

Keeping a retreat moving forward

Retreats can lay the groundwork for success, but are meaningless if not done properly

BY SUE NADOR

Company retreats are always popular. Busy leaders and teams can get away from the day-to-day pressures and distractions of the office and focus time on important activities like strategic planning, skills development and change initiatives. And, of course, there's the invaluable socializing.

But are retreats really worth it? Is there a positive return when one takes into account the investment of taking people away from their jobs and associated expenses such as accommodation or external facilitators? Do employees leave feeling the time was well spent? Most importantly, is there a sustained benefit once people are back at the office?

These are all valid questions for organizations considering a retreat. The

good news is that with proper planning, execution and followup, a company retreat will have a positive payoff.

The hard part

Planning is the hardest part of any retreat and makes the execution look easy. Effective planning includes:

• **Establishing clear and measurable outcomes:**

Every retreat needs a quantifiable goal. Examples include developing a strategic plan that has the buy-in of all executives or developing new skills to better manage customer partnerships. But keep the goals realistic as retreats typically last only a few days. A plan to continue the good work started at the retreat should be thought through in advance.

• **A well-defined agenda with clearly defined roles:**

Based on the goals, a de-

■ CASE STUDY

Ontario Realty Corporation breaks from tradition

Greg Dadd, acting president and chief executive officer of the Ontario Realty Corporation (ORC), the agency responsible for managing real estate for the Ontario public service, recently held a three-day retreat for his managers on the topic of customer service.

His objective was "to take a look at what we wanted to accomplish at ORC, involve people in sharing information and develop solutions that we all owned."

In contrast to previous retreats that focused on presentations, this meeting focused on facilitated discussions that mixed people from across every region and function to identify ways to continuously improve current processes and practices. People were assigned to break-out groups to tackle key issues that "allowed for different points of view and perspectives to be applied to the issue, as well as the opportunity for people to establish relationships with other people they normally would not interact with," said Dadd.

The retreat provided an opportunity to break down silos and forge networks that would not happen as naturally on their own.

Another interesting element of the retreat was that the ORC invited a key client to talk about what customer service meant to them. This "voice of the customer" provided a sounding board for solutions that were proposed by participants during the retreat.

"These solutions were documented in a work plan before the end of the conference so the momentum is not lost, and there is a commitment to following through," said Dadd.

tailed agenda should be agreed to by the person in charge of the retreat. This includes confirming how each element of the agenda builds on the others to deliver the overall objectives. It also involves confirming

roles. For example, will the person in charge be an observer, facilitator, resource or presenter at the meeting? Clarifying roles in advance and visualizing the

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■ CONFERENCE PLANNING

Getting the most out of retreats

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meeting through the eyes of participants will support effective planning.

•**Communication to retreat participants:** The communication should clearly explain the objectives of the event, including outcomes and expectations of participants, prior to and during the retreat. It can also include homework to ensure everyone comes with the appropriate background to engage fully in the discussion. This saves valuable time by eliminating the need to review material at the retreat everyone can read in advance. This preparation also reinforces everyone's responsibility to be active participants and assume responsibility for quality outcomes.

At the retreat

Successful retreats are a balance of work, networking and fun.

Networking and fun are legitimate goals of retreats. Meeting colleagues in a different environment can foster new friendships and build stronger networks. It is particularly useful for people to meet colleagues in other parts of the organization so they can form valuable contacts and have better access to cross-functional information.

Networking can be achieved by breaking up content delivery with exercises and well-conceived discussions. Keep in mind that participants learn best and are most motivated when they are actively engaged.

There is nothing wrong with bringing in industry experts or motivational speakers to bring new ideas, or heighten energy, as long as there is a realistic expectation of what these speakers can accomplish. All too often employees are mesmerized by brilliant speakers who motivate them, only to feel deflated when the organization is unprepared to

implement any new ideas.

But the most important part of the retreat is to make the business more effective in some way. The great ideas generated should be captured for later consideration. Frequently great ideas are lost, only to be revisited again at next year's retreat. The key is to engage participants in solutions and find champions for specific initiatives.

When the retreat is over

Retreats do not achieve their potential when regarded as an "event" rather than as part of a larger change initiative. Follow-through activities are important to maximize

the return on investment.

Within a week of the retreat, while the experience is fresh in everyone's minds, a formal debriefing should be scheduled to discuss what was learned, what worked well, next steps and opportunities to improve future retreats.

Followup communication is important. This includes a summary of outcomes, decisions and next steps to ensure participants have a shared understanding of expectations and can see their participation mattered. It may also include communication to other stakeholders in the organization who did not attend but may be affected by decisions made there.

Team leaders who participated can be provided with slides highlighting material presented and key outcomes to share and discuss with their teams.

While most participants have the best intentions of implementing decisions made at the retreat, the reality of returning to a full inbox of e-mails, voice mails and deadlines can impede progress. A champion should be assigned to track and report progress to the senior sponsor and move commitments along.

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■ BEST PRACTICES

Will the retreat be worth it?

Before an organization pulls its leaders and teams away from their BlackBerries, cellphones and projects for a retreat, it should answer the following questions:

- Does the retreat have a clearly defined purpose and outcome? Would there be a downside to not having a retreat at all?
- Will the retreat allow for the focused attention, collaboration, creativity and networking that would be difficult to achieve back at the office?
- Is there senior management commitment, a plan and dedicated resources to ensure decisions at the retreat will be implemented?

If the answer to all these questions is an unqualified yes, there's a good chance the organization will enjoy a memorable event with a positive effect on the company and a healthy return on its investment.