

Driving Team Engagement & Performance

8 Keys to Developing a High Impact Team Retreat or Offsite Meeting



If you look at some of the most successful organizations in the world, you can bet they didn't get that way doing the same thing every day. They had to think differently, adjust when conflict came up, react to change, and make strategic decisions to move the organization forward.

This type of thinking & decision making rarely happens by one person sitting behind a desk. For many of these organizations, it often requires the collaborative thinking of several different people. This could be a group of Senior Leadership or a cross functional team from across the company.

When an organization or team feels the itch to make a change, to make a big decision, or to solve a complex problem, this is when they will hold a retreat, workshop or offsite meeting. The opportunity to get their teams outside of the normal day-to-day and thinking bigger & more holistically are just a few of the benefits of holding these types of meetings.

Reasons to have a team retreat or offsite meeting

- ⦿ Develop Strategic Plan
- ⦿ Identify Strategic Initiatives
- ⦿ Set Company Direction
- ⦿ Drive Team Collaboration & Engagement
- ⦿ Solve Team Conflict
- ⦿ Improve Performance
- ⦿ Develop Ways of Working
- ⦿ Build an Action Plan
- ⦿ Identify Challenges & Risks
- ⦿ Establish Team or Company Roles

- ⊙ Build New Products & Services
- ⊙ Improve Communication
- ⊙ Recognize Success & Achievements
- ⊙ Make Company-Wide Decisions
- ⊙ Develop & Encourage Creativity
- ⊙ Solve Disputes & Mediate Tensions
- ⊙ Have Some Fun

Examples of meetings organizations hold to achieve objectives

- ⊙ Company Annual Kickoff
- ⊙ Board of Directors Retreat
- ⊙ Company Retreat
- ⊙ Facilitated Meeting
- ⊙ Collaborative White Board Session
- ⊙ Team Quarterly Kickoff
- ⊙ Sales or Department Meeting
- ⊙ Corporate Event
- ⊙ Keynote Presentation
- ⊙ Strategic Announcement

If you've decided that you're at a point in your organization that you need to plan some sort of offsite meeting or retreat to solve a problem, seize an opportunity, make a change, or a host of other things, there are lots of things to think about. In order to be productive and achieve the objectives that you set forth for your meeting, there are a number of factors that lead to success. Based on our experience leading offsite meetings & retreats, we have included some of the keys here.

Key 1 – Identify Your Purpose & Goals

If you're now thinking about doing some sort of offsite meeting or retreat, there is probably an impetus to that thinking. Maybe there's a problem you'd like to solve or an opportunity that you would like to see the team take action on. This type of thinking is outlining your purpose for the meeting. Let's say that your company is recognizing that you are seeing more competitors coming into your space. You may want to take a look at the market and decide whether to move laterally or to enhance your current brand, so you set an offsite retreat to think strategically about your market. Focusing on the positive, your offsite retreat *Purpose* would be to *Look Strategically at the Market and Determine Where & How We Want to Play*.

From there, you would identify your goals. Your mission will set what you want to get out of the retreat. It's similar to the purpose, but slightly different, focusing more on the *outcomes*. Our *Goals* are to *Identify How We Want to Take Our Product Forward, Develop an Action Plan for Our Purpose, and Assemble the People to Act on Our Plan*.

Alignment of the team or company heading into an offsite retreat is so important for the success of it. If the team knows why they're there, they can direct their energy towards that purpose. If they have goals, it keeps them focused throughout the whole event.

Key 2 – Identify the Core Issue

As you do your research to identify your purpose & goals, you may find that the core issue you have identified is between a small group of people. If this is the case, that may drive the way that you design your retreat, or it may make you realize that you don't need one now, but rather you need to focus on that issue. On the flip side, if when you're doing your research, you find that the core issue is bigger than you had originally thought, or a combination of issues that need broader expertise or consensus, the need for an offsite retreat is evermore present.

