

How to Plan Amazing
Off-Site Retreats Using

Compression Planning[®]



Dear Leader,

Are you confronted by a critical issue that could be addressed most effectively in an off-site planning session by a few of your key people? If you are, the following White Paper could be good news. It is an accumulation of recommendations and insights gained from working with company presidents and other senior business and organization leaders for over three decades.

I'm sharing this paper...

1. To spur your thinking if you are considering an off-site planning session
2. To share hints for a well thought through session
3. To identify the hazards of a half-baked retreat

The McNellis Company specializes in designing and leading organizational planning sessions on critical issues. The Compression Planning® process, which we have developed over 30 years, is helping leaders such as you focus on crucial issues and squeeze time out of the planning process. We also teach clients how to use Compression Planning on their own.

Our team only does one thing – we help leaders plan effectively in the shortest time possible. In this paper I will share with you many inside secrets of our success.

Each of our client sessions is 100% custom designed. Virtually all are covered by confidentiality agreements, so I will not refer to particular organizations in the references used for illustration purposes.

This document is meant to open a personal discussion around your particular circumstances and planning needs.

Sincerely,



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Section 1

You, the Client



Section 1: **You, the Client**

Essential to a successful off-site planning session is mutual trust you have with the person you engage to lead the session for you.

Our assumptions about the reasons you need professional assistance are:

1. You want to hire someone whose expertise you don't have in-house
2. You recognize the value of a seasoned, neutral outsider who brings skill and objectivity to your project
3. You want to do a great deal of listening to your key people without the distraction of having to lead the session
4. You want someone who will work closely with you and your staff in handling all details from logistics, through design, to the follow-up report

In the most effective off-site sessions:

- The clients are clear in their expectations. They have compelling and specific purposes for the session, as well as clearly articulated and expected outcomes. They don't avoid an off-site because "we did it last year" or some other general excuse.
- They are deeply engaged in the design of the retreat. They don't do the detailed design work, but they are intimately involved in the design and have 100% buy-in to the process being used.
- They make themselves available. It takes a lot of work to finalize a design to make sure the time spent produces a "positive ROI" on the participants' time. These leaders say things like, "Call me anytime you need anything. Call me at home if you have questions. Call me over the weekend."

Effective clients make themselves available because they respect and understand all the intricacies of a successful session.

NOTE: If too much of the work is delegated to support staff, your planning probably will not succeed. The time and expense of an off-site is too valuable for the key leader and his/her close associates not to be intimately involved in the design.

Focus on and clarity of the purpose is essential!

Decisions to hold an off-site too often follow this pattern:

1. Decide on the date and amount of time
2. Decide on the location
3. Recruit the participants
4. Do a sketchy outline
5. Realize there is a lot to doing a retreat
6. Think about a facilitator
7. Someone fights having “an outsider who doesn't know our industry”
8. Contact a professional or amateur facilitator
9. Select someone to help you
10. Start to tell him or her all about your situation
11. Go into a design process
12. etc.

For maximum success the process should follow this pattern:

1. Do a preliminary description of your need
2. Select a facilitator where you are 100% comfortable with his or her ability to work with you – someone who has the skill, style and support systems
3. Initiate a design for the session (frequently this impacts who attends and the location)
4. Determine the participants
 - Absolutely [essential](#)
 - Really important they participate
 - Nice to have
 - The world won't stop if they do not attend
5. Select the date so the “absolute-must” attendees can attend
6. Determine how to recruit participants
7. Do a further refined design that will help you determine the length of time and whether an overnight is preferred
8. Find the appropriate location
9. Do detailed research based on the design
10. Develop the final design
11. Arrange for all logistics
12. Etc.

My experience is based from working with presidents, boards of directors, senior staff, senior staff plus management, and cross-sectional teams. The plan described above is applicable in virtually any situation.

Section 2

Planning Language



Section 2: **Planning Language**

How often have you sat in a meeting where people argue over whether something is a goal, strategy, tactic, vision, mission, key indicator, business plan or operations plan? Long term plan versus strategic plan?

If you ask 100 people what these terms mean you will get 100+ definitions. So, when clients say they want to update their strategic plan, I burrow in to find out what they really want. Successful clients insist on absolute clarity on objectives without a lot of fuss over words.

We do not bring our language and definitions to you. We work within your key terminology and definitions. We attempt to avoid debates about words and focus on the content of the issues, working them into a form that you can massage into your templates and formats after the retreat.

