

## Successful Retreats That Get Results

By Mary Abbajay

The offsite retreat. Some people love them. Some people hate them. And it's easy to see why. If done well, retreats can be a powerful way to help organizations bring about positive change. If done poorly, retreats can be a waste of time and can actually make things worse. Holding an effective retreat is hard work, but organizations can get a leg up if they follow some basic rules.

### More than just a meeting

A retreat is an offsite gathering of a group of similarly engaged people – co-workers, team members, managers, board members – with the purpose of digging deeply into issues. The gathering is often held offsite so that the group can focus and not be distracted by the goings on in an office or by their day-to-day life. Retreats are an opportunity to bring people together to have conversations that they don't normally have.

### When retreats can help

There are lots of reasons organizations hold retreats. Sometimes they are held to solve a problem, sometimes to explore a new strategy, sometimes to evaluate, sometimes to train; it depends on the objective and the company's need. Leaders should seriously consider using a retreat when they want the support, input and creativity of their organizational members or partners. A well-designed and well-facilitated retreat can be very effective in:

- Helping change a strategic direction
- Dealing with sources of conflict and confusion
- Generating creative solutions for entrenched problems

- Getting people on the same page and pulling in the same direction
- Improving working relationships and increase trust
- Creating a common framework and point of reference
- Fostering a collective vision
- Generating honest and enlightening conversations
- Helping people feel heard in issues that are important to them

**That said, here are 7 excellent reasons for holding an offsite retreat:**

1. **Explore serious organizational concerns or obstacles.** Suppose productivity is low or turnover is high, retreats can be a great avenue to explore causes and potential solutions for thorny organizational issues.
2. **Tap into group creativity.** Retreats are a great opportunity to tap into the collective wisdom and creativity of a group. Taking people out of the day-to-day parameters of office life can greatly increase the creative process.
3. **Tackle tough decisions.** No matter how strong the leader, tough decisions will require the sup-

port of organizational members. Involving members in the decision-making on critical issues can result in high quality decisions with large-scale support.

4. **Create a collective vision of success for the organization, department, team or group.** Day-to-day organizational life doesn't hold much time for big picture thinking among and between organizational members and groups. Often, tensions arise as different players have different goals and priorities. Retreats are a great way to align and design different parts of an organization with a common vision and commitment.
5. **Explore and foster change.** Whether you need a change in culture or a change in business processes, retreats are an effective way to explore and promote new ways of doing things. This can be especially important for leaders who are considering change. Getting input and involvement early in the change process will greatly increase the odds of creating successful change.
6. **To improve organizational relationships and align members' behaviors, attitudes and perceptions.** Organizations are complex social structures. Sometimes relationships, behaviors and attitudes go awry. A well-designed retreat can go a long way to explore, align, and improve relationships, behaviors, attitudes and perceptions.
7. **Evaluate or correct your course.** Sometimes the most effective thing an organization can do is to simply take a breath and a 1000-foot view of how things are working. We call this the temperature check. What's working well? What could be improved? Providing people with an opportunity to play a role in deciding what needs to change (or not) is an excellent way to build support and commitment for organizational goals and priorities.

## When retreats won't help

There are, of course, lots of bad reasons for holding a retreat. Even though well intentioned, your reason may be not be sound. Here are 7 bad reasons for holding a retreat:

1. **Tradition.** Many people think that annual retreats are a good idea just because they've always done one. They think just the act of bringing people together is a good idea. But having a retreat without a serious purpose is a bad idea. A retreat is not a party or a picnic. People don't generally appreciate having their time wasted. Pointless retreats will breed cynicism faster than you can imagine.
2. **Making an individual problem a group problem.** Oftentimes leaders have a few non-team players and they decide a retreat is the best way to deal with these issues. Resist that urge. While an offsite can be a great way to surface and negotiate differences, the issues raised in a retreat should be germane and actionable to everyone in the room, not just a select few.
3. **Talking at participants instead of with them.** Retreats are not a one-way conversation. Retreats are not the appropriate venue for lengthy presentations or agenda pushing. While it is important to keep people well informed, daylong presentations do not constitute a retreat. People associate retreats with participation and change. Don't confuse or mislead the participants.
4. **Retreat as reward.** Many organizational leaders want to use a retreats as a way to reward hard work. This is a mistake. People rarely see retreats as rewards. Because they are likely to have even more work as the result of a day (or two) out of the office, attending a pointless retreat will not foster a sense of gratitude. If you want to reward employees, have a picnic, or give them a bonus.
5. **Improving morale.** A retreat in and of itself is not going to improve morale. While using a retreat to explore morale issues and improvement ideas, do not confuse the diagnosis with the

treatment. In fact, holding a retreat can actually worsen morale if action isn't taken from ideas or concerns raised in the retreat.

