide provides 21 Questions to guide the successful planning of a corporate retreat. This guide is written for retreat sponsors and organizers. It is common for a leader in the host organization to be the sponsor and another member of the entity to organize the details of the retreat.

What is a retreat?

Like many terms used in business there are multiple definitions of a retreat and the key is to define it in a way that works for your organization.

When reading material on retreats be careful of those who prescribe "what to do and not to do" on a retreat as theses prescriptions are dependent on how you define a retreat and what your purpose is.

With more than 20 years as a CEO hosting retreats and with many of those years contributing to other peoples retreats I recognize that a retreat can take may formats. The purpose defines the retreat but with two key characteristics:

- The activity is longer than half a day;
- The agenda is not comprised of day-to-day operational matters that are delay with on a regular basis;
- The purpose is to improve the organization; and,
- The primary purpose is not social, reward or recognition.

Move beyond word games

One of the big challenges in organizational life is what we call moving beyond intellectualizing, a trap that is often used to avoid taking action and being successful.

The label "retreat" is an intellectualizing trap for some and needs to be dealt with quickly. If you find yourself caught in the retreat/advance conversation then you have two practical choices:

1. Accept that by retreating from day-to-day operations you can gather your thoughts and prepare to advance. Use the word retreat.
2. Acknowledge the potential distraction and choose another work. Use "off-site", conference, review, meeting or some other title that works for you.

Focus on a single purpose for your retreat rather than attempting multiple purpose poorly.

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Examples of retreats

Common examples of retreats include:

- Partner or Leadership Retreat
- Board and/or Executive Retreat
- Division or department retreat
- Development or project retreat

Choose A title for your retreat that distinguishes it from day-to-day business activities.

Examples include: Retreat or Conference rather than meeting.

Trying to cover too much is one of the major pitfalls for holding a retreat. We suggest a primary purpose. Examples include:

- Desired Future: Vision and Strategy Retreat;
- Annual Review Strategy and Action Retreat;
- After Action Review: Learning and Improvement Retreat;
- One Big Question: Innovation Retreat;
- Pricing and Value Retreat: Understanding and Implementation Retreat
- Social Media Content Retreat: Focus on content creation project.

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Quick Start Steps

Step 1. Identify the sponsor

Start by identifying the sponsor. This is often the person signing the cheque to organize the retreat. The retreat sponsor can be thought of us the customer however as they are an internal member of the organization most prefer to call them the sponsor.

It helps to differentiate the sponsor from the participants as depending on the purpose of your retreat you may not satisfy the participants but you must focus on keeping the sponsor/customer happy.

It is common for the retreat sponsor to be:

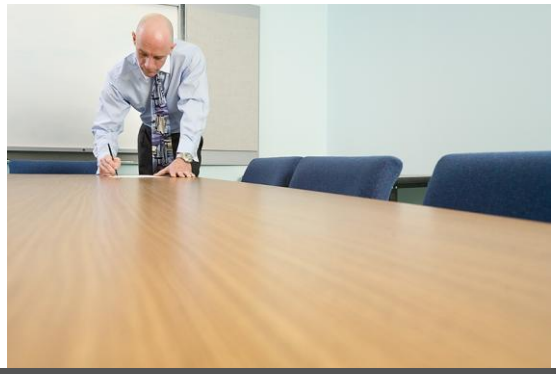
- The President, Chairperson, CEO or Managing Partner
- A Division, Department or Team Leader
- A Project Team Leader

Q1.1. Who is the retreat sponsor?

In most cases the project sponsor is attending the retreat however this is not always the case and needs to be clarified.

Q1.2. Is the retreat sponsor attending the retreat?
Yes or No

Q1.3. If the retreat sponsor is not attending the retreat have they appointed a representative who is, and if so who are they?



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Step 2. Determine the purpose

Being clear on the purpose of the retreat is fundamental to organizing a successful event.

