

Team, RETREAT!

How To Make an Off-Site Meeting Deliver Real Value

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TEAM, RETREAT! OR TEAM RETREAT

The email arrives from the boss, “block out a couple of days for an off-site team retreat.” What image comes to mind? A) A bedraggled corps of soldiers taking cover from a relentless siege of enemy fire and sleepless nights – RETREAT! or B) A serene collegial gathering around a fire, glasses full and raised in a toast to the team’s most recent triumph in the marketplace?

In either scene, making the most of time away from the everyday work setting requires clear objectives, having the right people in the room, developing shared behavior norms, commitment to action, and follow-through. In this article I share my Team Coach questions and techniques to squeeze every ounce of value from your next team retreat.

Set Clear Objectives

An off-site meeting provides time away from the playing field of daily work. It may be just what your team needs to deepen collegial respect and tackle

vexing business issues. To ensure that the off-site team retreat adds value consider why being away from the office is important. Can you accomplish this work at the office?

Set Objectives key questions:

1. What issues or challenges must be discussed together to drive results at work?
2. How will getting away from the office help your team?
3. What outcomes must be achieved to justify the investment of time and money?
4. Is the content of the meeting robust enough to merit the time and energy to be away from the office?

Remember the venue does not *define* the outcomes. It *does* contribute to the energy of your team. Make the choice that best serves your objectives.

WHO NEEDS TO ATTEND?

A Team retreat is 80% business meeting and 20% social event. Take the guest list seriously. Consider who needs to be in the room to make things happen and get real work done. A well-managed

team retreat is a potent crucible to strengthen interpersonal relationships. The less formal setting can make difficult conversations easier to broach and more candid.

Look at your objectives. Does the attendee list include the people best positioned to achieve your priorities? Who else holds a critical piece of the puzzle? Too often leaders regret leaving one or two people off the list. “Sales should really be here,” the marketing director realizes as the team discusses tactics for a new product. They find themselves unable to resolve an issue or to get needed agreement on a pressing problem.

- Participant list key questions:*
1. Whose collaboration does your team need to get its work done well?
 2. Who are your key internal customers?

The retreats that deliver the highest value are those that resolve *substantive problems* and advance *real work*.

Commit to measure the return on your off-site investment in time on task, expenses reduced and/or revenue growth. Be careful not to turn your off-site meeting into a town hall meeting or

pointless gathering that wastes time and breeds cynicism.

Tip: Hold a pre-retreat meeting with stakeholders who cannot attend the retreat. Solicit their input on critical topics that will be discussed by your team. Your team then has valid, timely information to guide retreat discussions.

ESSENTIAL ROLES

Skilled meeting facilitators are vital to a successful retreat. They manage time and focus the team on required outcomes. A skilled facilitator will ensure that the structure of the meeting serves the objectives set by the leader. To optimize your team’s performance engage a Team Coach to build the fundamental skills needed to deliver exceptional results. Your team coach provides immediate feedback to build each “player’s” talents and abilities. Your Team Coach is a trusted truth-teller. A Team Coach with sharp facilitation skills allows all attendees to focus exclusively on the topics and tasks at hand. The team gains value on two levels:

- 1 - the content of the meeting will be managed effectively and

2 - positive behaviors will be reinforced while negative behaviors will be called out and modified.

Team Coach key questions:

1. Does your team have problematic patterned behavior that detracts from results?
2. Is the team prepared to build discipline so excellence becomes business as usual?

BEHAVIOR NORMS

Remember, getting the team away from the office does not guarantee that they will behave differently. In fact, the lack of structure may make some of your best performers *less* effective. Establish *behavior norms* at the start of your meeting as a contract for success. Each *norm* describes a specific behavior of a high performance team. A simple question helps determine if the norm is truly a *behavior* or merely an intention. “*Can it be videotaped?*” If the answer is yes, than the norm describes an observable behavior. If the answer is no, it is likely an intention. A common example is “*we need open communication.*” Probe further - how will you know if “open communication” is happening? The aspiration of “open

communication” becomes actionable with specific behaviors: “*We will let each person complete their sentence and not interrupt.*” OK, *that* we can get on videotape. Remember, *behavior* is where change is experienced within a team.

Behavior Norms key questions:

1. What top two behaviors are needed to ensure that this retreat is successful?
2. What is the biggest behavioral barrier at work and how will you change this on retreat?

PROCESS CHECK

Often the behavior norms that make the list are *not* happening at work. With the behavior norms in place and agreed to, it is time to start measuring performance. The Team Coach calls for process checks at intervals throughout the retreat. Conduct these process checks without debate. Just gather the information.

Process Check key questions:

Each person rates compliance, using a 1 = low to 5 = high scale.

1. How well are we adhering to our behavior norms?
2. How well am *I* adhering to our behavior norms?

The sequence of questions is important. Individuals often rate themselves higher than they rate the team. If we follow this logic, the *team rating* should also be high. This discrepancy invites candid conversations about perception, assumptions, and accountability.

