Leadership Off-sites that Produce Insight and Action

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As you leave the CEO’s office and head down the hall, you scowl slightly and wonder again why you took this staff VP role. You are used to running line operations, not senior management off-site meetings. As a high flyer seen to have top executive potential, you agreed to a two year rotation as the VP for strategy. It would be a good developmental experience. Included in your portfolio is the responsibility for planning the annual retreat for the top 60 officers of the company. As one of those top 60, you’ve suffered through these meetings in the past, groused about them to colleagues, but never thought you would be responsible for them. Until now. Time to stop complaining and start doing something about them. But what?

You start thinking about what you’ve seen go wrong in the past. There was the “death-by-PowerPoint” meeting in which there was a 2 day parade of 55 minute presentations followed by 5 minutes of stilted Q&A. There was the meeting that had a “social” focus – lots of golf and good food – but very little business content or impact. There was the “squeaky wheel” meeting, in which it seemed like the agenda was given over to a hodgepodge of staff programs and pet projects, with staffers wanting to showcase their wares.

It seems like these meetings never deliver the value they should. How can you make the next one different, valuable, and worth the time and money spent on it. How can you make it an integral part of how the senior executive team leads and energizes that top 60?

First things first – get clear on the objectives

A great off-site has its beginnings with well crafted objectives for the meeting that the top leadership team is committed to achieving. These become “true north” for the off-site, the standard against which every urgent staffer request for air time or outlandish team-building idea is assessed.
Build an initial draft of meeting objectives, and consider who else to engage in reviewing, revising, and supporting these off-site objectives. Informally enlist their ideas and critique. Do this both for the good ideas you may get, as well as for the benefit of involving the people who will be at the off-site. If they help craft the objectives, they’ll be more invested in being sure the off-site achieves those objectives.

Remember, the off-site objectives should drive every other decision about the off-site! They will influence where you do the off-site, how many days it will cover, who should attend, and how much preparation time and resources you will need. So get started early with this step, ideally, as much as 3-4 more months before the actual meeting.

**Questions for crafting meeting objectives**

- In what ways does this off-site meeting contribute to your decision-making processes (e.g. strategic planning, annual goal setting, talent and organization planning, etc.)?
- Does the off-site follow after strategic planning, and support how you work through coordination issues and priorities between the business and various functions?
- Is it working in sync with other things you are doing to implement changes? Is it part of the broader communication plan?
- How can it serve your larger, on-going leadership agenda?
- Is this a practical list? - given the number of days you are willing to allocate, is this a realistic set of objectives? Or are you trying to “solve world hunger” in two days?

**Who’s off-site is this, anyway?**

This may seem obvious, but it is an important consideration. You want to be clear on who “owns” the meeting, that is, who will be seen as the sponsor of the meeting (whether they like it or not). Usually, it is the top leader – the business unit president, CEO, functional SVP, etc. – who will be seen to be the “owner” of the meeting, unless you are explicit about who is the sponsor. A leadership team may decide that it owns the meeting, collectively. While this can mean extra work getting the team aligned before the off-site, enlisting the team in advance will improve the odds that the meeting will achieve its objectives.

Leaders sometimes underestimate what an important, and potentially defining, leadership moment such off-site meetings can be – for better or for worse! Invited participants assume that everything that happens, everything on the agenda, is there because the most senior leaders wanted it there. They expect to hear from the senior leaders, and they often are interested in the senior leaders’ reactions to what happens and what is discussed at the meeting. Be sure your senior leaders appreciate both the opportunities and risks that such meetings present. And be sure to design the meeting in such a way as to help them make the most of their leadership moments.
How can the meeting design improve the odds of having a great off-site meeting?