A major problem is to avoid trying to do too much and we strongly advise spending time to be very clear on the purpose. It is better to do one thing well than many poorly. Consider the following list of retreat purpose options.

To Think About: Purpose		
	Purpose	**Examples**
1	**Focus on the future**	***Vision and Strategy development*** • Develop Organization Wide Strategic Plan • Create Team or Division Operating Plan
2	**Understand and educate**	***Learn new skills*** • Discover how to develop unique expertise • Social Media and Community
3	**Develop and create**	***Projects and strategy implementation*** • Develop your pricing strategy and process • Write a series of white papers
4	**Collaborate**	***Team and relationship development*** • Go Further Together Team Building • Seamless Solutions Symposium
5	**Think differently**	***Review, innovate and problem solve*** • After Action Review on Major Project • What if we ....
6	**The Combination**	***A multi-faced event*** • The Annual Organization Conference • Annual, Half Year or Quarterly Review
7	**Reward**	***Recognise and celebrate performance*** • Organization and Life Partners Trip • Customer Golf Weekend

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Did you select Reward?

My apologies but I only included reward on the list to help you identify the true purpose. If you selected reward as the reason for your retreat we strongly suggest you don't call it a retreat and you position it as a different type of exercise. There are two key reasons for this:

1. A retreat is designed as a working get together to improve the organization and it is important to maintain this focus and reinforce this message; and,
2. Due to the work focus of the retreat you want to select the people who need to participate. If reward is a criteria then you send the message that participation to do your job is a reward.

There are many good reasons to organise reward focused events and done well they certainly improve organization performance but please keep them separate to a work focussed retreat.

Q2.1. What is the prime purpose of your retreat?

In addition to the primary purpose you can expect to achieve some secondary purposes and may also break a two day program into more than one section. Complete the following table to identify primary and secondary purposes.

Q2.2. Categorise the prime and secondary purpose of your retreat			
	Purpose	**Primary**	**Secondary**
1.	**Focus on the Future**		
2.	**Understand and Educate**		
3.	**Develop and create**		
4.	**Collaborate**		
5.	**Think Differently**		
6.	**The Combination**		
7.	**Reward**	Don't include this as a retreat.	

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Step 3. Consider Desired Outcomes

No you have identified your purpose write 1 to 5 short sentences to describe the outcomes you want to achieve.

Examples include:

Example A:

1. Prepare the strategic plan for 2012 to 2015.

2. Identify Key Performance Measures for 2012 to 2015.

3. Identify collaboration strategies for implementing the 2012 to 2015 strategic plan.

Example B:

1. Learn about the social media possibilities for our organization.

2. Draft a social media strategy.

3. Prepare an implementation plan for our social media strategy.

4. Allocate content creation tasks to support our social media strategy.

Q3.1 What outcomes will you achieve?
1.
2.
3.
4.
5.

With clarity of purpose it should now be possible to name your retreat. This will help set the scene and engage participants.

Q3.2 What will you call your retreat?

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Step 4. Identify the pool of possible participants

Armed with the purpose and desired outcomes it is time to consider who needs to participate. We suggest you consider the role (and name) with people designated as contributing to pre-work and/or attendance.

Often a retreat will require reports and presentations to be prepared in advance but not everyone who works on pre-work need attend the retreat.

Q4. List the roles of people that could contribute to the retreat?
(Forget personalities at this point - which jobs need to contribute)

Role	Name	Pre-work	Attend

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Step 5. Select a delivery mode

There are two key aspects to consider when looking at the delivery mode and both influence the choice of venue. The two aspects are:

1. The type of activities being undertaken; and,
2. The time required and location desired for the retreat.

The following table will help you identify the types of spaces required. We suggest you wait until you have selected your facilitator before finalizing delivery modes.

