



Introduction

One of the unavoidable habits of the corporate world is to convene meetings. Management meetings, review meetings, board meetings, departmental meetings, and weekly meetings (usually called Monday meetings) are some of the categories that we've come to know over the years. Think about how many times you've been told "He's at a meeting" when you call or visit corporate offices. Sometimes, it makes me wonder whether people get paid to attend meetings.

A common corporate meeting is the "strategy retreat" - also referred to as "strategy session" or "management retreat". Nice words that describe two or three-day meetings which may not yield the desired results (assuming results are defined in the first place). Companies hold these annual or periodic events during which executives assemble at an offsite venue supposedly to deliberate on "the way forward". The assemblies generate excitement at the prospect of going away for a couple of nights but frequently end in anticlimactic fashion. Typically, the meetings will have plenty of talk, loads of presentations, lengthy debates; breakout sessions, discussions, analysis, and of course, food. Yet a good number of these executive assemblies do not produce results that match the time, effort and expense involved.

Three questions are relevant in thinking about the subject of failed strategy meetings:

1. Why do intelligent corporate executives assemble for a two-day offsite meeting and generate dull results?
2. Why do executives hold a strategy meeting and reassemble one year later without much progress?
3. Why do companies conduct strategy retreats like training sessions?

These questions can lead to several others which we'll preferably not ask. Instead, we'll focus on providing answers in the form of **Eight Success Tips for Strategy Retreats**. Implementing these tips will ensure that strategy retreats are no longer the waste of time and effort they sometimes can be.

Success Tip #1: Define Clear Objectives

This is a make-or-break success factor for a strategy event. The meeting is already destined to fail if objectives are not defined in advance. Think about this: If we don't know clearly why we are assembling, how can we assess whether the assembly has succeeded?

The rules of professional facilitation specify that you should never convene a meeting without specific objectives. These objectives should be such that they can be evaluated by results at the conclusion of the meeting. Yet, the definition of objectives is either ignored or trivialized by meeting organisers. In this regard, one frequent shortcoming is defining generic objectives such as "to deliberate on the way forward for the company in year..." or "to review performance and plan for the year ahead". Objectives should describe specific *and* measurable aims or purposes for convening the meeting.

Whenever I work with clients on strategy meetings, I always insist on starting with objectives. Defining the objectives enhances the thought process for the agenda. The philosophy here is simple: If I know why I'm having the meeting, then it's easier to decide the activities for the meeting. In thinking about objectives, a key question is: What is the aim or purpose of convening the meeting?



Success Tip # 2: Define Expected Results

Another important component in designing a strategy retreat is defining the expected results or outcomes. This involves starting with the end in mind. Whereas objectives relate to what we will do (aim or purpose), results focus on what we will obtain from what we will do (the outcome or consequence). For example, objectives could include “*to define a vision for the company*” while a result will be that “*a clear vision for the company was arrived at by consensus of the participants*”. In practice, a group could set out to define a vision but fail to do so for one reason or another. This means that they had an objective but did not obtain a result. There should be no doubt in the minds of people when a result has actually been achieved.

At Ashford and McGuire Consulting, we always conduct participant evaluations at the end of meetings we facilitate for clients. The evaluations are tied to the defined objectives and expected results. Specific questions about whether the expected results have been obtained are included in the evaluation sheet. Participants are therefore able to determine whether results have been achieved or not and attach a rating on a scale of 1-10. This would be impossible if the results were not pre-defined. Knowing that they didn’t just attend an ‘executive jamboree’ leaves the participants energized as they close the event.

Success Tip # 3: Design an Effective Agenda

The agenda can be equated to the design of a house which indicates the location, dimensions and use of each space. Designing an *effective* agenda ensures that the objectives and results are linked to the activities. The word “effective” has been deliberately highlighted. It implies that the agenda directs the meeting to achieve the results that have been indicated.

Contrary to the thinking in some corporate circles, an effective retreat is not about long hours or long speeches. I’ve heard comments about strategy retreats such as “*we were working on the mission statement till 2 o’clock in the morning*”. Such a statement usually signals a poorly designed agenda.

An effective agenda is also not about snazzy presentations that generate loud applause but don’t resonate with the results! Rather, it’s about how the activities on the agenda connect with the results defined at the onset. This connection requires a deeper thought process than is often imagined or exercised by retreat organizers.

An effective agenda should be logical. Think about the process of building a house from foundation to finishing. Surely, you won’t paint before plastering and you won’t plaster before placing the blocks! Unfortunately, this is what sometimes happens with the agenda. In a logical agenda, the activities represent building blocks that engage the participants.

Recently, I was invited to facilitate the strategy aspect at the “strategy retreat” of a small company. In trying to decide whether to accept the invitation, I requested for the agenda. I discovered that it had goal setting for individuals (which is not an item for a strategy retreat) on Day 1. It also had a host of disjointed activities and topics on Day 1 and Day 2 – customer service, personal effectiveness, brainstorming, frank talk, etc. The review of vision and mission statements was on Day 2 scheduled from 9 p.m. to midnight! I politely turned down the



invitation to participate in such an agenda and advised that it be redesigned to generate better results for the time spent.

An agenda for strategy must involve strategic thinking. The objectives and results are the foundation for the thought process that produces the agenda. The blocks of the agenda building must be fitted neatly to each other until the whole house is finished.

