Strategic Planning Retreats – 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 many years of experience facilitating strategic planning retreats:

Retreat Planning Best Practices

1. Make sure you have the right people – no more and no less
2. Have a tightly focused agenda and be very clear about what you want to accomplish during your retreat
3. Don't just let discussions and presentations ramble on; use effective meeting tools
4. Make good use of pre-work
5. Make sure that action items describe who will do what by when and are "checkable"
6. Ensure that follow-up is part of the process
7. Consider using a neutral retreat facilitator so that you can focus on the content of the retreat while someone else takes care of the meeting facilitation process

A more detailed explanation of each item follows:

The right people...

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 right agenda...

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 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 The Vantage Group, we structure very focused agendas with a specific set of outcomes. As certified facilitators, we are able to work within a two-day framework to build an agenda for the retreat that explores 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 can be a powerful meeting and a very satisfied management team.

The right process...

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. Also, you could end up with a lengthy debate on the SWOT, and very little thought into specific SWOT items that need to be addressed. If, on the other hand, you survey your team prior to a meeting, these items can be quickly addressed so that you can get to the meat of your strategic planning.

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

The right pre-work...

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 specific questions prior to a retreat is far more effective and prepares them to contribute at a deeper level at the meeting.

Pre-work that involves brainstorming can be particularly effective if the results are collected in advance 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 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 on [date]

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 follow-up sessions. This meeting may be specific to the off-site or it may be a simple agreement to put the 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 two or three 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 from The Vantage Group at your next strategic planning retreat, please give us a call. The initial consultation is always free. Ask for Darrell Crawford at 616-676-3330 or email him at darrell@vantagegroupinc.com.