Q5.1 What types of spaces do you require?			
	Mode	**Examples of activities**	**Required?**
1	**Presentation**	• Information sharing • Report back from groups	
2	**Conversation**	• Strategy development • Shared understanding • Feedback • Problems solving	
3	**Class room**	• Learning • Project learn and implementation • Skill development	
4	**Break out**	• Strategy development • Shared understanding • Learning	
5	**Open space**	• Strategy development • Learning • Problem solving and innovation	
6	**Specialist**	• E.g. Computer lab • E.g. Outdoor education facilities	
7	**Other**	• What is required?	

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Now complete an estimate as to the location mode and time required.

Q5.2 How much time and what time of location do you need?			
	Option	**Yes?**	**Time Required**
A	Off site and over night for 1, 2, 3 or more nights;		
B	The off site for a day at a time series, e.g. 3 Fridays in a row;		
C	Drive in for the day to a local venue for several days in a row but overnight at home;		
D	Go local by staying in at hotel close to your home office;		
E	Go International for multi-country organizations or for targeted business reasons.		
F	Other - enter your requirement.		

Write a summary of time required and location in the following table. Include any thoughts on location. Examples include travel time, venue type, accommodation and meal requirements.

Q5.3 Summarize the time and location	
Time required:	
Location:	

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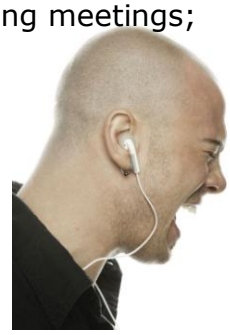
Step 6. Consider relevant organizational values and behaviours

For some reason a retreat can highlight the best and worst of a organization's culture. Whilst this can be a challenge it is a good opportunity to encourage desired behaviour and make it clear as to what is not acceptable.

Some issues which often lead to problems and should be considered early include:

- timeliness of start and finish times;
- use of alcohol;
- listening and open conversation;
- paying attention and use of mobiles phones and ipads during meetings;
- ordering of expensive wines and meals;
- room and seating allocation;
- executive participation;
- hours of work.



In addition to behaviour you choice of venue and services will impact performance. Once again it is personal choice and we recommend one golden rule: **Provide the best you can in order to do the job well, nothing more and nothing less.**

Q6. Can you list any behavioural issues & how to deal with them?

It is worth noting that for behavioural issues where you do not have an organizational nor it is advisable to consider these issues in conjunction with your facilitator.

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Step 7. Specify the desired experience

Imagine you were a participant and asked to write a brief summary of how successful the retreat was. Consider:

- results;
- organization of the retreat;
- sense of community and team work;
- personal learning and enjoyment;
- organization commitment, energy and enthusiasm;
- the challenge ahead; and,
- anything else you think relevant.

Q7.1 Describe the retreat from the perspective of a participant.

-
-
-
-
-

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Step 8 Identify concerns and challenges

Before we move on another issue to consider is the history and challenges associated with organizing a retreat. Whether it be at your organization or at others people often have negative experiences and impressions of what a retreat is all about. To prepare yourself to deal with this we suggest a two-step approach:

- Identify concerns, and,
- Develop strategies to overcome the concerns.

The chances are some people in your organization will be concerned a retreat is nothing but a talk fest. Some retreats are but more often than not people fail to see the connection between the conversation at the retreat and the subsequent action. Two ways of dealing with this include:

Plan explicit action steps in each of your retreat sessions

Report to participants on post retreat progress (see step 21)

The talk fest perception and subsequent waste of time is one challenge but there are others. Has something happened at a previous retreat to make people wary?

- Was there too much social time?
- Were the sessions boring and pointless?
- Were there not enough exercise breaks?
- Did the boss ask for feedback then abuse those who provided it?

By making a list of these types of challenges you can plan to overcome them and work with your facilitator to create a positive experience.

Q8. What challenges must you overcome for a successful retreat?

1.

2.

3.

4.

5.

6.

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Step 9. Decide who must be there

Your retreat may comprise "**must attend**" and "**nice to attend**" participants. It is important to identify these people early as their availability will impact on the schedule. Depending on the lead time this can be a major challenge.

