

12 STRATEGIES TO BOOST THE ROI OF YOUR OFF-SITE RETREAT

For over 30 years
Dr. Philip Merry has
facilitated team and
departmental retreats
with global
organisations in
52 countries.



Research from Dr. Philip Merry
Team Retreat Facilitator on 5 continents for over 30
years

Philip Merry has been facilitating Team Retreats in 52 countries for over 30 years.

Based on this experience he has distilled what he considers to be the essential factors that will help to guarantee the success of your off-site retreat. Philip is happy to share his ideas with all who wish to improve the quality and ROI of their off-site retreats.

Enjoy.

“Some say that a “retreat” is defeatist language, and that we should rename it an advance”.

A RETREAT IS:

“time away from the active organisational setting in a more relaxed environment for the group to consider how it works together to achieve its aims, in order to return inspired, transformed and renewed”



WHAT IS A RETREAT?

There has been much discussion about whether “retreat” is the right word for the gathering of a team or department or group of people to consider how they work together and achieve results. Some have even commented that retreat may sound defeatist and that “advance” is a more appropriate term!

I stick with the word retreat because it is already in common parlance in organisations. In fact, when you look at the military term “retreat”, it does not necessarily mean defeat, it could mean that an army retreats to regroup before it attacks again. In this sense retreat is an appropriate term.

During a retreat a team or department is taking time out to consider its relationships, or to consider its strategy in order to regroup and go back into the world with a sense of renewed purpose. My definition of retreat is “time away from the active organisational setting in a more relaxed environment for the group to consider how it works to achieve its aims, in order to return inspired, transformed and renewed.”

“There are times
when it is right to
hold a retreat and
times when it is not”



TO RETREAT OR NOT TO RETREAT ?

There are times when conducting a retreat is the right thing to do and there are times when it is not.

A Retreat is Not Appropriate when:

- a. There is no clear purpose for a retreat
- b. The retreat is just an extension of a normal meeting
- c. Not all the concerned parties can be present
- d. It would take too many people away from the work environment at an important time
- e. There are about to be significant changes in personnel
- f. There is major conflict in the team which can only be sorted out by individual managerial action

A Retreat is Appropriate when:

- a. A new product or strategy needs to be discussed
- b. There are poor interpersonal relationships
- c. A new leader needs to get to know the team
- d. A new team is formed
- e. Dialogue is needed to resolve business issues
- f. Different units need to align with each other
- g. There is a need to break silo mentality

12 SECRETS OF RETREAT SUCCESS

The following factors will help your retreat succeed:

1. Deliberate planning process
2. Clear sense of purpose
3. Agenda tailored to maximise dialogue and creativity
4. Meaningful group activities that develop both personal skills and team abilities
5. Location and venue that creates openness and dialogue
6. Experienced neutral facilitator to help team look at itself
7. Right duration: not too long not too short
8. Time to discuss emerging issues that arise at the retreat
9. Full participation of the different national cultures
10. Strong finish that creates togetherness and action
11. Meaningful outcomes of transformed mindset and practical implementable results.
12. Time and activities for networking



LET'S LOOK A LITTLE DEEPER AT EACH OF THESE

“SECRETS OF RETREAT SUCCESS”

“Select early on a team who will take responsibility for planning.”



LET'S LOOK A LITTLE DEEPER AT EACH OF THESE “SECRETS OF RETREAT SUCCESS

1. DELIBERATE PLANNING PROCESS

Three planning factors that are crucial to ensure success:

- a. Select a planning team that is representative of the various groups that will attend the retreat. It is my experience for example, that members of the staff relations committee should be represented in the planning process. If there are contentious issues to be discussed, then all the various parties involved should be on the planning team
- b. The support of senior management. It is important to let senior managers know the purpose of your meeting, and to share with them the agenda and outcomes. You may also ask if there are issues that they wish you to put on the agenda. Doing this ensures their interest and buy-in.
- c. It is important to ensure that all the relevant people attend the meeting. There is nothing worse when discussing an important matter to find that the people who can contribute to that issue are not present.

“Nothing kills a retreat more than participants feeling it was pointless – establish and share a meaningful agenda.”



2. PURPOSE

It is important to clearly identify the reason for having the retreat. There's nothing worse than people attending a retreat and feeling that it was pointless because they were not clear about the purpose, in fact that does more harm than good.