It is terribly debilitating for groups to have arguments over whether something is a vision, a mission, a charter, or simply a statement of differentiation.

We use language such as "key moves," and terms that spring from the group, words that everyone agrees on and understands versus debating over words.

Section 3

The Basic Concept of an Off-site Retreat



Section 3: The Basic Concept of an Off-Site Retreat

Leaders are so busy with day-to-day and operational matters they often don't set aside dedicated time to address key issues.

When you are planning for crucial issues:

- It is vital to get the right people
- Recruit them in such a way they want to attend
- Do your planning in the right location
- Focus 100% on a single question
- Expect high quality answers
- Drive for a high level of consensus and support of the key decisions
- Make a few critical commitments versus a laundry list of things that people know won't be accomplished
- Use an outside neutral professional to lead the session
- Use a structured planning approach (ours is Compression Planning®)
- Commit to an action plan to which people are truly committed
- Develop a communications plan that covers what needs to be transmitted to targeted audiences as a result of the retreat

My thoughts and suggestions about each of the above elements:

It is vital to get the right people

- No one may be sent to represent someone else
- Get the decision makers together so once a decision is reached it is made
- It is crucial key leaders understand others' point of view as well as their own
- Even if all participants don't agree with the outcome, it is important that they have been heard and their point of view understood. They have to respect the process of reaching key decisions and support them.
- Check schedules (business and personal) to guarantee everyone can attend
- Eyeball the calendar for timing to avoid Mother's Day, graduations, Bar Mitzvahs, Super Bowl, Thanksgiving, etc. You get the idea.

Recruit prospects in such a way that they want to attend

- Face to face, with an outline of the preliminary design and four to six reasons they are needed, is the best way to recruit (even if you have total control).
- People need to know the "why" behind the retreat and know the session won't be as successful without their total participation.

- People have questions, fears and concerns about retreats, and you need to alleviate them early.
- NEVER recruit by e-mail. Too impersonal.
- Notify their administrative assistants and other staff where they will be and that they will be out of touch except for emergencies.
- Notify spouses (in certain cases like trade association boards of directors) how to contact their spouses in case of emergencies.
- Try to arrange the schedule so participants aren't arriving from Australia or South Africa the night before the retreat.

In the right location

- Never hold a retreat on site.
- Stay away from the hotel across the street from headquarters.
- Get away. However far it takes to get away. Out of the area code normally, across state lines, 100 miles away for many groups is a reasonable guideline. An hour flight is best for others.
- Stay away from a plant site so you can't double dip your time and see some new application of the latest whiz bang technology. See it another time
- Las Vegas? No.
- Go where the best thing to do is focus on the topic you are addressing.
- Golf Resort? No. Golf on your own time.
- See the section on [checking](#) out a facility.
- Stay away from hunting cabins, lake homes, and other places that are not set up for hosting and handling high stress-level thinking sessions.

War Story: A meeting planner had 30 plus execs and top managers fly from New Orleans, Dallas and other parts of the US to Detroit. They took buses to Traverse City Michigan for the bonding experience of riding and eating box lunches.

The planner had not done a dry run before the event, so she had no idea people would be traveling for 7-10 hours. Chartered planes and executive buses sounded wonderful. Wrong. People arrived exhausted, hungry and angry. They should have flown into Traverse City or met somewhere more conducive.

100% focused on a single question

- It's normally a kiss of death to have other meetings as part of the retreat
- They take away from the focus
- It diffuses people's energy

- The best retreats don't sandwich in early morning, luncheon or late night meetings
- If your issue is important enough to have a retreat then hold other meetings before or after the retreat

War Story: Our team led a one day, pro bono retreat for a charity and three of their boards. Someone spontaneously called for the boards to meet over lunch. One board went an hour over schedule and cost the total group a lot of sitting around time.

Was the work of the small board important? Absolutely. However, by getting into a board meeting, they wasted everyone else's time and ruined the rhythm and energy of the total group.

Things worked out, but the president of the organization and our team were blindsided.

With the expectation of an answer

This sounds so simple; however, I constantly hear from people who say, “We had a retreat but nothing happened. Nothing was really decided.”