Q9. The following people must attend:

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Step 10. Draft the attendee and presenter list

In addition to your must attend people it is time to prepare your desired guest list and identify possible presenters. (Some will be both attendees and presenters)

Q10. Complete a list of attendees and presenters?			
	Roles of Participants	**Attendee**	**Presenter**
1	**President / Chairperson**		
2	**Board Directors**		
3	**CEO / Managing Partner**		
4	**Executive Committee**		
5	**Partners**		
6	**Team Members**		
7	**Customers**		
8	**Suppliers**		
9	**Experts**		
10	**Participants Life Partners**		
11	**Other**		

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Step 11. Appoint the organiser

This Quick Guide to Successful Corporate Retreats is written for CEOs / Managing Partners and Organization leaders as well as for Retreat Organizers. Chances are if you are reading this guide you will be one or both of these people.

If you are the CEO or Managing Partner or someone with responsibility for leading a retreat now is the time to appoint the retreat organizer. Depending on the size of your organization popular choices for retreat organizers are:

1. Admin team member;
2. People or human resources team member;
3. Conference and event organizer (internal); and,
4. Conference and event organizer (external).

If you are the event organizer then we encourage you to complete this guide and use it to clarify expectations and gain final approval from your retreat sponsor (CEO / Managing Partner or Organization Retreat Leader).

Q11. Who will act as retreat organiser?

Step 12. Determine possible dates

Now is the time to short list the possible dates for the retreat. Ask those who must attend to put dates on hold and move to appoint a facilitator, select and venue and confirm the agenda as quickly as you can.

Q12. List possible dates

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Step 13. Identify sensitive issues

Retreats are valuable for exploring important issues, many of which are avoided during day-to-day business operations. As the retreat organizer it helps to understand both sensitive and no-go issues. This will help you brief the facilitator, set the agenda and ensure the smooth running of the retreat.

Sometimes retreats are used to explore sensitive issues which can be awkward but if well facilitated highly successful. Resolving major problems is one of the benefits of a well run retreat and difficult issues should not be avoided but planned for.

We suggest the organizer works with the sponsor and other key participants to identify sensitive issues. Examples include change programs, unspoken problems, difficult people and criticism of people, especially leaders.

Q13. What sensitive issues must be considered?
i.
ii.
iii.
iv.
v.

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Step 13. Clarify non-go zones

Beyond sensitive issues are no-go zones. These are topics which are not for consideration at the retreat. They may be non-controversial but a distraction and not relevant to the topic at hand. Alternatively they may be super sensitive and the sponsor may make it clear the topic is not up for discussion.

Off topic issues are easy to deal with as you can divert the conversation to a more suitable time and place.

Sensitive no-go topics are more difficult and depend on leadership style. If the topic represents "the elephant in the room" and the leader refuses to discuss it then you need to know this and accept it will impact the effectiveness of the retreat. If on the other hand the leader is open to an open conversation then this can be planned and can have a positive impact on the organization.

Regardless of how you deal with them you must first identify no-go topics. Once you appoint the facilitator they will be skilled in dealing with these issues.

Q13. What no go topics can you identify?

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Step 14. Consult lead facilitator

You are now ready to find your retreat facilitator. The first stage is to talk to potential facilitators and we suggest you consider the following two questions.

Use this stage to see ideas and explore approaches. Both the sponsor and organizer must be comfortable with the facilitator. During initial conversations try and remain open to the possibilities as an expert facilitator may have valuable insights into how you can achieve much more than you realise.

Q14.1 Who will you talk to about facilitating your retreat?

Q14.2 What questions will you ask potential facilitators?

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Step 15. Draft agenda

You know have enough information to prepare a draft agenda. Once available this will help you consult with key participants and for you to appoint a facilitator.