Success Tip # 4: Ensure Coordinated Presentations

Presentations should be connected strongly to the objectives and results and not used as digressions. An expert's presentation can also be useful to emphasise or precede a part of the agenda. Furthermore, there's no point in having a presentation that leaves the participants wondering what it was all about. Such a situation makes it difficult for both the facilitator and participants to 'reboot' their brains.

Presentations can also serve as icebreakers especially if they are made in fifteen minutes and engage the participants. You can also have what I call "strategic learning" presentations. Such presentations would have themes that are relevant to all participants and provide a background or a rider to an aspect of the agenda. Reasons for such presentations include putting everyone on the same page and taking advantage of the occasional assembly.

The rule with presentations is to ensure that they are coordinated with the agenda and build on the process leading to an eventual result.

Success Tip # 5: Limit or Exclude Speeches by Executives

Strategy retreats are not the most fitting events for executive speeches. CEOs should be careful about "opening remarks" which might direct the agenda. It is better for the CEO to close the event than to open it because concluding remarks don't filter into the process. This suggestion is applicable to both closely managed and large organisations.

Useful guidelines concerning speeches are:

- For introductions, avoid those who are prone to verbose or lengthy speeches.
- If using an external party, be specific about time allocation and content.
- Ensure that speeches add value to the agenda and are not 'for the record'.
- Bringing a middle manager to the podium can help reduce hierarchical barriers
- For CEOs, closing has a more positive impact than opening.
- Recorded videos by famous people can be a substitute for a CEO's remarks.

In summary, speeches, like presentations must be connected to the agenda so that they don't kill the atmosphere for participants.

Success Tip # 6: Select an Appropriate Venue

Strategy retreats can be like weddings – the reception venue and guest seating arrangements can make or mar the event. Consequently, you cannot be too careful with venue selection. Although



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the key considerations are usually cost and space, from a professional perspective, there's far more to venue selection. Here are some factors to consider in selecting a venue:



1. Adequacy of space: Room should comfortably take the number of participants and leave space for bodily movement and easy entry and exit.
2. Flexibility of space: Means 'easy to rearrange'. For example, if tables are not required.
3. Walls: White or pale coloured walls. Please, no green or brown walls or wooden panels!
4. Ventilation: Functioning air conditioners that can be easily regulated.
5. Lighting: Best option is fluorescent lighting. Avoid spotlights and dull 60 watt bulbs.
6. Windows: Excellent for letting in natural light but be should not be distracting. Also useful, if air conditioning fails temporarily.
7. Flooring: Floor tiles in pale grey, milk or other light shades. Light shades of granite or marble are fine. No loose PVC tiles and if possible, no carpets.
8. Cabling: No cables crossing the floor.
9. Seats: Padded seats with firm wooden or metal legs. Plastic chairs are not recommended.
10. Break out rooms: Good if available but good facilitators can work without them
11. Conveniences: Preferably gender-separate; clean toilet bowls and floors, running water (not buckets of water), wash basins, functioning flushers.
12. Meals: Investigate the menu in advance. Dining area should accommodate all participants.
13. Leisure: Optional and useful for residential events.
14. Location: If you don't want official distractions, then offsite is better. If you can find a location where mobile phones don't work, then that's best!

This might seem like a long list but each item contributes to the success of your event. Even if you can't find a venue with all of these attributes, let your checklist comply as much as possible. At Ashford & McGuire Consulting, included in our pre-event procedures is an inspection of the venue to ensure its suitability for the purpose intended. In certain cases, we could insist on a venue which in our professional judgement is best suited for an event.

A good venue enhances the level of participation and serves as an energiser for the participants and facilitators. It also reduces interruptions and distractions that could negate the expected results. Don't trivialize the selection of a venue.

Success Tip # 7: Use a Professional Facilitator

Use a facilitator and not an instructor, trainer or speaker. What's the difference between a facilitator and a trainer, an instructor or a speaker?

Trainers and instructors are used to doing most, if not all the talking. They therefore tend to apply a directive approach to a facilitated process, often with adverse results. A speaker is exactly what the word says: he speaks to the audience. A good speaker is not necessarily a good facilitator. In fact, a good speaker could be somewhat in love with his voice and carry on with a monologue. A facilitator understands and plays the role of a process leader. The facilitative approach builds consensus and engages participants in a process that leads to results.

In co-facilitating the strategy retreat of a client, I witnessed how an "instructor" from another firm (he wasn't a facilitator) tried to whip the participants to submission! As the meeting wore on, he got frustrated by their seeming lack of cooperation. *Facilitation involves engaging the participants in a process and not instructing them on a topic.* A good training instructor should not be



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mistaken for a good *process facilitator*. The skills required are not exactly the same and the expected results are different.



In closing this tip, I must return briefly to Success Tip # 3: Design an Effective Agenda. The agenda gives a clue to whether the process leader will be facilitative or instructive in style. For guidance on this: query the agenda, examine the link between the objectives and results, assess the time allocation, question the approach and find out about past experience. If possible get names of references and contacts - not just a client list, but people you can talk to about results generated for them.

Success Tip # 8 (Conclusion): Apply Tips 1 to 7

Next time you are conducting a strategy retreat, ensure that you get results from it. Let it not be a mere assembly of executives. These tips have been written to help you improve the quality and outcomes of your next strategy event. Apply them and witness a positive transformation in your results.