I do not think you should have a retreat to:

- Listen to reports
- Watch PowerPoint presentations
- Watch videos
- Do traditional team building exercises like climbing trees and river rafting
- Get to know each other better
- Do committee work
- Do micro work
- Do basic orientation
- Play with tinker toys and other such activities
- Play competitive sports

Other retreat activities

You are better served to have a retreat when it is the most efficient way to make a critical decision where high level collaboration is required for true implementation.

Organizations face too many crucial issues to waste the time of their key people doing anything other than addressing questions to solve those issues. Following are other activities often associated with high level retreats—some good, some bad.

- Send background reports ahead of time. Selectively edit them. One page is best. Two pages at most. Use great visuals to help. Get professional help.
- PowerPoint is so overdone people are turned off by it. When it is used, have someone who knows what he/she is doing help the presenter with type face, size and colors. I use it, but only selectively.
- When using a video have it cued up to the isolated section you want. You don't need to show the entire video. Have a professional there to assist you. Dry run everything.
- Traditional team-building activities like climbing trees and river rafting can be a phenomenal thing to do with a team in the formation stage and when building a much higher level performance group. However, I think such activities should be separate from retreats, especially strategic thinking sessions.
- Getting to know each other will happen during a retreat. It should be a by-product of a great retreat versus the purpose. With Compression Planning, we go to work fast in the retreat versus asking everyone to share an "intimate moment from his or her youth." Some people are anxious, if not terrified there will be "touchy feely" activities. Getting right to work alleviates that concern. You may be surprised how often it comes up.
- Committee work as part of the retreat. I hope this was addressed adequately; however, to reinforce the point: Do such work outside the retreat.
- Micro work during the retreat. Some people think a working session is a micro session. Someone should always say, "Is this the appropriate level of detail to be worked on during the retreat?" Amazing how some disciplines can get bogged down in details that are not helpful.
- Basic orientation. This is included for not-for-profit boards. I have some strong opinions:
 - Board members who need to be oriented to the basic role of a board should have it done privately or in a small group
 - Orienting board members to the content of the organization should be tailored to the individual board members knowledge, skill and interests
 - Seasoned board members who need orientation during the retreat may not be effective board members. Typically they are into micro details, administrative and operations and/or are there in name only and should be moved off the board.

Play with tinker toys and other activities such as tossing eggs off building tops

- Great activity for college students in engineering classes. Out of place for retreats. Enough said.

Competitive sports

- If it is worth having your key people do a retreat then be careful about sports. Especially competitive ones. Most retreats are intense. Such intensity can be relieved in low impact ways such as walking, running or swimming versus something where people can get hurt. I have seen it happen.
- Also competitive sports can take a lot of time.
- I believe workout activities should be to relax or reenergize.

Making a few critical commitments versus a laundry list of things that people know won't be accomplished

My guideline is that more than six key areas to work on after a retreat is excessive. Two to four is better.

I have ended a retreat with a single commitment; however, everyone was on board the same item so implementation went smoothly.

Fewer key areas of focus almost always serve best. Estimate in advance how many fronts the organization can focus on simultaneously. It is all on top of an already full plate. When we filter key commitments, ideas or areas of focus, we use these criteria:

- Contribution to purpose
- Time for start-up and long-term implementation
- Costs for start-up and implementation long-term
- Technical difficulty to start up and implement long-term
- Political or managerial difficulty to start up and implement
- Side effects, both positive and negative

We specify these criteria in much more detail. This gives you a sample of the types of things we work in detail when they are part of the design.

Using a filter system like this gives everyone a say and helps everyone focus on the immediate and long-term. I find our clients like and appreciate it.

With an action plan people are truly committed to (no lip service)

- Determine in advance if you want to task at the macro or micro level and what degree of detail.
- Make sure someone is specifically determined to lead an issue, not a committee of two or three people. One person should lead.
- If no one wants to lead an effort after a retreat and you have to talk someone into it, you can forget high level implementation.
- It is much better when someone wants to lead.
- Determine the actions to be taken.
- If micro tasking, then identify three to five steps to get immediately into action.
- Get specific with deadlines and what will be produced by the deadlines.
- January 30th is a better deadline than February 1st or 1st quarter.

With a communications plan that covers what needs to be transmitted to whom

We have a specific template for this. Its elements are:

- Who needs to know something because of the retreat—both functionally and politically?
- Take control of your communications.
- Beat the rumor mill
- This step is crucial, and a key responsibility of the top person. Be careful about delegating it.
- Most of the time the top person delegates only the logistical implementation and does the content part herself.
- Sometimes this is quite complex and normally delicate.

