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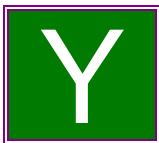
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SPECIAL REPORT

20 TIPS FOR A TREMENDOUSLY SUCCESSFUL EXECUTIVE RETREAT

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You and your colleagues are going off to think great thoughts at a retreat in the mountains or adjacent to a golf course (or both, if you're lucky). You can either squander the time or make it some of the most productive work you'll do all year.

Here's a rundown on making the most of your significant investment in time away from your piled-up regular work (and your loved ones), and your expenditure of dollars for travel, meals, lodging, consultants, and entertainment.

1. Make the off-site something more than an out-of-town version of your usual executive meeting. Use the special, relaxed venue to tackle issues that benefit from thoughtful reflection (e.g., strategic planning), or that enable sensitive interactions in a less pressured environment (e.g., disagreements over compensation).

2. Exchange ideas rather than disseminate information. Appropriate data should be provided in written form to participants for their digestion *prior* to the off-site meeting.

3. Create the agenda starting at the end. Define what a successful off-site meeting will have accomplished. Are you setting long-term strategy or solving current tactical problems; is this a reward

for a job well done (where play is appropriately prominent), or a forum for raising thorny issues. Any confusion or uncertainty about the objectives before the meeting will be magnified to an embarrassing, time-wasting degree during the meeting. And create resentment among participants after it.

4. Circulate a proposed agenda, soliciting reactions and suggestions.

Ask people to reply *anonymously*—it encourages candor without self-censorship. This process raises issues that might otherwise be overlooked or that are too politically sensitive for some to suggest directly. Ideally, you'll have more issues than your retreat time can reasonably accommodate; move the overflow to a regular meeting in the office.

5. Allot sufficient time for discussion and resolution. Budget time for discussing important issues that arise during the retreat, but weren't on the formal agenda; slot an hour for summarizing and evaluating the event.

6. Once set, the agenda should be thorough and sent to attendees well in advance of the off-site meeting to aid their thoughtful reflection and preparation.

7. Invite people, other than the senior executives, who can make a meaningful contribution to the discussion. Junior managers or professional staff may enrich the interplay

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of ideas. So might outsiders such as vendors or trusted colleagues from other firms. The most productive exchange of ideas will come without regard for rank. When you invite people outside the inner circle try to include them for as much of the meeting as possible. They'll feel valued and may make some valuable contributions of perspective that you otherwise wouldn't get.

If you invite spouses or guests, set everyone's expectation as to the amount of time they'll actually have with their meeting-bound partners. Provide *optional* (no implied obligation) activities for them.

8. Keep the number of participants manageable. While you want diversity of perspective, more than 20 participants makes meaningful interaction difficult. If you need to host more than 20, use a sub-group structure for discussions. If everyone in a large group must participate, consider using computers with specialized software designed especially for large interactive meetings where typing supplements conversing.

9. Involve key people by assigning them roles for the off-site. Have them investigate pressing issues and gather relevant information, or perhaps prepare to lead a discussion.

10. Require advance preparation and encourage people to bring relevant files and information. Taking five minutes to locate hard data in a briefcase saves 45 minutes of uninformed postulating—not to mention vastly improving the quality of decision-making.

Your off-site's effectiveness is directly proportional to the planning and thinking that *all* attendees put into the meeting *before* they take their first sip of a cool drink at the welcoming reception.

11. Communicate to attendees that the retreat is serious business. You're doing real work in a real nice setting. Stick to your timetables; don't tolerate tardiness, tangents, self-aggrandizing war stories, or people

drifting in and out of the session. You convene outside the office to improve productivity, not thwart it.

12. Structure the agenda to take advantage of the surroundings.

If you're not going to do that, save your money and book a meeting room at a local hotel. I've been at meetings held at fabulous off-shore island resorts where participants were held hostage through most of the daylight hours in windowless meeting rooms that could have been miles underground in Siberia as far as anyone attending the conference could tell.

The middle of the agenda works well for free time. Participants get a breather to digest the heady discussions, and to refresh their perspective. The moderator and the executive responsible for the event get an opportunity to review the meeting's progress and adjust the agenda if necessary.

Get an early morning start; wrap up late day discussions before pushing people to numbed exhaustion. If the meeting includes more than one overnight, give attendees a night with no group function to clear their heads with some personal space.

13. Put one individual in charge of the event.

Vest this person with the authority to make decisions about logistics, budgets, and menus. Well-run meetings are well-planned meetings; diffused responsibility becomes confused accountability and condemns your affair to mediocrity. The more involved the event, the more you'll benefit from professional assistance (see sidebar). Word to the wise: retain competent help and allow them to help you by trusting them to do their job.

14. Make clear, in advance, to your attendees the expenses the company picks up and those for which individuals are responsible.

Will you pay for golf? Greens fees and clubs *and* cart rental? How about a massage instead? Does "breakfast on your own" mean the individual pays or just eats at his or her convenience. Will you pick up the tab for a nightcap; how

about gift shop charges? Room service? Clarity before the event spares animosity after it.

Consider a flat recreational allowance. Arrangements can usually be made with the host facility to transfer certain charges to your master bill, while collecting others from attendees. (See sidebar on facilities and meeting planning.)