Meetings that have impact engage people - their minds and their hearts. Think of the few off-sites you’ve been to that really made a difference, off-sites that truly accelerated lasting, positive changes in your company or organization. What happened? Chances are that these meetings demonstrated a few important meeting design principles:

**Off-site Meeting Design Principles**

<table>
<thead>
<tr>
<th>Connection before Content</th>
<th>People are encouraged to “connect” with each other, informally and personally. This happens early and often. If the meeting participants are to do any “real work” with each other at the off-site (e.g. make new organizational arrangements, commit resources, etc.), this foundation of personal connection is essential.</th>
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<tbody>
<tr>
<td>Conversations, not lectures</td>
<td>There is lots of conversation, and little lecture. The core principle here is that people typically learn more, and change more, when they have to formulate and express their ideas, not just listen to the ideas of others.</td>
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<td>The right people</td>
<td>The “right” people are in the room. Building and paring the invite list for most off-sites is a challenge, and invariably additional people get added for political reasons. But be sure that enough of the right people are there – the ones with the knowledge, the power, and the influence to accomplish the meeting objectives - and the ability to bring the rest of the organization along with the new direction when they return to work. Be careful not to dilute the meeting with too many who are not well positioned to help.</td>
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<td>An off-site is more than a list of agenda items</td>
<td>There is a coherent arc to the meeting, an overall story line. Each step of the meeting builds toward the next step, serving the overall objectives and deliverables. You get the sense that it is well choreographed, that there is a good reason for everything that is on the agenda.</td>
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<td>The “how” says volumes about the “what”</td>
<td>How the meeting is conducted is in sync with the messages delivered at the meeting. For instance, if the message is that senior management wants ideas and input from the next levels of management, then lots of time at the meeting must be devoted to eliciting ideas, and demonstrating that (at least some of) the ideas will be acted upon. It isn’t, “55 minutes of slides with 5 minutes of Q&amp;A.” Careful design helps the meeting itself “walk the talk.”</td>
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<td>The off-site began before it started, and finished well after it ended</td>
<td>There is pre-work and communication that prepares you to be most effective in your time together, and there is follow-up after the off-site that helps assure that things committed to at the off-site are accomplished and integrated into your on-going work.</td>
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<td>Meeting design comfortably fits</td>
<td>The meeting is fast-paced, yet it doesn’t feel over-stuffed. There is time to accomplish what the meeting has set out to accomplish. Too</td>
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often meetings have the proverbial 10 pounds stuffed into a 5 pound sack. The net result is that everyone is frustrated – those who lead agenda items, as well as those attending. Meeting sponsors have to be ruthless about saying “no” to requests to add agenda items, and about protecting the integrity of the meeting design.

Manage “meeting fatigue”

There is some attention to engaging you physically. You don’t spend all three days sitting in the same chair. It may be organized activity, or just free time, and it comes at a time when you need it. The physical breaks recharge you for the work that follows.

Don’t underestimate aesthetics

The meeting space is conducive to the work on the agenda, with appropriate break-out space, good sound and sight lines, comfortable chairs. These can sound like “the little things,” but when they go wrong they can provide a major distraction.

Use these principles to develop an off-site meeting design, and to check designs that others offer. While these principles guide your meeting design choices, they don’t prescribe what specific activities will give you the greatest likelihood of an off-site that really delivers. That comes next.

**Getting creative**

There are dozens of effective and engaging ways to accomplish off-site objectives - clustering people in smaller discussion groups, electronic “secret ballot” surveying, hands-on projects that help drive home key points and build relationships, panel discussion formats, customer speakers, and so on. Of course, the choice of methods is guided by your specific off-site meeting objectives and the design principles above. No matter how “cool” the method is, it has to be a “best choice” to serve off-site objectives and design principles. While splashy methods can make a meeting memorable, they are ultimately only worthwhile if they are hard-wired to delivering on the meeting objectives. A good off-site meeting designer and facilitator can help you develop what is right for your meeting objectives. Examples from our own client experience (see below) give a sample of how design ideas fit with off-site meeting objectives.

**Off-site meeting for Top 50: Operational Excellence**

*Situation:* Our client had grown rapidly in its highly technical and capital intensive field, from a focused, entrepreneurial pioneer, to now becoming a leading player in the industry with complex, multi-billion dollar capital projects and operations. They realize that at their size and
scope, they need to operate with greater discipline, and coordinate more effectively. The move to becoming “operationally excellent” would be a difficult cultural shift. This shift was to be the focus for the upcoming leadership conference for the top 50.