Caution: When key leaders are taken off-site, the rumor mill cranks up to speculate on shutdowns, lay-offs and other drastic results. It is important to communicate before the event or promptly after to quell fears and kill the rumors.

Section 4

Groups, Natural & Unnatural



Section 4: **Groups, Natural and Unnatural**

Natural Groups - The essential ones

When designing a top-level retreat identify the natural group, the right people who should be included. This group includes any, or many, of the following:

- Board of Directors
- Board plus senior staff
- Executive team
- Owners plus key direct reports
- Senior staff
- Project team
- Staff group
- A functional group such as marketing
- Cross functional multi-layer project teams
- Key company players plus vendors, customers or both
- Management and labor leaders

I am frequently asked "What is the ideal sized group?" My answer is one person. Adding more people complicates it.

Seriously though, I think you want to have the smallest number of people who can accomplish the purpose of your retreat. I've led them for two to three people and for 25 or more depending on the purpose.

When I hear someone wants to lead a retreat of 40 or 50 people and do it alone, I shake my head. As professionals we can facilitate groups that size with three to five facilitators and frequently with logistical support people. But smaller is almost always better.

We have techniques for working with exceptionally large groups. Doing those types of sessions can be like orchestrating halftime at the Super Bowl. The largest we've done as a company is 500 people simultaneously.

It is important to look at the group to make sure it isn't too insular. Having everyone from one level, in one function, frequently turns into a "pity party." Having a broader viewpoint or set of perspectives helps keep the group from being excessively inward looking.

Unnatural Groups - Special people to invite to an off-site

As a general principle the deeper and wider in an organization you go, the richer the output of the session. So, depending on the organization, the purpose of the session, size of the organization and the sensitivity of the issues, some of the following considerations could be among your criteria for inviting people:

1. Who brings a unique perspective? Perhaps a key customer or joint venture partner? Who is a non-competing leader in the same field, has faced similar situations and is willing to help?
2. Your banker, lawyer, CPA, architect, marketing firm and other special talents that are outside your group.
3. Past leaders of the organization or function are frequently incredibly rich contributors if they are not overly defensive about changes.
4. Whose nose will be bent out of shape and who will be long-term destructive if they aren't part of the initial effort? I'd rather have them participate than have to fight them downstream during implementation of the plan.
5. Have a corporate leader included in a divisional off-site—as a contributor and participant. This usually pays off with increased insights and stronger relationships.

These are general principles to consider. You know the people, personalities and politics, but hopefully these ideas stimulate an idea or two.

I am 100% against having "observers" in an off-site. Everyone is a participant, no matter what. Besides it is almost impossible for anyone to stay unengaged.

When the top person suggests that *maybe* he or she should not be there ("Because I don't want to stifle discussion") my response is, "You have to be there. Just don't over or under participate."

I show CEOs the best place to sit so they are not in the "power position" and are as out of direct line of sight as possible. You want the ideas bouncing off the storyboard and not filtering through the client or top person.

Enlightened leaders are intimately aware of their role. They typically want to listen a great deal. I negotiate a set of signals to use if I think they are over participating. This is seldom a real issue but more of a concern to be talked through before the session begins.

Section 5

Recruiting Participants and Preparing them for the Retreat



Section 5: Recruiting Participants and Sending Advance Materials

Do this personally. Don't do it by memo. Don't send an e-mail or letter except to confirm the details. Make the invitations special. Tell them how important it is they participate. Tell them how this session will be different and you need them to participate.

A question that always comes up: "What do I send people for background?"

You will want to be extremely careful about preparing people ahead of time for the off-site. My caution is do not send the latest book by the guru of your field and expect people to read it prior to the retreat. A few might. Most won't. Some will scan the book and fake it. They spend their lives in the industry, so any last minute cramming probably isn't going to do a lot to enhance their knowledge.

I suggest rather that you build new, important content into the session background (graphically is best) and sprinkle it throughout the sessions. Sometimes you may want to have the specialist attend rather than have everyone spend hours preparing. Let the specialist brief them when appropriate.

You don't need three hours of speeches and PowerPoint presentations to kick things off. Off-site time is too valuable for "show and tell."

