



berkshire corporate *retreats*

Tips for Planning a Corporate Retreat

The best corporate retreats leverage time out of the office to look at challenges and opportunities from a more empowered point of view. They are a great way to open up dialog between team members and build trust and connection. Because distractions are minimized, there is a renewed energy and focus to set new and common company goals, initiate valuable training, and facilitate better communication. Of course, if not planned well, they can also be counter productive for your participants.

Given that off-site meetings typically involve more time and resources than regular team meetings, more thought needs to be put into the preparation. A well-planned meeting can prevent a lot of the pitfalls associated with team retreats.

Here are some tips and a few questions to ask yourself that will ensure your that your time away from the office is a productive and fun experience.

“What is the overall purpose of the meeting?”

Is it to develop a long-term strategy? Improve teamwork? Build Trust? Onboard new team members? Solve a specific problem? A great off-site agenda should be focused and specific to make the most of your group’s time together. It’s an opportunity to take the time needed to strategize, brainstorm, debate, reflect, and learn.

“What are the desired outcomes?”

Desired outcomes are a tangible set of deliverables that you want to achieve by the end of the retreat. i.e.: “A strategic 3-year plan with annual goals”, “A shared vision”, “3 ideas on how we scale for growth” Desired outcomes help you create a focused agenda and provides a way to evaluate the success of the meeting.

“Who should attend?”

As a general rule, those members of the organization who have an interest in and influence over the topics to be discussed should participate. As an example, if your goal is to develop your company’s three-year plan, the senior leadership, including the CEO might attend. If your team needs basic management skills, then anyone who has or will have direct reports, should attend.

“Who are the key stakeholders?”

Stakeholders may or may not be attending the meeting. What would a “win” look like for them? For example, if you can demonstrate how introducing a new product line can increase profitability in the mid to long term, your shareholders may be more enthusiastic about the using the retreat to iron this out.

Tips for Planning a Corporate Retreat, cont'd

"When and how long?"

Set the date!. The more you plan ahead, the better chance you'll have of getting it on everyone's calendar and getting the venue you want.

How many days? This depends on the purpose of the retreat and the material that needs to be covered. However, most retreats have some social time or activities built in.

"What is the theme?"

Select an overall "theme" for the meeting which encompasses the purpose, desired outcomes, and context. Examples of themes are building trust, innovation, change, or playing bigger. Having a central theme allows you to creatively tie all of the meeting elements together: agenda, venue, activities, gift, etc...

"Do I need an outside facilitator/trainer?"

During the retreat the facilitator manages or "facilitates" the group discussion. Facilitators are not generally experts in the specific issue or issues you may be discussing. They are experts in group dynamics, group processes, team building, decision making, and consensus building.

They should have no particular stake or interest in the issues being discussed. Their sole interest is in helping you have a successful retreat. A trainer can also be a facilitator, but will bring an area of expertise and provide education, skill development, and learning.

Find the right venue.

Work with your corporate meeting planner or do your own search to find venues that fit the experience you want to have. For example, do you want rustic with no tvs in the rooms, or do you want a modern inn with all the amenities? Ensure that they cater to company teams and that have the comfort, quality and proximity to activities that you're looking for. It's the tiny details that can make or break an off-site.

Design the agenda.

This is a process where you begin to come up with ways to accomplish the desired outcomes. There could be teambuilding activities, strategy or problem-solving sessions, training, and/or presentations. Pick activities that support your meeting purpose and theme. Take care to include plenty of breaks, personal down-time and social activities.

Assign Pre-work

Is there anything that your participants can do ahead of time to make the time you have together more productive? For example, are there any critical questions you would like to cover during the offsite that you can give them beforehand so they come prepared to discuss them; or is there an assessment that needs to be completed for a communications exercise?

Takeaway gift

Is there some kind of special token that supports the theme and creates a lasting anchor for the experience?



Tips for Planning a Corporate Retreat, cont'd

Here are some things to do during the retreat to ensure the best possible outcome:

Consider the context.

What's going on in the environment that may influence the participant's behavior, mindset, or participation? For example, is there a pending downsizing? A new team member? A restructuring?

Establish Ground Rules.

A facilitator will usually outline the ground rules for group discussion. A typical set of ground rules for a retreat would include:

- * Everyone should participate and express their ideas, questions, and concerns. Success depends on full participation.
- * Participants must practice their active listening skills. Listen for understanding. Only one person speaks at a time.
- * Be positive, non-judgmental, and open to new ideas.
- * Conduct a civil dialogue. Disagree without being disagreeable.

Follow the agenda, but be flexible.

If important things come up that are aligned with your desired outcomes, go with it! If discussions are veering off track, keep a 'parking lot' list to capture ideas and concerns and come back to them at a later date. Then take a short break and come back to the agenda items.

Keep an Action List.

During the retreat, capture an action list to track commitments, responsible parties and deadlines.

Build a Post-Retreat Follow-Up into your process.

You don't want all of your hard work to go to waste! In the planning process build in a follow-up meeting or conference call to review the key plans and accountabilities that were discussed. Keep the momentum up with regular check-ins.

