

Offsite Meetings: How to Go From Good to Great

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When was the last time you were at an “offsite” and your eyes glazed over at an agenda overloaded with speakers, action items, and activities? Were the objectives accomplished? Did you even know what they were? Was there any down time or was it just a PowerPoint marathon? With budgets and time tight these days, leaders can’t afford to host offsite meetings that are not carefully thought through and well designed. Since your time together is limited – not to mention expensive – your offsite needs to make efficient use of the brain power in the room and accomplish the primary objectives: decision-making and problem-solving.

Here are some tips from the Nyman Group that will help your next offsite go from good to great:

- **Figure out the *right* agenda topics.** In advance, send participants an anonymous survey of 8 to 12 questions: 4-6 questions should ask participants to rate the company’s/team’s effectiveness on specific issues. Use a 1-5 scale. Remaining questions should be open-ended to solicit their viewpoints on major issues. The survey results will point you at least three of the offsite’s top agenda topics.

Create *specific* agenda topics (“Should we buy Company A?”). If topics are too broad (“the budget” or “mergers”), people come to the offsite with their own interpretations of the topics and you waste time getting everyone on the same page.

- **Identify the *right* attendees.** Remember why you’re hosting the meeting – it’s to make decisions, not keep everyone updated (which you can do in more-efficient, less-expensive ways). If an individual is not a decision-maker, seriously consider keeping his/her name off the invitation list. Decisions are seldom finalized with groups larger than 8 people. If the goal of the offsite is simply idea sharing and brainstorming, a larger group of 25-30 makes sense.

- **Find a good facilitator.** The facilitator will make sure no one, including you the host, dominates the meeting, and all voices are heard. Consider an outside facilitator to help take the stress off you and other participants and ensure timing and flow. You should also have a recorder to document the proceedings and especially the decisions made. (This is not the same person as the facilitator, and not one of the participants.)
- **Send out agenda and pre-work in advance.** Think of your offsite as you would a board of directors meeting. Prior to a board meeting, directors should receive a package of information so that they come prepared to make decisions, not sit through a day of presentations.

Assign each agenda issue to a participant, who's responsible for presenting a **summary** of the issue at the off-site in under 5 minutes. This summary is **not** an opportunity for the executive to show everything he/she knows about a subject; anything that can be included in a PowerPoint presentation or a memo should be distributed and read prior to the meeting.

- **Dine together the evening prior.** As your participants congregate the night before the offsite, plan an informal meal to allow them to relax, reconnect and socialize. If they're traveling to join you, this is even more important. Casually field questions and set the stage for the next day or two. This scheduled downtime in the evening will ensure a more business-focused and productive team at the start of your meeting the following day.
- **Enlist upper management to kick off your meeting.** A concise 5-15 minute launch from upper management or a critical influencer establishes the sense of urgency, gravitas and support for your agenda. Suggest key points for them to keep their message relevant to your mission and how it supports larger goals within the organization. Upper management can't come? Consider a video address or have a representative read his/her presentation.
- **Establish – and respect – the ground rules.** This should be a no-brainer, but you'd be surprised how many offsites get bogged down or derailed by small professional discourtesies. Cell phones and other electronic devices should be turned off or set to vibrate, and interruptions only allowed in emergency situations. Remember confidentiality, courtesy and respect at all times. The facilitator can keep you honest here.

- **Stick to a timed agenda.** You need to be strict with your time. Don't think in terms of morning and afternoon sessions. Break each agenda topic into segments of 45-90 minutes. Because people grow tired or distracted and become less effective during longer sessions, give ample time for breaks. Don't skimp on a lunch break; it offers a great opportunity for building relationships in less formal settings. To avoid being sidetracked, use the "parking lot" approach for issues that are important, but not pertinent to the agenda issue under discussion.

Strategically breakout, brainstorm and report back. For larger groups, the 80/20 rule works well here. Allow 20% of a segment for the problem overview: this may be the 5-minute summary mentioned above. Assign smaller breakout groups to convene and develop solutions over the remaining 80% of the segment. Allot time for the teams to report back.

Tackle a tough, significant business challenge first, while the team is still fresh. Downsizing, budgeting, operational issues fit well here. Resist the temptation to impose brain-numbing status reports or updates on an energetic atmosphere. Harness the brainpower you've assembled.

Take on a broader topic or challenge in the afternoon. Issues such as cultural change, talent retention, recruitment or shareholder perceptions are best addressed in the lunch when people are more relaxed but (if you've done your job) a bit taxed by the issues of the morning.

- **Factor in informal networking; (ie Fun).** Make sure to balance business time with social and networking time. It is a good idea to have some kind of social interaction – a dinner, a golf, teambuilding exercises, etc. Give your participants the time to enjoy their destination and time together. Making decisions and problem-solving might be the main objectives, but never ignore the power of enjoyment and the valuable business insights that come with it.

The successful offsite or retreat is a carefully orchestrated blend of structure and discipline combined with an environment to stimulate creativity, dialog and synergies for maximum results.

The Nyman Group has organized, lead and facilitated retreats for leading clients worldwide. Read more about Nyman Group's approach to leadership at www.nymangroup.com.