**Off-site meeting objective:** Help attendees become much clearer about what “operational excellence” looks like, and what the implications are for how they lead the company. Engage them like we want them to engage with their employees (let the meeting design model the culture we want to move toward). Help them become willing to take a fresh look at a business that they know well, and to consider that they may need to lead in a new way, if they want to get different results.

**Design solution:** After a brief kick-off by the CEO and COO, we immersed all 50 into the task of assembling 30 bicycles in only 70 minutes of actual assembly time. The idea was to give them a familiar task, something they had likely done before on a much smaller and less complex scale, and ask them to accomplish that task in a new way, at a much larger scale and complexity than they had ever done before. We did this experience before we ever got in to the specifics of the challenges of their own culture shift and what it would take to become operationally excellent. We would get into those specifics, on the next day of the meeting. Through building the bikes, they experienced, first-hand, the challenges of having to learn to do something familiar in a new way, under performance pressure, trying to evolve an organization that could get the task done in an operationally excellent way. The exercise did its job. The next day, truly breakthrough discussions were held, at a level of candor and purposefulness that they had never experienced at senior leadership conferences in the past. And the bikes we donated to the local Boys and Girls clubs.

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**Off-site meeting for Top 250: Customer Focus**

**Situation:** Our client has 10 geographically-based business units, spread across four continents. They annually bring their top 250 or so leaders together. The business units operate fairly independently, but this year, the top team wants every business to strive harder to differentiate through “customer focus.”

**Off-site meeting objective:** Help business leaders understand what “customer focus” is, how it is different than what they already do, learn methods they can use, and commit to actions within their business unit.

**Design solution:** In a departure from what is normally a day and half meeting full of diverse presentations, our client devoted a full day exclusively to the customer focus agenda. The CEO began the session, making the case for why this mattered to every business unit. Then, best-selling author and practitioner Richard Whiteley led an interactive session on achieving greater customer focus. Two customers then took the stage to discuss their experience with our client’s customer focus efforts, and their experience with competitors as well. After lunch, attendees had the choice of participating in 2 of 10 “elective” break-out sessions, in which “good practices” for customer focus were profiled by practitioners from several of the 10 business units. After these sessions, business unit leadership teams convened to reflect on what they had learned during the day, and what they would do to integrate ideas into how they led their business.
**Practical matters**

Get help. This is a bigger job than you might think. Don’t go it alone. There are three important ways to get help:

| Off-site planning team | Consider engaging a small (4-7 person) team to be your “design team” for the off-site. Comprised of people who will attend, but not necessarily the top team, this is the group you will use to give you feedback on the early meeting design draft(s), and on other matters related to the conference (e.g. the invite list, what to communicate to those not invited, whom to put in speaking roles, etc.). They will help you avoid mistakes, represent different meeting stakeholders, and their early participation will usually make it easy to recruit some of them for further help as the off-site date approaches. |
| Off-site meeting design & facilitation consultant | The higher the stakes, and the more complex the objectives and agenda, the more you will want to have a professional off-site designer/facilitator. This consultant will guide you and your team through the whole process of nailing down a realistic set of meeting objectives, crafting a creative and powerful meeting design, preparing people who will lead agenda items at the meeting, and providing on-site facilitation at the off-site. By having an on-site facilitator, you will be more able to focus on being a true peer and participant at the meeting. |
| A meeting planner | Use a meeting planner, or draft a person on your staff who can fill the same role. The meeting planner handles all of the logistics for the off-site – booking the conference facility, assuring hotel space, arranging meals, communicating with participants about travel arrangements, assembling and sending pre-work, etc. An important, and sometimes time consuming role. |

**Concluding thoughts**

The most expensive part of any leadership off-site is the time of the attending leaders. A few days at an off-site is an investment, and should have terrific paybacks. With careful forethought about the meeting objectives, a quality meeting design, excellent on-site logistics and facilitation, and disciplined follow-up, it will.