Key 3 – Develop Agenda & Content

Once you have your purpose & goals, this will drive your meeting agenda. First, you can check with your team on some things they might want to have on the agenda. You will need to be selective because not everything can fit; however, you will have the goals as guardrails. **If it doesn't help you achieve the goals, it shouldn't be on the agenda.**

When developing your content, you will have to assess what you need. If it's a more relaxed atmosphere, an agenda and notepads might be all you need. But, if you have some challenging goals to achieve, then having a presentation is highly encouraged. Your presentation could follow the outline below:

- ⊙ Introduction & Welcome
- ⊙ Agenda & Logistics
- ⊙ Purpose & Goals
- ⊙ Strategic Initiative 1
 - Describe It
 - Look at the Current Execution of It
 - Brainstorm How You Can Improve on It
 - Set Actions Moving Forward
 - Identify Ownership
 - Outline Measurable Outcomes
- ⊙ Break
- ⊙ Strategic Initiative 2
 - Describe It
 - Look at the Current Execution of It
 - Brainstorm How You Can Improve on It
 - Set Actions Moving Forward
 - Identify Ownership
 - Outline Measurable Outcomes
- ⊙ Break
- ⊙ Strategic Initiative 3
 - Describe It
 - Look at the Current Execution of It
 - Brainstorm How You Can Improve on It
 - Set Actions Moving Forward
 - Identify Ownership

- Outline Measurable Outcomes
- ⦿ Fun Activity
- ⦿ Team Dinner

This type of outline would probably occur over the course of a two-day retreat. This is a lot of information to cover. You will want to have templates and tools in your content that you can leverage to take notes and set action plans.

Your presentation can have some training in it, or it could all be focused on idea generation and collaboration. Setting up the way that you will work is very important.

Key 4 – Assign Ownership

Leading up to the meeting and then during the actual retreat or workshop, you will want to assign ownership for each component. For instance, as the leader, you may decide that you are going to take ownership for the retreat content and leverage a trusted business advisor or two to develop it. You may also have someone else on your team manage the logistics and another person focus on notetaking throughout the day. Having clear ownership makes it much more likely that things will go smoothly.

Key 5 – Manage Logistics

The logistics are a big part of what makes an offsite retreat successful and challenging to organize. The location and venue can largely set up the success of the retreat. One of the big benefits of going offsite is to get the team into a different mindset through a change in environment.

When looking at locations, you want to think about:

- ⦿ Accommodations if Needed
- ⦿ Travel
- ⦿ Conference Room Size
- ⦿ Technology Needs [Projectors & Power]
- ⦿ Temperature
- ⦿ High Speed Internet Access
- ⦿ Windows
- ⦿ Room Setup
- ⦿ Comfort Level
- ⦿ Food & Drinks [Dietary Needs]
- ⦿ Activities
- ⦿ Visuals
- ⦿ Brainstorm Materials
- ⦿ Wall Space
- ⦿ Bathroom Locations
- ⦿ Note Pads, Pens & Other Supplies
- ⦿ Other Items More Specific to Your Group

Key 6 – Set Measurable Outcomes

As you go throughout the retreat, you want to focus on actions and then how you measure those actions to achieve your goals. This is usually done towards the end of the retreat and is necessary to ensure accountability post-event so that everyone know what needs to be done and goals are achieved in a timely manner. Recognize that you might not achieve everything you set out to, and that’s okay. You can always set a meeting for further in the future to achieve more goals, or break up into sub-groups.

Key 7 – Leverage a Third Party

When you have some serious topics on the agenda, you don’t know how to put your content together, or you’re concerned about conflict, it can be helpful to leverage an outside facilitator. By nature, a facilitator should be knowledgeable about the business & have considerable know-how; however, they should be unbiased about the outcome. It should be someone that you trust to give a good opinion if warranted or asked, who can steer the conversation and provide guardrails, but should not drive the conversation nor make any decisions unless asked for input. Having a good facilitator can take the weight off the leader and accelerate the steps towards the bigger goal. An experienced third party can also assist with choosing the right location or setting for your retreat so you have one less thing to focus on. Another great idea is to have a trusted third party assist in developing your goals, actions, content and agenda if you’re unsure on the best methods or have limited time to get everything prepared.

Key 8 – Remember the Fun Factor

It can be easy to become so focused on big objectives that we forget about the fun factor. Part of team building & collaboration is doing something outside of the normal, and having a little fun along the way. When planning your event, pulse your team to learn about what they like, what they would enjoy and how you can put them in the best position to accomplish your goals while also having a great time.

If you have an upcoming retreat, event or you think you might like to have one, do not hesitate to leave a comment here or reach out on our contact page. We’d love to talk with you about how you can make your event super successful.