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Focus

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DIY Retreat Planning

The late Stephen Covey famously asked of his time management seminar audiences, "Have you ever been too busy to stop for gas?" The laughter was always immediate, and also somewhat nervous. Clearly, some audience members had followed that situation to its inevitable conclusion!

It's one thing to run out of gas in an automobile, but quite another to run out of runway in an organization. Bad things can happen when a leader becomes so wrapped up in day-to-day issues that s/he doesn't make time for strategic planning. Regular strategic planning retreats are part of the culture of large, high-performing organizations. Small organizations can also carry out cost-effective planning retreats and enjoy the benefits like their larger brethren.

Sometimes the best choice for developing a planning retreat is to hire an experienced meeting facilitator, but a do-it-yourself approach may also work. Use the following outline as a guide for the DIY process.

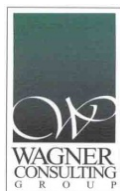
1. First clarify the meeting goals. Perhaps teambuilding and brainstorming are the main objectives. Maybe the leader wants to clearly communicate business priorities and seek alignment and buy-in. Some retreats are focused on developing a strategy for the coming year. Whatever the ultimate objective, the meeting goals should guide the retreat content and length.
2. Next, establish your time budget. This is a critical step; too little time means expectations won't be met, and too much time leads to bored participants and wasted money. Much can be accomplished in four to six hours, but more time and an overnight stay are essential when teambuilding and reflection are necessary.
3. With a timeline set, create an agenda. The first and last agenda items are very important, and will vary depending on the retreat purpose. Establish a time budget for each retreat activity, and be mindful of the sequence of events. Don't try to cram too much into a retreat because that dilutes the focus. Also remember that some activities may take longer than you expect, so include buffer time in the agenda. Also include time for fun during teambuilding and stargazing retreats, and schedule breaks every 60 to 90 minutes. Maybe it's the coffee, but I have found participants want more frequent breaks in the morning.
4. Consider preliminary activities. These may include personality profiles, visioning exercises like writing a future newspaper headline, or studying prereading materials. The more advance preparation by participants, the better the outcomes.
5. At this stage, clarify your desired retreat work products. Recording information on flip charts during the retreat works well, but you'll still need someone to be responsible for recording

miscellaneous notes and aggregating everything into a cohesive report of retreat outcomes.

- 6. Finally, decide who will facilitate the meetings; this is typically the group leader. The main shortcoming of a DIY retreat is that a leader who facilitates cannot be a full participant, but this can be partially overcome by rotating the facilitator role among several group members.

I recommend two final things to maximize a retreat's value. The first is for participants to complete an anonymous evaluation of the meeting before leaving the retreat venue. The second is to promptly -- that is, within 7 days -- distribute retreat notes to participants. You'll know you had a successful retreat when participants ask about the date for the next one.

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Happy New Year!

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