

## Using Off-site Retreats as a Strategic Business Tool

By Mark Lefko

The off-site retreat has evolved from a tax-deductible vacation for corporate executives and board members into a strategic business tool. Corporations, professional service firms, small businesses and nonprofits alike use retreats to unlock the power of the team. The new retreat is no longer a standalone annual event, but part of a comprehensive, methodical program. Advance planning, professional facilitation, follow-through, follow-up and measurement of ROI all ensure that the off-site is not an unproductive exercise, but a dynamic tool to take the organization to the next level.

### Unlocking the Power of the Team

The terms “team,” “teamwork” and “team spirit” are much bandied about in the management literature, but how exactly do you unlock the power of a team? Given effective planning and facilitation, off-site retreats are a sure way to do so. Why? In the daily race of the office environment, everyone is heavily focused on the tactical. Huge amounts of information, multitasking and frequent change of direction make strategic thinking and planning next to impossible. It’s an environment that discourages consistent communication and leaves little room for creativity. At a retreat, on the other hand, people can interact without distraction. They can concentrate on working on the business rather than in the business. There is time and space for in-depth thinking and communication. This focused interaction in turn deepens the relationships between colleagues and their mutual under-

standing of goals and values. It’s a safe environment in which to freewheel about future possibilities, brainstorm about new products and services, and build consensus around ideas and priorities.

Here are some common-sense guidelines to make sure an off-site retreat lives up to these expectations.

### 1. Pre-retreat Planning

The first key to success lies in the preparation. Well in advance of the retreat:

- Identify the program sponsor (e.g., CEO, Vice President, Managing Partner, Executive Director, etc.).
- Clarify the desired outcome. Specifically, what has to happen or change in order to make the retreat a good investment of time and money? Be realistic. Less is more. Retreats often fail in trying to accomplish too much. Too many discussion points allow for only superficial coverage of each one, and people leave with too many action items, initiatives and objectives. Soon they become overwhelmed with daily activities and all good intentions fall by the wayside. A good rule of thumb is to limit the discussion to two or three topics.
- Define and implement a process for participants to prepare for the retreat (e.g., reading, research, completing surveys, giving thought to issues and challenges that will be the focus of the retreat).

### When Should You Have a Retreat?

Retreats are not just annual events for strategic planning anymore. There are at least 10 circumstances that call for a retreat during the course of the year:

1. Activities appear to be out of alignment with the company’s strategic direction.
2. You know where you’re heading, but you’re not sure about the best tactics to get you there.
3. Everyone is firefighting, and that keeps them from the tasks that matter.
4. Management is having turf wars, and it’s killing the company.
5. The lines of communication are stopped up, and no one is sharing.
6. You want to build consensus for a project.
7. You want to create a new product or reposition a service.
8. You want to increase top-line revenues.
9. You want to strengthen profitability.
10. You want to encourage cross-selling among divisions.

A day of focused interaction on any of these topics, away from the office, will open the channels of communication and realign your team’s efforts to tackle the issues.

## 2. At the Retreat

Off-site retreats can generate huge ROI, provided they are facilitated professionally. Do not ask your HR or training department to facilitate the retreat since any employee, regardless of department, is subject to the pressures of the organization's structure and political environment. Facilitation requires a neutral third party who can:

- Be candid, challenge even a senior leader's or business owner's ideas, and manage everyone's expectations with strength and confidence. When a professional facilitator challenges assumptions and candidly points out flaws in someone's thinking, participants understand that it is only in the best interest of the organization.
- Generate a sense of excitement and engage participants to interact and examine all the issues.
- Introduce valuable new ideas and best practices from other industries and environments.
- Unlock the power and creativity of the team. Unlike a trainer who shares and infuses content, facilitators have no agenda to teach or train. Rather, they have many tools at their disposal to enhance the dynamics of the group and unleash creativity. The idea of facilitation is not to tell the team what they ought to know or do, but to get the best thinking out of the group.
- Get the group to reach consensus about the two or three major initiatives or objectives that have been selected to pursue.
- Ensure that everyone comes away from the retreat with clear objectives, specific action items and accountabilities with target completion dates and a follow-up program.

Frequent retreats, ideally on a quarterly basis, exponentially increase the effectiveness of the team.

## 3. After the Retreat

The primary factor that distinguishes a run-of-the-mill, unproductive retreat from a strategic business tool is follow-up. Retreats fail when people come away excited and enthusiastic, but nothing happens. Having a one day per quarter follow-up program is a good rule of thumb. The idea is to look back at the retreat and ask:

- What did we decide to do and why?
- Are the reasons still relevant? If they are not, you must be flexible and willing to modify the action plan as needed. Without follow-up and modification as necessary, the retreat becomes a static, ineffective exercise rather than a dynamic tool.
- What tangible results have come out of the retreat? As with any business tool, measuring success and ROI is critical. Remember, what gets measured, gets done. Surveys are an excellent way to benchmark progress through objective feedback and assessment. For example, what was the retreat's effect on communication levels within the senior team or the company? How has financial performance changed? Have job satisfaction and retention increased? Is there greater buy-in among employees? What

has changed in the organization for the better or worse? Quarterly surveys can keep the momentum of positive change going until the next retreat.

## Communicating to Engage

Communication is the most significant success factor in business today. In fact, all tension and frustration in the workplace ultimately stems from lack of communication, or from poorly organized communication systems. In the absence of forums for open discussion and exchange of information, people become cynical. They no longer participate fully to create value for the organization.

While the baby boomers may have been content to work hard and stay with a company that provided a good salary and benefits, the younger generations want a more meaningful career experience. They need to feel that they are part of something bigger. Without communication, they cannot see the big picture nor provide input to improve it. Disillusioned, they simply move on to another employer, taking with them the intellectual capital of the organization, which always represents a loss to the organization. The way to retain team members and capitalize on the power of teams is to involve and engage people. Off-site retreats are a perfect way to do that. ♦



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