15. Use an independent facilitator. Even a highly skilled employee cannot be completely dispassionate or detached from issues where the stakes include personal gain or one's political standing. An effective outside moderator will do more than fill flip charts with scribble, and wallpaper the room with them while asking, "Any more thoughts on that before we move on?" He or she focuses the discussion, keeps to the timetable, and makes sure that all attendees are participating. A good moderator can deftly deal with the biggest, toughest and shrewdest egos in the room, and comes with both strategic insight and operational savvy. Following the off-site, the independent consultant can help ensure that action items that sounded so good away from the office actually get implemented there.

16. Engender a no-holds-barred discussion. I've attended far too many think-tank discussions where the top-ranking participant opens a discussion by saying, "Here's where I stand on this issue, now what do you think?"

The most fruitful discussions involve the widest range of thinking without regard for rank, fear of reprisal, or concern for political correctness. An able moderator, using a variety of effective discussion techniques, should draw in all participants, draw out a variety of viewpoints, and draw the discussion to a conclusion at the appropriate moment.

Keep discussions focused on issues, never people. Encourage disagreement and untraditional thinking. All progress begins with these two words, "What if ..."

17. Assess the event. While it's fresh in everyone's mind, evaluate what worked and what you'd change for the next time.

What about Teamwork?

Demands exceed the budgets for marketing, R&D, technology support, even merit compensation for current staff. Some senior executives are barely speaking to one another. Others are shouting at each other. The pop panacea: Team building games. In this scheme, a peppy, cheerleading, "experiential facilitator," leads you and your colleagues through a series of rope courses, trust falls, and treasure hunts (or other seemingly pointless make-work drills).

A word about teamwork exercises: Caveat emptor. Catching a colleague who's blindfolded and falling faithfully off a log backwards into your waiting arms is one thing, translating that experience into something that makes him much less of a conniving control-freak back at the office is another. Unless there is clear linkage between the fun in the woods and your business, team-building games may have as much relevance to changing work-related behavior as holding a seance to improve communication skills.

Ensure that games in the woods or on the beach relate directly to a real situation or issue back at the office. Immediately after the game, or first thing when you get back to the office on Monday, explicitly tie the game experience to a possible change in a real world procedure or behavior. If you don't overtly make the connection, the linkage likely won't be there.

18. End with closure. One of the biggest complaints from retreat participants is that the wonderful off-site experience yielded fresh thinking, great insights, inspired proposals, and no changes back at the office. Whenever possible, end a discussion with a decisive

conclusion. Your moderator should provide a written record of the discussion with special attention focused on decisions reached, tasks and responsibilities assigned to specific individuals, and the related due dates. This wrap-up report should be provided to all participants with your thanks for their participation and a pledge to implement their recommendations.

19. Capitalize on the retreat quickly. Making a visible change immediately upon returning from the retreat translates the off-site to the office. It sends a message to the participants that their thinking and recommendations have value; and it signals to those who

didn't attend the meeting that it was something more than a junket.

20. Schedule a post-retreat follow-up meeting with your outside facilitator about five weeks after the event to assure your investment. A post-meeting meeting refreshes everyone's memory and renews their commitment to actions conceived far from the stress of pressing matters.

Assess: Did you do what you agreed to do. Are projects on track? If not, why not?

By completing the process, you assure you get an adequate return on your investment of time, energy, and, most importantly, your thinking.

Finding the Perfect Planner to Find the Perfect Place

Inclined to turn over the mundane logistics for your retreat to your secretary or travel agent? Think again about that. A successful meeting involves myriad details, opportunities and pitfalls that escape the unaided eye.

An entire profession has grown from the demand for competent meeting planning. Even top travel agencies often have separate meeting planning divisions with experts savvy to choice locales and hotel facilities (which they may refer to as "properties"), and wise to the nuances of negotiating concessions from hotels (squeezing significant savings from the hotel's "rack rates" or list prices), planning memorable meals, securing room upgrades, arranging transportation and scheduling recreation for your attendees, as well as anticipating and defeating a thousand show-stoppers that wouldn't occur to the uninitiated.

People who plan meetings for a living often belong to the Dallas-based industry group Meeting Professionals International with some 13,000 members around the globe. MPI, an educational organization, confers upon members who pass a written examination on the vagaries of managing meetings (including fine points on contracts, public performance of copyrighted music, and other meeting esoterica) a designation of Certified Meeting Professional, or CMP.

Meeting planners take their compensation in a variety of forms: commissions from hotels, restaurants, and recreational vendors (golf courses, stables, marinas); charge hourly fees; quote a fixed fee for managing your event; or a combination thereof. Discuss fees up-front, and get a clear understanding as to what's included and what's not. Chances are, if you're dealing with an experienced professional you'll get your money's worth.

If you're intent on going it alone, look for a "conference center"—a specialized hotel that caters to business meetings. They usually offer an inclusive, per day per participant price for sleeping and meeting rooms, meals, flip charts, overhead projectors and other meeting paraphernalia that ordinary hotels bill a la carte. Per diems (starting at about \$175) at such centers may include certain recreational equipment such as bicycles, basketballs, canoes and tennis rackets. Golf fees are usually not included as standard. Ask about "low season" rates to take advantage of situations where supply exceeds demand. Great deals usually can be had immediately before or after the change of seasons when the weather may not be optimum, but, with a little luck, quite acceptable.