6. **The covert agenda.** This means not putting real choice on the table. People view retreats as an opportunity to provide real input on real change. Leaders will sometimes use a retreat as a way to “get buy-in” on an issue in which they have already decided. But it is dangerous to involve participants in a retreat on an issue that is already decided. Do not use a retreat to push a covert agenda or give people a false sense of participation. This will create a sense of ill will that will take years to overcome.
7. **No intention (or ability) to follow through or act on participants' suggestions.** When you ask people for their input, you raise expectations that this input will be implemented in some way. Do not disappoint them. Also, be wary of holding retreats where the topics are out of your and/or their sphere of influence or control.

### Successful retreat planning

Now that you know why (and why not) to hold a retreat and what you can expect to get out of it, you have to take the time to design and execute one. A good retreat can improve communication, energize and motivate, improve engagement and or improve skill sets. A bad retreat can make matters worse. Good retreats require weeks, if not months, of solid planning in order to be effective.

Sadly, most people groan when they hear their organization is holding a retreat. Many people have had terrible experiences with retreats or imagine them to be as bad as their company meetings. Very few organizations do retreats well. Heck, most companies don't even do meetings well, let alone plan and execute an effective retreat, so you can't really blame people for their attitudes.

But by following some guiding principles in designing your retreat, leaders can plan and execute an effective offsite.

- **Know your objective and goals.** Retreats should be designed and conducted in order to create organizational action or change, with a distinct goal in mind. Everything at the retreat, from participants to location to design, must fall from your specific retreat goals. Ask yourself: What will be different as a result of this retreat? What will this retreat create?
- **Be realistic.** A one-day retreat with 30 people goes by pretty quickly, so try not to bite off more than you can chew. Keep your agenda proportionate to the length of the retreat and to the number of participants.
- **Invite the right people.** Once you have your goals established you need to think about who you need at the retreat to accomplish those goals. Invite the people with the power, influence and information you need to reach successful results. Participants should also be involved in planning whenever possible. People always support what they helped to create.
- **Market the retreat wisely.** Retreats carry a lot of baggage and expectations and people are naturally skeptical. It is essential that the project is announced properly and openly. And make sure both those who are invited and those who are not invited all have a common understanding of the purpose and process of the retreat.
- **Keep it focused.** Retreats must relate to the actual day-to-day work of the organization. Don't wander.
- **Keep it organized.** Retreats must have structure and purpose. And you must know the message you want to deliver and stay on it.



- **Follow-up.** This is, without a doubt, the most critical determinant on whether a retreat is deemed successful and effective. It is also the number one thing that most retreat conveners fail to do. Transparent follow up and follow through is absolutely essential.

## Leading the retreat

In order to be effective and successful, your retreat will need someone to run it. That person may or may not be your company CEO, president, or manager. Very often, companies call in a professional facilitator to plan and execute the retreat. This is smart for many reasons.

First, a facilitator is a professional process expert but is a neutral party. Because leaders or employees have an enormous stake in the outcome of the retreat it is often difficult, if not impossible, for leaders to remain content neutral. Facilitators can also help plan and organize the retreat. They will focus on helping to foster innovative conversations, not on directing content. They will help surface different perspectives in ways that is often difficult for leaders to do. A trained professional will be able to help you think through different methodologies and conversation tools.

Another advantage to using a professional facilitator is that it allows the leader to be a participant. This helps people feel more comfortable in raising differing viewpoints if they see the leader as another participant, and in some ways a peer in the meeting.

Participating rather than leading is often difficult for a leader to do, but they should strive to use the retreat as a true opportunity to listen and learn.

Whether the leader facilitates the retreat or is active as a participant, he or she should:

- **Provide space for others to speak.** In other words don't dominate the discussion. Be careful about "leading the discussion."

- **Be honest.** Tell people what you think. Just be aware that your opinion will naturally carry more weight and might make people hesitant to disagree.
- **Invite opposing viewpoints.** Acknowledge and appreciate those who offer up different perspectives and feedback.
- **Be realistic about what can and/or can't be changed.** The point of a retreat is to effect change. If the participants start creating strategies that you know can't be implemented—then be honest and say, "sorry, that idea will never fly with the board."
- **Work the room.** Use the retreat to work and converse with people whom you normally don't get the opportunity to collaborate with.
- **Show appreciation and gratitude.** And remember to tell people what you learned as a result of their candor and participation.

Given a clear purpose in mind, and when planned and executed correctly, an offsite retreat can be an incredibly effective, energizing and engaging tool for your company. Just remember to follow up!

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