



Focus

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How to Plan a Retreat

A good leader knows the value of off-site meetings. Some are mostly social events designed to increase camaraderie or reward good results. Other retreats focus on “stargazing” and other strategic planning activities. Whatever the reason, meeting outside the normal workplace walls has benefits for any organization: a corporation or not-for-profit, long-established or embryonic, large or small.

I want to reemphasize this last point about group size. Retreats are not just for big corporations, or even big groups. I’ve helped departments as small as four people with economical off-site retreats that led to:

- Clarification and alignment of personal and departmental goals,
- Things to stop doing and start doing, and ultimately
- Productivity improvements.

Effective retreats don’t have to be complicated or expensive. They do, however, require planning.

I recommend the following four step process for designing and planning a retreat.

1. **WHAT.** First, clarify **what** you want to accomplish. As Dr. Stephen Covey famously said, “Begin with the end in mind.” Clearly define the goals, and describe what the work products of the off-site will look like.
2. **WHO.** Next, identify **who** should be involved. The answer to this question logically follows from the meeting goal. Avoid inviting people who will not contribute to the meeting; “receive-only” participants don’t just take up space – they drain energy from the conversation.
3. **HOW.** Once the goals and retreat participants are defined, establish a retreat location and timeline. Use the timeline to budget activity time and guide **how** the meeting will be structured.
 - a. Use an icebreaker or warm-up exercise to begin each day’s activities.
 - b. Alternate breakout team work with discussions involving the entire group.
 - c. The best retreats include hands-on activities, physical movement, and brainstorming discussions. Consider multiple venues or “mini road trips” as part of a meeting.

4. **WHEN.** Last, set dates far enough in advance to allow people to plan for the retreat and carry out any pre-retreat activities. Telling people **when** far in advance shows respect for their schedules and indicates the meeting organizers have been thoughtful and planned well.

Finally, I believe that no good deed should go unrecognized, so I'll thank my new acquaintance Carolyn for sparking in my mind the idea for this article.

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Wagner Consulting Group helps leaders prepare for succession,
develop employee management skills,
and solve strategic problems.

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