Q15. Outline the draft agenda (by day and by session)

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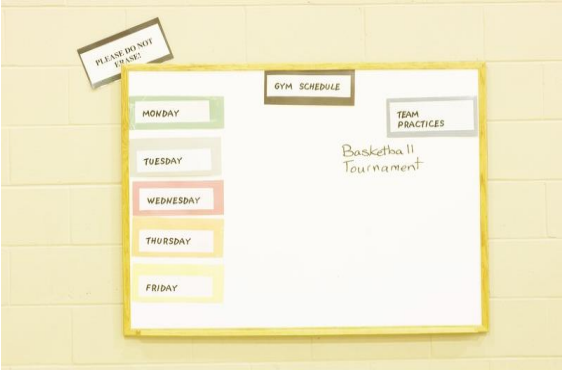
Step 16. Decide when and where

You have now completed the preliminary planning and are ready to decide when and where you will hold your retreat. Engaging a conference venue finding service to find a venue and provide quotes can be an effective way to find a venue and check availability.

Q16 Decide when and where.	
Dates and times:	
Venue:	



Step 17. Appoint lead facilitator

Depending on the purpose of the retreat and what you hope to achieve there are several ways to facilitate the retreat. Common options include:

1. Conference chairperson - normally from within the organization.
2. MC - old school approach to do formal introductions.
3. Trainer - combines educator and time keeper role.
4. Process facilitator - integrates activity and leads process.
5. Theme Weaver - a modern mix of facilitator and MC.

Q17.1 What type of facilitation do you require?

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Q17.2 Who is your lead facilitator?

Before going any further it is helpful to clarify the roles and responsibilities of the facilitator and organizer as this partnership is vital for success.

Q17.3 Clarify tasks between organizer and facilitator	
Organizer	Facilitator
▪ ▪ ▪ ▪ ▪ ▪ ▪	▪ ▪ ▪ ▪ ▪ ▪ ▪

We strongly recommend you use the answer to the above question as the basis of a conversation with the sponsor. At this time it is also good to clarify the role the sponsor will play and the other information outlined in this Quick Start Guide.

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Step 18. Announce the retreat and issue invitations

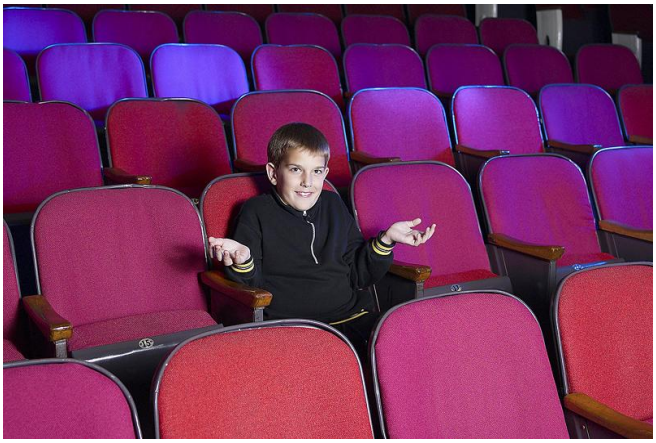
It is time to confirm the retreat is going ahead and to invite participants.

You may wish to consider how you deal with non-participants as some may be unhappy not to be invited.

Q18.1 How will you announce the retreat and issue invitations?

Q18.2 What questions will participants have and how will you answer them?

Q18.3 Do you need a strategy for non-participants?



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Step 19. Confirm agenda and success measures

In step 2 you defined your purpose and in step 7 you outlined the desired experience for the retreat.
You have now planned your agenda, arranged the facilitator and determined the participants. Armed with this information it is time to be specific on how you will measure your success.

Ask yourself how will you know if your purpose has been fulfilled and your desired experience achieved?

Q19. The following measures of success will be used to evaluate our retreat?