Tip: Schedule an extended break if members of your team are in the midst of a crisis. Anyone not on the Beth Kerr Page 4 1/28/11 break is part of a sub-team to move other topics forward. Reconvene with a report out.

TAKE NOTES!

If getting people into the same room were all that were needed to crack those vexing business challenges, retreats could be extended cocktail receptions. Chances are the tougher conversations will not take place without putting them on the table and providing structured ways to hear all views. The Team Coach will make sure you do the tough conditioning – the wind sprints – of your team’s work. It is critical that you create a record of the salient points!

Determine the best structure for taking notes and stick to it! Having key points recorded and visible in the room curtails

the repetitive advocating that wastes time and gets you nothing but “violent agreement” thirty minutes later.

Capture Ideas key questions:

1. What is the best mechanism to capture key ideas?
2. What will be most useful when we are back at work?

Spare the trees and have a note-taker poised over the keyboard to project ideas as they emerge. Many companies use visual practitioners and graphic art techniques to capture the flow of conversation in an entertaining way.

Visit YouTube to see an example of this technique in a 10-minute video of Daniel Pink’s *Drive*.

Tip: A graphic facilitator can be hired for \$1,500 upward. Check with a technical college in your area – you may find a student eager to support your meeting and build a portfolio.

However you decide to capture ideas, keep the note-taker role separate from the Team Coach/Facilitator. You want the Team Coach to be focused on dynamics and behavior. If they are staring at a computer screen or writing on an easel with their back to the group, you forfeit considerable value.

CELEBRATE SUCCESS

We know that what we *do* influences attitudes and perceptions far more than what we *say we do*. An extended team retreat brings your leadership behavior into sharp focus. Make it work for you. Take time to identify how each member of your team adds value to the enterprise. During the retreat make a point of delivering that message directly to the person. Do not underestimate the potency of sincere appreciation. When times are toughest is often when a focused and authentic word of thanks acts like a potent infusion of drive. It can infuse a team with renewed vigor to crush tough challenges. The Team Coach has a perspective from the sideline that can crystallize strengths and weaknesses in your team's ranks.

Kudos & Information key questions:

1. What is a recent win that should be celebrated?
2. What is one behavior, contribution, achievement that I want to acknowledge and reinforce?
Consider this for each person attending the retreat.

TAKE ACTION

Working with successful professionals reaffirms the principle that “the world

rewards action.” Too often a retreat ends with a statement from each person that is more *desire* than *commitment*. Desire statements are easy to identify. They typically start with “*I will try to*” blah blah blah. For a few brief moments colleagues share a sense of hope. They listen as each colleague vows to change the annoying behavior that undermines team effectiveness. “Oh, finally!” Connie thinks as she listens to Steve vow to truly listen better, “Steve is going to listen to me and not interrupt me!” The next team meeting when Steve cuts Connie off in mid-sentence, you can expect a dramatic spike in her level of cynicism. Better if Steve never vowed to “*try to listen better.*”

A Team Coach brings more rigor to the commitment process. Each commitment has to clearly connect to team and business work. How does it contribute to better results? A statement made by a leader, who vows to “communicate better,” does not pass muster. When that same leader commits “to speak after listening to your ideas so I don’t influence the direction of the conversation,” the team knows exactly what they can expect from that leader.

To close the retreat each person states his commitment and requests specific support from the team to keep him accountable to the change. If others know what you are working on and that you will benefit from their support, your follow-through and commitment to make the change rises dramatically. Having a Team Coach attuned to each person's priority behavior change is one more support to accelerate real and lasting behavior change. As the person acts consistently with their commitment the team's acknowledgement and appreciation creates a reinforcing cycle and everyone benefits.

Tip: Download a free behavior change commitment form from www.glimmerglassgroup.com

LEADER AS TEAM CAPTAIN

The leader of the team closes the retreat with a personal commitment statement in addition to the behavior change commitment. The leader declares what she *will do* to ensure that the retreat momentum is sustained. This is critical. The boss can often dismantle obstacles for the team through one conversation with a peer.

Leader Commitment key questions:

2. What is the single most important "to do" on your list that will transfer accomplishments from the retreat back to work?

FOLLOW-UP!

In the same way that the retreat work started well before you arrived for the retreat through the setting of clear objectives and determining the attendee list, retreat work extends beyond adjournment. The Team Coach continues to provide feedback and follow-up. The behavior norms remain in place and continue to be expected in all team interactions. During the weeks following the retreat the Team Coach reinforces the "playbook," individual commitments and behavior norms created during the retreat. This brings the fundamental skills from the practice session into play when they matter – on the real field of work.

Use these tips to make your next team retreat worth every dollar of your company's investment and every minute of your team's time.

Get a Team Coach on your side to raise your game and build a winning team!

About the Author

Beth Kerr, MBA, is managing director of Glimmerglass Consulting Group. Her work as a team coach contributes to productive behavior norms that create real business value for her clients.

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