Section 6

Overall Approach for Designing a Retreat



Section 6: Overall Approach to Designing a Retreat

All off-site retreats should be custom designed, based on thorough interviews with the client. The ideal setting is face to face with the client. However, tape recording works well when interviewing over the phone. I have done it many times. Either way, you will want to thoroughly prepare questions ahead of the meeting. Most interviews last about one hour. I ask for 90 minutes to allow for the friendly chat that usually follows.

Here is a sample of questions I pose to clients when preparing for a retreat:

- What is special or distinct about this time that prompts you to do this session now? Normally something crucial is driving the situation and it is important to understand that need.
- Do you intend to use a general planning approach or do you need a custom designed one? A general approach is the SWOT (strengths, weaknesses, opportunities, and threats) along with Mission/Vision etc.

A custom designed session focuses the team on a few key questions. I find people are tired of the traditional template-driven planning sessions and require something customized.

- Instead of the Mission/Vision driven sessions, consider going for unique positioning sessions. You can use questions such as:
 - What will we be untouchable in?
 - What areas won't we be involved with?
 - What will we do that absolutely no one else will do for their clients?

Note: You will find a refreshing type of energy driving the generation of ideas when using high-energy questions. You get practical strategic and tactical ideas instead of "save the planet types of statements" and ideas that are so general and vague that they are hard to drive for true action.

Other answers that are important to know:

- Whose ox is really being gored in this situation?
- How critical is the need for doing something NOW?
- Will international people be involved? What are their language and cultural issues?
- How long have you been in your position? Were you an insider or outsider before you got your job?
- Is the person you competed against for your job still with the company? What is

your relationship with him or her?

- If your company is owned by someone else, what is the relationship like?
- Does your boss leave you alone as long as you are successful or does he or she "get in your hair all the time?"

Depending on your company, we ask a lot of questions in order to determine whether and how we can help you.

Most important: I want to know what kind of *leader you are*.

- Are you collaborative or an autocrat?
- What is your personal vision for the organization?
- What drives you nuts about the organization?
- How long do you expect to be in your position?
- What are your personal goals?
- What is your background?
- What do you do when you aren't being president?

Detailed Design Questions

Topic

1. What is the issue you want to be addressed?
2. What is the problem, opportunity or predicament that you face?
3. If you were to describe your issue to me in one sentence, it would be what?
4. What is the one single thing you must resolve?

Overall Purpose

1. What is the larger picture of this project?
2. How can you quantify this project in time, dollars or numbers?
3. If you can't directly measure where you want to be, how can you verify when progress is being made and the results happen?
4. What do you want to have accomplished when you are done? Specifically? In general terms?

Purpose of this Session

1. When the session is over, what do you want available to you?
2. What are your expectations for this session?
3. How can you quantify your expectations in time, dollars or other verifiables?
4. How can we assure the session is productive for you?
5. What specifically do you need to walk away with?

Non-Purpose of this Session

1. What could derail this session?
2. What should we not talk about?
3. What would be a waste of time to spend any effort on?
4. What is outside the boundaries of this topic?
5. Where are the landmines that can upset this topic?

Permission Level

1. How welcome are participants to challenge the assumptions about this topic?
2. How much freedom does the group have to go down fresh pathways?
3. On a scale of one to 10 with 10 being 100% fresh and bold ideas and one being totally and specifically analytical, what type of thinking do you want?
4. How open would you say you are to having your basic concept challenged?

Background

1. What is your role in this project?
2. What support do you have?
3. How did this project get started?
4. What financial support is available?
5. What has been done to date?
6. What could stop this project?
7. Why are you working on this project?
8. What will happen if you are successful?
9. What will happen if you fail or only partially succeed?
10. What are 10 to 12 key facts I need to know to help you?
11. What visuals do you have that will help us in the session? What charts, graphs, products, photos, ads, anything visual that helps tell the story?

Headers

1. What questions do you want explored?
2. What needs to be part of our session?
3. Who are the stakeholders in this project and what would they want this team to consider?
4. If you could resolve one issue in this project, what would it be?
5. What are the three to five key questions that will crack open your issue?
6. Be sure to use “Ways To” to turn some of their “What” questions into creative ones if needed.