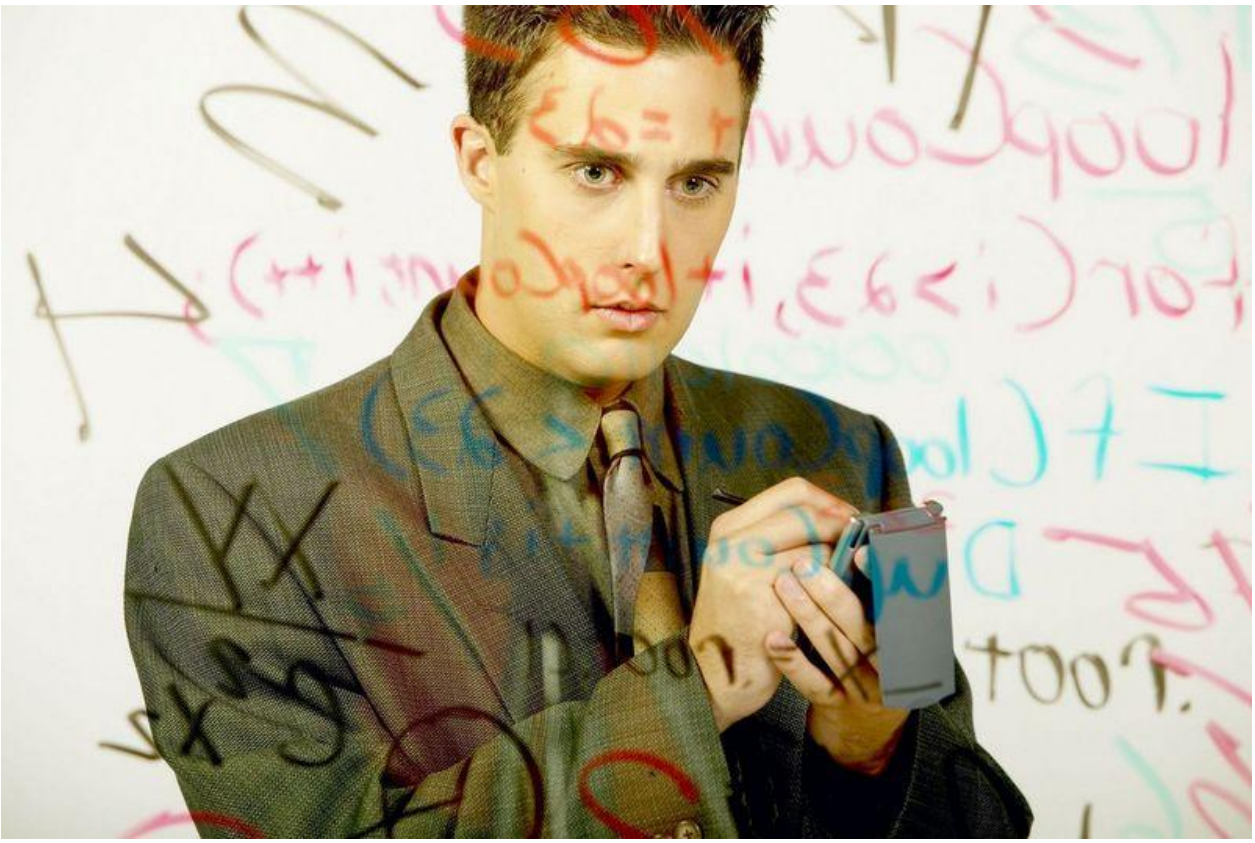
1.

2.

3.

4.

5.



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Step 20. Plan an After Action Review

When done well a retreat is a valuable activity that can be used several times a year. In larger organizations it is possible that one group or another will be using the retreat process every month or maybe more often. For this reason alone it is worth doing it well.

The After Action Review process and it's partner the Before Action Review are great tools for evaluating and improving your retreat. The best After Action Reviews are:

- planned in advance;
- promoted in advance; and,
- designed to collect feedback along the way to assist the review process.

Contact andrew@andrewob.com for more information on these roles. In the mean time here are a few questions to start you on your way to planning your After Action Review.

Q20.1 Who will be involved in your After Action Review?

