



Potentials Realized

Coaching, Training and  
Consulting Services

## Corporate Retreats: 6 Essential Design Principles

Corporate retreats or offsites provide the opportunity for team building, planning, reflection and strategizing. They can elicit the response “Oh, no! Not another waste of time!” to “Wow! I’m really looking forward to it.”. This article puts forth six design principles to make your next corporate retreat hit the mark.

### 1. Be Strategic on What You Want to Accomplish:

One of the common pitfalls for corporate retreats is that either too many or too few objectives are set. Be strategic on what you want to accomplish.

Ask yourself: What do you want to achieve during the retreat? As a result of the retreat? What do you want staff to take away? What are your largest priorities? What foundation do you want to create for the staff team?

Be as specific as possible, making your objectives measurable. As the old adage says, “What doesn’t get measured, doesn’t get done”.

### 2. Get Employees involved in the design of a retreat:

Many times retreats fail because employees are not involved in the design of the retreat. What would employees like to see covered?. Find a balance between the corporate objectives and what employees really want covered. Is it a 80/20 mix? A 50/50 mix?

The retreat facilitator can survey employees to assess what they would like to have included, and to gather their expectations of the retreat process and outcomes. This can be done at staff meetings, if teams are small enough through one-on-one discussion, or via an email or web based survey tool.

### 3. Less Is More – Ensure You Schedule Enough Time:

A common pitfall with retreat design is that everything tends to get thrown in. In your design work, ensure that all stakeholders are clear on what really needs to be covered versus what they would like to have covered. It may be useful to categorize the possible topics into What’s essential, What would be nice, and What can wait to another time or forum.

Less is truly more in terms of impact. Allow sufficient time during the retreat for participants to discuss the topics of relevance and to reflect. It is also important to leave time for participants to create an action plan, linking the retreat discussions back to the workplace. If not all your topics can fit into the retreat you have scheduled, look at adding an additional day to the retreat or scheduling another offsite later in the year.

#### **4. Choose a Facilitator Wisely**

Who will be facilitating your retreat? An external facilitator brings the benefits of neutrality and complete focus and dedication throughout the retreat process. When looking at the external facilitator option, choose a facilitator who is committed to partnering with your organization for the long term, at least for several retreat processes. This will foster stronger trust with your team, enabling subsequent retreats to start from a higher level. The external facilitator will also develop a better sense of your corporate priorities, culture and vision with time. When using a new external facilitator, ensure that sufficient time is spent on briefing, including discussions on expectations, outcomes and your past experience with retreats – what's worked and what has not.

Given that corporate priorities can shift with time, ensure that you leave sufficient planning time, and that the facilitator can adapt the program to meet the rapidly changing needs. To ensure success with an external facilitator, create an internal retreat planning team who can serve as the liaison throughout the whole process, ensuring a seamless fit.

Internal retreat leaders also play an important role within the retreat process, and bring "insider" knowledge as to what the organization is all about, the culture and the priorities. If an internal retreat leader is used, ensure that they are given sufficient authority and scope to undertake their role. You may also want to consider pairing an internal facilitator with an external facilitator.

#### **5. Make it Regular!**

To gain the same "traction" you have on retreat, make retreats regular and not just once a year. Schedule half to full days out of the office several times a year for departments and if possible the entire organization. Virtual Retreats can also be utilized to provide mini-retreat processes throughout the year, without the added expense of time and money to an offsite.

#### **6. Follow Up:**

Create the Learning Link Back to the Office – Many times learning is left at the retreat location and sadly does not transfer back to the office. Throughout the retreat process ask yourself: What can we do to bring this learning back to the office? What systems do we already have in place which can be leveraged to discuss our retreat learning? What systems should we create?

To strengthen the learning link back to the office, schedule time during the retreat to create action plans, at the individual, team, department and/or corporate level. Action Plans should identify time frames, resources needed, who is accountable. Action plans should be as specific as possible. Action plans need to be followed up on, either as part of regular team meetings, through one-on-ones with managers, or through other internal systems.

To keep the learning alive, consider holding group or team coaching sessions after the retreat with smaller teams or individual employees. Monthly or bi-monthly sessions can support the transfer of the learning back to the workplace.

With these six design principles in mind, your next retreat should be meaningful, engaging and sustainable, leaving your employees asking "When are we going to do this again?".

**Copyright 2007 - Potentials Realized. All Rights Reserved**

Jennifer J. Britton is the founder of Potentials Realized and a co-founder of Integra Leadership Inc. Jennifer works with corporate clients and business owners to achieve the success and impact they desire in teamwork, business, balance and performance issues, through the provision of coaching, consulting and training services. She regularly facilitates teambuilding sessions and retreats (virtual, on and offsite) with governmental, nonprofit and corporate clients. As a performance improvement specialist, she works with leading edge organizations across North America and the Caribbean. She is a Certified Professional Co-Active Coach, a Certified Performance Technologist and a Certified Human Resource Professional. Jennifer provides team, group and executive coaching programs. Jennifer is known for her engaging, results-oriented, customized collaborations.

Visit Jennifer online at <http://www.potentialsrealized.com> and <http://www.groupcoachingessentials.com>