Section 7

Unusual Sessions I Have Facilitated



Section 7: **Unusual Sessions I Have Facilitated** *(That may stimulate your thinking)*

Situation 1

A company—their distribution managers and 15 or so of their top suppliers—set out to figure out how to sell more together. At first the supplier I facilitated was quite aloof. Once we were into the session for about 30 minutes his attitude changed about 200%. He was wondering why the company wasn't doing a certain thing and the company was wondering why he wasn't supporting them. Five million dollars were dedicated right then for a mutual move and both sides were ecstatic.

Fifteen teams were developed consisting of a key supplier, two or three field managers, sales people and marketing staff. At the end of the session, the once aloof customer wanted to buy drinks for everyone. He wanted a group photo and must have shaken everyone's hand about 10 times!

Situation 2

The top eight executives of a company and their spouses asked me to facilitate them on mutual issues. It was something! The spouses (mostly female) asked me to work with them separately and help them address some incredibly tough issues. Later they gave their partners a storyboard presentation of the spouses' concerns and solutions. Most were adopted on the spot.

In light of the Enron situation, one that pops to mind was the spouses said their lives were tied to the company. They wanted in-depth quarterly financial presentations on the state of the business and they got them.

Another I remember was to set up a system where spouses helped others when a move was made when the exec moved off quickly and was all excited in the new job. The spouse frequently had to stay behind to prepare and sell the house, organize the move, deal with the kids and handle a change of career for herself with little assistance.

The energy and passion of the spouses and the subjects they surfaced dumbfounded the execs, and the solutions they virtually demanded amazed them. It was fun to facilitate that portion of their retreat.

Situation 3

One session that will always stand out was with a management team of a company owned by one person. I suggested his wife participate for the entire three days. She hired a sitter for their kids and was a 100% participant. They made two absolutely crucial decisions, one

of which increased their profits by 50% in one year. What was so memorable was at the end, she had three things to say:

1. Without being part of the decision-making process on the major move, which proved to be so successful, she didn't think she could have appreciated it.
2. She had never seen the managers of the company in a real situation that wasn't mostly social, and she came to appreciate how bright, dedicated and determined they were.
3. She frequently lived in fear that if something happened to her husband, she couldn't run the organization. She now had the confidence that the company could continue without him. She told the group, to her husband's amazement, that she would probably sleep peacefully for the first time in years. That was a poignant moment.

Situation 4

Many times I've led groups where someone was on his first day with the organization. Several have included people who have been hired but who haven't started working yet. The retreat accelerates that new person into the organization like crazy, can save months, even years getting acclimated.

Section 8

Frequently Asked Questions



Section 8: Frequently Asked Questions (FAQs)

Question 1 Why is the off-site element so important?

It gets leaders away from the e-mail, in-basket and from getting caught in hallways on breaks, plus before and after meals. Off-site retreats work because THEY ARE OFF-SITE. You get 100% uninterrupted focus. You will get more accomplished in an off-site than any similar number of hours working in your offices.

Question 2 How far away should we get?

As far away as it takes for you to be away. For some organizations that means out of the area code, others out of the state, others many states away.

Almost every time this principle is compromised, the key people later regret doing the session too close to home.

Question 3 What do you think about including golf?

Golf before or after your off-site if you want to spend the time.

Lots of people don't golf.

I think the time planning is too valuable. People should golf on their own time. An off-site should be for retreat. Evenings should be free, but 9 holes may be OK.

People need to relax or do exercise for energizing purposes. Many people do that early morning or after work. Most off-site locations have exercise facilities.

Question 4 Should spouses be involved?

No unless they are contributing members of the work sessions. They change the dynamics a great deal. Conversation over meals is less business and more casual.

If you really want to "celebrate" with the spouses have them come after the work is completed. Be aware though that the participants will be tired. There are exceptions, but this is my general recommendation.

Question 5 How about starting late afternoon and working the next day?

You want people's 100% best effort. Start during the day when people are fresh.

Question 6 How do you feel about doing an off-site over the weekend?

No, unless you are talking about an association or group that can not get people away during the week. This is usually what happens with Medical Societies and Associations.

Question 7 How about doing it at the company's hunting lodge? It's rustic and really lends to a casual atmosphere?

Lodges are normally for hunting and fishing. I'd think twice about doing a session there. Are lodges really equipped with all the right furniture, tools and staff for the type of thinking you want to encourage?

Once again the purpose of the session should determine the location. Location is a key factor in a successful off-site.

Question 8 What do you think of having an off-site at a customers site, plant location, vendors Shangri-La?