To become clear about your retreat purpose:

- a. Identify in preferably 2-3 short sentences, why the retreat is happening. There are generally business and human goals for holding a retreat. Make sure that senior management and all concerned parties agree to the goals.
- b. A business goal is any goal that impacts the overall purpose of the organisation at the task level such as discussing a product or a new market or a new policy.
- c. A human level goal gives time and opportunity to discuss in a relatively informal context, interpersonal issues that lurk beneath the surface in the normal business context that are sabotaging business success. In the busyness of the everyday work space conflicts arise and are not fully talked through or addressed. A team retreat allows the surfacing of these differences in a relaxed atmosphere. The human factor cannot be over-emphasised. In almost every retreat I have ever facilitated, the number-one takeaway for people has been the conversations over breakfast or at the bar that develop relationships and forge bonds, and a climate where important issues can be discussed.

“People have to co-ordinate with their life back home – so let them know ahead of time what they will be doing during the retreat.”

“Don’t fill every moment of the day – allow time for networking.”



3. PRE-PUBLISHED AGENDA

- a. People feel comfortable with a pre-published retreat agenda because it gives them a sense of order and security. People need to understand how they will spend their time. E.g. Will there be time for evening relaxation? Is there time for exercise in the morning? What time the breaks will be? Remember that people will need to co-ordinate their private lives back home, so give them clarity on what they will be doing and when will they be free.
- b. Retreats often fail because they are packed with too much information that cannot be finished during the retreat. So, focus only on the key issues and allocate enough time to discuss and resolve those issues.
- c. Set the questions that need answers during the first half of the retreat, and then spend the rest of the retreat finding answers to those questions. There is nothing worse than raising lots of issues and having no time to fully discuss them.
- d. Even though the retreat’s purpose has been set prior to the retreat it is always good to allow time at the beginning of the retreat itself for people to express their hopes about the outcomes of the retreat, and even add additional items to the agenda.
- e. Take time at the start to identify expected behaviours – plus and minus – that people will adhere to.

“Most retreats contain fun team exercises which allow people to interact in a creative way.”



4. ACTIVITIES

- a. Provide bonding “get to know you” exercises at the start of the retreat. People like to connect, and I have a rule that all voices should be heard within the first 10 minutes of a retreat – this drives engagement.
- b. Most retreats contain fun team exercises which enable people to interact with each other in a creative way. This can however backfire if participants feel that the exercises are too childish or require strenuous physical activity. So match your activities to the fitness level of ALL participants.
- c. If you are planning an activity, do make sure to link group exercises to the issues within the team and ensure that there is enough time to debrief properly what the exercise means to the team.
- d. Some retreats also benefit from completing a personality style profile prior to the event. DISC or MBTI and Belbin Team Profiling are all good to use. I have a preference for profiles that are 360 in nature so that participants can understand how others perceive them.

“Morale is lessened if adequate attention is not paid to the quality of the location.”

“Retreats close to nature have a motivating effect.”



5. LOCATION AND VENUE

Location means the geographical area and venue is the actual building (hotel) where the retreat will be held.

- a. I have found that it helps to have a retreat at a location which is close to nature. In our urban environment we often lose touch with the natural world and a location close to nature has a motivating effect. There is something about being in nature that promotes deeper understanding and deeper thinking.
- b. Quality of venue is important. There is no point flying people from all over the world to then run the workshop at a below standard hotel. It will help achieve retreat success if you have a reasonably comfortable experience at the hotel.
- c. Make sure that the room you are using for main sessions has windows. There is truth in the saying that people can think strategically as far as the eye can see. If you are in a high-quality room but have no windows then creativity and openness can be blocked.
- d. Do not economise on food: meals are a vital way of bonding and being close to your colleagues, and much of the real learning takes place over the breakfast table.
- e. Make sure that all the practical issues are taken care: Wi-Fi, sound system, sufficient flip charts (and that they can be hung on walls) and board markers that work.

“The facilitator needs to be someone who can work with group dynamics.”

“A facilitator needs to establish rapport with all groups represented at the retreat.”



6. FACILITATOR

A good facilitator is crucial for retreat success. They ensure the agenda items are covered and that the human dynamics stay positive. Qualities a facilitator should have:

- a. A results/achievement focus. You are at the retreat to get the work of the retreat done and it is the facilitators job to keep you to task and ensure that the retreat ends with the major goals achieved.
- b. The ability to establish rapport with the group and be perceived as trustworthy by the group
- c. Someone who understands and can work with group dynamics. Often the very reason for the retreat is to examine group dynamics so that they can improve. A facilitator who is skilled in group dynamics is able to hold a mirror up to the group so that it can look at its own behaviour.
- d. A sense of humour can help a great deal
- e. Whilst keeping the group to the timetable, a facilitator also needs the ability to be flexible.
- f. The skill to understand what is appropriate to be discussed within the group session, and what needs a private discussion
- g. An understanding of cultural differences and how they impact communication and engagement style, so they can adapt their style and engage different cultures.