Q20.2 When will you hold your "Before Action Review"?

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Q20.3 What feedback and input do you need from retreat participants to conduct your outcomes will you achieve?

Q20.4 Are you able to access the information required to evaluate your measures of success?

Q20.5 When will you hold your Action Review?

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Step 21. Gain executive commitment on post retreat follow up

This is the **most important step**. Even if everything else is wonderful if you don't follow up and implement as a result of your retreat it will, at best underperform, and at worst be a waste of time.

Please don't let your retreat be labelled a talk fest. A few suggestions include:

1. Capture the conversation;
2. Involve participants in the After Action Review;
3. Within days of the retreat issue the action plan;
4. Send a two week progress report on actions taken;
5. Send a one month progress report on actions taken;
6. Send monthly reports on actions taken until completed;
7. Prepare a final report on all actions taken; and,
8. In the lead up to your next retreat circulate the previous retreat report of actions taken

Experience has shown participants do not expect 100% of retreat determined actions to implemented. They do expect to be kept informed of progress and told when something cannot be implemented. This said future retreats will benefit if you demonstrate most retreat actions are followed up and implemented.

Q21.1 What is your post-retreat follow up plan?

Q21.2 How will you inform participants of post retreat progress?

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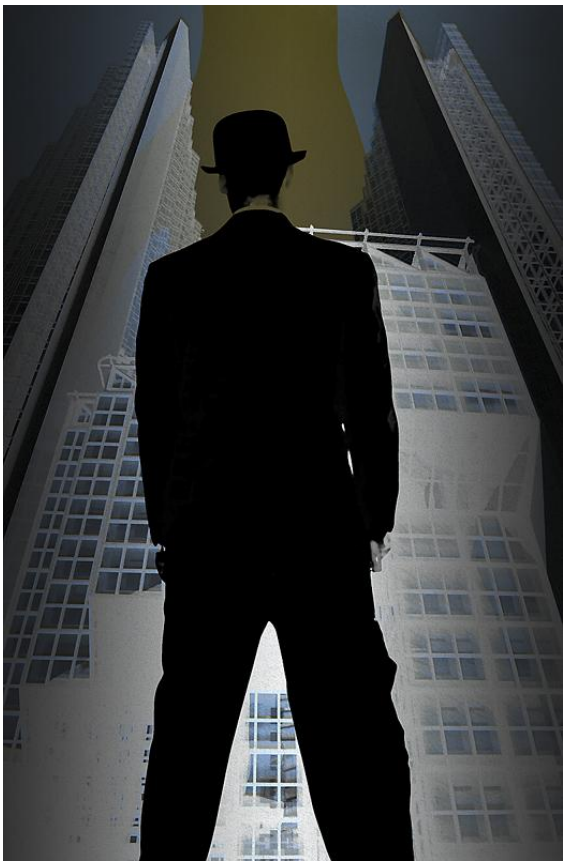
The Final Word

A successful retreat is a powerful activity for improving business performance. There are many ways to make it work and even more to make a mess of it. Plan early and be clear on what you want to achieve. Listen to professional facilitators with experience in achieving business results and don't try and attempt to much. Do something brilliant rather than a few things ordinarily. Harness to knowledge and commitment of the members of your organization.



"Creating the future you want"

Andrew O'Brien, Desired Futures

About Andrew

This guide was written by Dr Andrew O'Brien. Andrew is a former Customer Service Institute of Australia State CEO of the year. An expert in vision and strategy he is a leading facilitator and executive mentor specializing in helping leaders, partners and teams succeed together. More information is available on Andrew on AndrewOB.

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Email: Andrew@andrewob.com to arrange a time and let's make it happen!

Leading Desired Futures

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Contact Details and Online

Dr Andrew O'Brien

The O'Brien Group

Level 1, 181 Bay Street

Brighton

Australia

3186

Email: Andrew@andrewob.com

Skype: couple_on_the_run

Twitter: @Andrew_OB

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