In general – no. Once again, there are too many opportunities for distractions.

Question 9 How about combining it with a trip to Las Vegas?

Go to Vegas afterwards if you must.

Question 10 This won't be touchy-feeley will it?

No! It will be hard work. It will be fun at times. It will be intense at times. It will be enjoyable. People will not be embarrassed.

Question 11 Will there be team-building activities?

We do not do things like tree climbing and dropping eggs off the tops of buildings.

We deliver the purposes of the off-site, which normally are to resolve extremely crucial business issues.

We believe teams become much stronger when they successfully address issues, "get on the same page" and get into action and stop "talking about it."

Question 12 How fast will we receive a report?

The next day if you desire. A few days at most.

Question 13 What will it cost us?

Depends on the design, length of time, number of our staff involved, and a host of other factors.

You will get a proposal after we have a couple of conversations.

Question 14 What are some of the more bizarre things that have happened during retreats you led?

- A group was put together in New Orleans and told to open an envelope at 8:00 AM Monday and to present the results the following Tuesday at 2:00 PM in the northern headquarters. They were to develop a plan for 500% increase in sales and after-tax earnings in five years.
- A hostile takeover was announced just as we were starting. Then several officers disclosed they were putting together an inside buy-out. Interesting dynamics.
- The Olympic Torch was carried by runners through the area and parked in the lobby of the conference center overnight. They extinguished the flame and started it up with a Bic Lighter the next morning. So much for the eternal flame legend.
- Toxic fumes carried through the HVAC in a high cost hotel.
- Garth Brooks did a private performance next to our working area in the conference center. The security was so tight our staff was blocked from setting up until the wee hours of the morning.
- After working with the top four or five execs from each of 35 countries during an "exotic" session in Italy the president of the Chinese Company told me he learned something great from me. When I asked what it was he said, "I never thought of asking the people who worked for me what they thought."
- When working with Montreal Children's Hospital about 100 miles north of the city a doctor apologized to me for having to leave the retreat for several hours. He rushed back to the hospital to do the first infant heart transplant in the hospital's history.
- During an off-site with a company that owned several newspapers and radio stations the co-publishers and owners received a frantic phone call from the assistant editor at their flagship property. A state senator had put a gun in his mouth and pulled the trigger on live TV. Should the paper run the photo? The publishers directions to the assistant editor were do what you think is right, we will support you.

Experiences like these are why my work is so fascinating.

Question 15 What is the ideal length of time for an off-site?

Two days for most. Once again the design should drive the timing.

Question 16 What is the difference between a one-day, a two-day, and a three-day retreat?

Depends on the design. In general you can accomplish more and do it in more and tighter

detail with more time. The longest I've done was 5 days.

Question 17 What are the steps when we work together?

1. With your OK I do a tape recorded interview with you
2. After studying the tape I develop a preliminary design and we discuss it to see if we are on the same page.
3. Then we can give you a proposal.
4. After your OK we go to detailed design
5. Initiate all the logistics
6. Implement the preplan
7. You and I will be in frequent contact as you have questions
8. We prepare all materials
9. Our meeting coordinator works closely with your logistics person. Frequently your administrative assistant.
10. We work closely with the off-site location coordinator for your firm
11. The off-site is conducted
12. You receive an Instant Report from us
13. We will follow up with you according to our agreement
14. We follow up months and years afterwards to see how things are progressing

Question 18 How do you follow up after an off-site?

This is part of the design.

Question 19 What kind of referrals do you provide?

Normally we don't because people are referred to us. After extensive interviews with us most presidents know they do or don't want to do business with us. For those who want referrals we are glad to set them up.

Question 20 Have you had failures? Why?

Yes. Of course, although our batting average is quite high. Otherwise we wouldn't have been in business since 1978.

The prime causes of failures are when a leader wants to manipulate a group to a predetermined conclusion. Over the years we've become better at smoking these out.

Some other cause of failures or poor results:

- The President being too distant from the design process
- Not having the right people
- Bad timing for the session
- Loading the agenda with items outside the design

Question 22 How do you evaluate the success of an off-site?

It is the client's evaluation that matters. Did anything significant happen?

We evaluate our role; however, the real test is did the client get what he wanted. I like to talk with the client immediately then 3, 6, 12, and 24 months afterwards to evaluate the true results.

Question 24 What is the most common type of off-site you lead?

Strategic thinking!