“After over 30 years of conducting retreats in 54 countries my conclusion is that 3 days and 2 nights is an ideal length of time for a retreat”. Philip Merry

At a retreat ALL people need to feel heard.



7. DURATION

Retreats that are too short or too long are not a good idea. I have found a combination of three days and two nights to be an ideal time for a retreat. Two nights of “living together” enables a group to work through any interpersonal issues that need attention.

- a. On the first day people get comfortable with each other
- b. On the second day the difficult issues are ready to be talked about.
- c. On the third day you should be moving towards a resolution so that people can feel that before they leave the problems have been resolved.

Manage the agenda carefully to ensure that outstanding issues do not come up at the last session.

8. SPACE FOR EMERGING ISSUES

Issues emerge during a workshop and it is therefore important to find time during each day to look at these emerging issues. I always have a flipchart at the back of the room for people to record any issues that they wish to discuss, and I will review them with the group each day. The benefit of this is that people feel that their voices are heard, which helps with engagement and trust.

“Some cultures are more outspoken than others, all need to be given the chance to speak up.”



9. NATIONAL CULTURE

- a. It is most often the case that retreats involve people from more than one culture, and therefore the facilitator needs to take into account the communication patterns of ALL cultures in the room. For example, some cultures are more outspoken than others especially when it comes to discussing difficult issues of conflict. Therefore, if the facilitator constantly says, “questions anybody?” to the whole room, then the more direct cultures will speak up and the quieter cultures will not. The facilitator therefore needs to set a climate where all cultures can contribute and make full use of small group discussions to raise difficult issues.
- b. Sensitivity to the dietary requirements of different cultures, as well as understanding different habits around alcohol is also important.

10. FINISH STRONGLY

The last event before everybody leaves is crucially important. It needs to be an activity that, no matter what difficulties there have been in the retreat, pulls people together as one team. It can be a physical exercise indoor or outdoor, or it can be a presentation by different groups. Whichever exercise you choose ensure that it is one which helps people leave on high.

“At the end of the retreat
make sure you re-visit the
goals.”

“If action is to be taken
make sure there are names
and dates established.”



11. MEANINGFUL OUTCOMES

- a. People came to the retreat to ensure that there was progress on the goals established for the retreat. Nothing is worse than leaving the retreat with the majority of people saying, “well that was a waste of time.”
- a. At the end of the retreat make sure that you revisit the goals and comment on the level of achievement of the goals.
- b. It is often the case that not everything will have been achieved, and people understand that. But it is important to highlight the progress that has been made.
- c. For any action agreed make sure to allocate people and time deadlines to those actions.

“The unwritten goal of most retreats is that people get to know and understand each other better, so that they can collaborate more effectively”.



12. SOCIAL ACTIVITIES

Most retreats have an unwritten goal, which is to ensure that people bond, network, and get to know other team members. All 12 factors outlined here, from the location perspective, the food perspective, the activities perspective, serve the bigger purpose of bringing people together in a way that allows them to get closer to and understand each other.

In short retreats need to progress the human dimension of the team. Factors which especially help this are:

1. Introductory exercises promoting relationship building.
2. Retreat activities that promote teamwork.
3. A facilitator skilled in group dynamics.
4. Relaxed evening socialising.
5. Free time with no agenda.

The worst retreats are those where participants “retreat” to their bedroom in the evening as soon as dinner is done. Maximising the benefit of human factor in retreats, is about ensuring that people want to get to know each other at a deeper level.

Dr. Philip Merry

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CONCLUSION

Many organisations set the date of their retreat and hope that it will be okay on the day. This does not mean that the “hope” approach will always fail. But if you want to be assured of success please feel free to use my 12 strategies, distilled from many years of experience facilitating retreats in many countries. They will help you “ensure” the success of your retreat as opposed to just “hoping” for it.

Enjoy.

Philip Merry

For over 30 years Dr. Philip Merry has facilitated retreats with global organisations in Australia, Bahrain, Bhutan, Brazil, Cambodia, Czech Republic, China, Colombia, Dubai, Egypt, Ethiopia, France, Fiji, Hong Kong, India, Indonesia, Ireland, Iraq, Italy, Japan, Jordan, Kenya, Korea, Kurdistan, Lao PDR, Lebanon, Malaysia, Maldives, Mali, Mexico, Myanmar, New Zealand, Nigeria, Norway, Pakistan, Panama, Papua New Guinea, Peru, Philippines, Poland, Russia, Singapore, South Africa, Spain, Sri Lanka, Switzerland, Syria, Thailand, Taiwan, USA, UK and Vietnam.

If you need further advice or would like to discuss how I can help facilitate your off-site retreat, please contact me:

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