

5 Tips for a Successful Leadership Offsite

How to avoid wasting time in ineffective meetings

By Mike Gospe

How much does it cost to hold an offsite with your leadership team? More than you might think if the offsite isn't carefully planned. It's not just the physical costs; it's the opportunity costs. Consider that this is the one place and time that has every member of the leadership team in attendance to discuss the strategic issues facing your company. Yet, executives report that they spend a significant amount of time in offsites that are poorly run and do not produce meaningful results. This is especially true when the offsites are meant to focus on complex issues like:

- What's our competitive advantage, and how do we defend it?
- Should we focus on five market segments or only two?
- How do we ensure our products are ready for market so that they result in satisfied customers?
- How do we balance our bookings target against competitive pressures?
- Operating under resource constraints: Are we trying to do too much?

Instead of productive discussions that lead to agreement and actions, the team becomes distracted by topics not on the agenda (i.e. trying to problem-solve operational issues or getting sidelined by small tactical items). It doesn't take many of these ineffective meetings to derail strategic conversations, stagnate decision-making, and frustrate your team. The best way to avoid this pitfall is to structure the offsite to keep the team focused, constructive, and on track. I've been facilitating leadership offsites for more than 10 years. Here is one example of a proven model; while agendas will vary, the structure has proven powerful over and over again:

1. Prep-work & Priorities

For best results, the leader needs to leave his or her ego at the door. If the leader dictates the discussion and the outcome, then there is no point to holding an offsite. To harness the full power of the staff, there must be shared ownership. Leaders can encourage this by asking all team members

to prepare for the meeting (and not just parachute in). One way to do so is to invite all attendees to *list and describe* the strategic issues they want to discuss, even if the leader already has an agenda in mind. The leader collects this input and molds it into the final agenda, assigning specific topics to the individuals who requested them. Those individuals then become responsible for framing the conversations on his or her requested topic.

2. Rules of Engagement

For strategic offsites to be productive, a small set of rules must be followed. Here are a few common rules of engagement. They are quite simple, yet they are frequently ignored. Do so at your own risk.

- The offsite will start and end on time.
- The objective for the day is clearly stated (i.e. “To review, revise, and refresh our business strategy”; or “To develop “policy statements” to guide strategic thinking”)
- Specify what topics are not allowed today (i.e. “The purpose of this offsite is not to review operational plans, talk about tactical issues, or problem solve.”)
- The agenda is made up of discussions, not presentations
- “All badges on the table” – meaning that everyone is an equal at this meeting
- “Turn your cell phones to stun.” Don’t allow distractions and multi-tasking to disrupt the discussion

3. Visualizing Success Exercise

When it comes to offsites that explore the strategic direction for a company, it’s helpful to find out what success means to the individuals. I use this exercise as an ice breaker at the beginning of the meeting to get their creative juices flowing and to invite attendees to be innovative and think differently:

- Break the team into small groups of 2-4 people
- Premise: Two years from now your company will be on the cover of TIME or Forbes (or magazine of your choice)
- What’s the headline? What’s on the cover? And, what’s the article about?
- They have 15 minutes to sketch their cover on a flipchart. Then, 20 minutes for sharing their output

When conducting this exercise, it’s interesting to look for threads of

commonality and differences between the teams. It will become immediately clear how aligned the individuals are by the end of this exercise. The rest of the offsite agenda can be tuned to address any alignment issues that may require attention. The sketched magazine covers stay up on the wall throughout the meeting. You'll find that team members will constantly refer back to them as the agenda unfolds throughout the day. It can be a powerful unifying force.

4. A Structured Agenda

The most effective agendas are structured, yet flexible, running between 8:30 – 3:00 pm. Why not longer? Because people get tired, and when they get tired the quality of their participation diminishes. Of course, some offsites run much longer, and this is fine. When they do, allow for plenty of breaks and include another creative exercise to revive the team in the afternoon. Regardless, I've found that the most creativity and highest energy are found at the beginning of the day.

As I mentioned earlier, the agenda is made up of a series of discussions, not presentations. A typical agenda may include four or five discussion topics. Each topic may require one or two slides to set up. Then, it should focus on a single question for the team to explore. Discussion topics may run between 30 – 60 minutes. If they run longer, consider breaking the topic into two sub-topics. This keeps the momentum going for the agenda without feeling like the team is stuck in Bill Murray's "Groundhog Day".

5. Hire a professional facilitator

Running a successful offsite yourself isn't as easy as it sounds, especially when you need to balance managing the meeting while actively participating in it. Partnering with a professional facilitator can help do both. A good facilitator will provide the following value:

- Ensure the meeting starts and ends on time
- Allow equal participation from all team members (so one person doesn't dominate the discussion)
- Use flipcharts to track the conversation

I believe the single, most valuable contribution a facilitator makes is in being able to summarize each discussion by distilling the many points into a crisp "policy statement" that addresses the strategic topic. A good business-focused professional facilitator will be able to see the path through the forest and offer a conclusion. In addition, a quick-minded facilitator will be able to

recommend obvious (and not-so-obvious) action items.

If you follow these steps, by the end of the day the leadership team will leave feeling and knowing that the offsite was an excellent use of their time.

ABOUT THE AUTHOR

Mike Gospe is a professional facilitator with expertise in working with leadership teams and [Customer Advisory Boards](#). Mike is also the author of the popular [The Marketing High Ground](#) series of guidebooks for B2B marketers. He co-founded [KickStart Alliance](#) in 2002, a sales and marketing leadership consulting team. Fortune 500 and start-up teams have partnered with KickStart Alliance to define go-to-market strategies and strengthen marketing-sales alignment.