Question 25 How did you get started doing this business?

I realized you could accomplish tons more in a day or two than with the usual way of working as long as you...

- Identify the right people to get together
- Clearly identify and articulate the issue for them
- Provide an effective system (Compression Planning®) for them to work together
- Work in a physical environment that is 100% supportive
- Engage professionals to design and lead groups so as to unleash their talents
- Have the support of a staff of logistics professionals

Question 26 What is the toughest session you ever led?

That's easy. Two large medical centers had merged on paper. The merger was about to explode. One of the doctors representing the board of one of the "merged" hospitals admitted on the last night that his agenda from the beginning had been to sabotage the merger.

The session worked. It could easily have failed. I learned a lot.

They came out with a combined plan to open a common facility in five years. THEY DID IT in less than 2 1/2 years.

The chief of staff invited my associate and me to the open house and to stay in his home with his family.

That's why I do this crazy business. It's not for our love of airplanes and hotels. I get my kicks by seeing people pull off the impossible—and they let us help them a bit.

Addendum

Items to Check in a Planning Location



Addendum Items to check in a planning location

- Set up master billing for rooms and conference expenses
- Determine the distance of breakout rooms from main planning room
- Distance from airports to the location
- Exercise facilities and hours
- Determine availability of:
 - Internet access in all rooms – meeting and sleeping rooms
- Suite availability
- Determine number of suites required
- Arrange for a private dining space in restaurants if needed
- Arrange for late checkouts for instructor/facilitators/participants on the last day
- Identify unique restaurants in the area and Identify local attractions
- Ask what unique services are available

Special Touches

- Unique gifts for the participants
- Study the Website of the location
- Determine a procedure for contacting people in conferences

Conference Site

- Conference center pricing
 - Part of the package
 - Extra charges
 - Unusual charges
- Distance from airport
 - Normal time
 - High traffic times
- Conference center check-in procedures
- Storage facilities for participants' luggage
 - Before conference
 - Last day
- Location and number of restrooms
- Business office fax
- Computer availability
- Internet access in conference rooms
- Distance of sleeping rooms from conference center
- Storage space for supply boxes
- Location, distance and phone number of nearest Kinko's
- Location, distance and phone numbers of nearest Office Max/Staples
- Designated smoking policy of facility
- Smoking locations

-
- Types of chairs
 - Number of trash cans required/available
 - Size of trash cans
 - Size of tables: W/L/H and location of table legs
 - Ability to get in after hours - how late?
 - Other groups meeting in facility at the same time
 - Skirting for tables? Yes or No
 - Noise bleeding between room dividers
 - 24-hour-a-day secure facility
 - Projection screen required
 - Flips carts required
 - Whiteboards required
 - Extension cords required: Type Number Length Type of flooring
 - Carpeted excellent
 - Carpeted medium
 - Carpeted poor
 - Other substances
 - Required phone numbers
 - Manager
 - Banquet manager
 - A/V services
 - Account manager
 - Catering
 - Housekeeping
 - Maintenance
 - Shipping / receiving
 - Signage in the conference center
 - Participant friendly
 - Culturally friendly
 - Do we need special signage
 - Conference center transportation to outside restaurants
 - Determine if conference staff will make photo copies
 - Who do you contact after hours if supplies cannot be located
 - Unique services

Food

- Flexibility for lunches
- Rolling break service versus fixed time
- Master billings for meals

Shipping and Receiving

- Name of person responsible for managing shipping and receiving
-

- Hours of operation for receiving packages
- Number of times per day for incoming and outgoing FedEx and UPS express
- Translation resources required
- Any special requirements for people with handicaps
 - Food
 - Electrical
 - Visual
 - Hearing
 - Chairs
 - Placement at the table
 - Motorized scooter
- Private dining room availability
- Steps that can cause difficulties for carrying supplies
- Steps that can cause difficulties for participants
- Availability of back hallways to move between rooms
- Overnight security of planning rooms
- Ability to get into a secure room
- Nearest stores for snacks, miscellaneous items -- e.g. Wal-Mart
- Breakout space / rooms
 - Size
 - Setup
 - Distance from main room
 - Availability
- Unique features in conference planning space
 - Fireplace
 - Large plants
 - Outside balconies
 - Living room furniture
 - Skylights
 - Sunlight that cannot be blocked AM/PM
- Time to schedule pick-up of materials shipped