

What Happens Behind Closed Doors at Management Retreats?

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Summary: The concept of *management retreats* is largely unknown to Chinese business people. Many Western business leaders also do not know when or how to take advantage of this very effective management tool. This article addresses the benefits of retreats, and important issues to address:

Definition of *Retreat*: By a retreat, I mean the process of taking a business team off-site for a few days to accomplish a developmental objective for the company. Like a good military retreat, a good management retreat usually results in a clearer, more coordinated plan and more energy for the work.

Reasons to have a *Retreat*: A well-planned and executed retreat provides a team with both the distance it needs to get a broader perspective on its challenges, and the time and processes it needs to come up with creative ways to overcome them.

Examples of *Retreat Successes*: I have seen great things happen as a result of retreats. One group surprised its president by devising a plan to completely change their company's direction. Another group was able to resolve differences of opinion that were boiling beneath the surface for a long time and greatly impeding progress. At another retreat, the members of a top management team who had been competing against each other ended up becoming deeply cohesive and powerful. Retreats can be transformational for the organization and the people.

Objectives *Retreats Can Accomplish*: Retreats are an excellent way to speed up your accomplishment of the following objectives: strengthening a team; increasing cross-functional cooperation; getting a new person on board and up to speed quickly; ensuring that a strategy or scheme is understood and bought-into by everyone; training a lot of people in a skill or technology; increasing organizational and team spirit; increasing enthusiasm and energy; developing a strategy; communicating financial and operational results; introducing a new product and, probably the most overlooked reason, celebrating accomplishments.

Bad *Retreats*: A bad retreat is worse than no retreat. A bad retreat would be one where no progress was made towards the objectives, or, worse, where there was regression due to poorly-handled conflicts, or where the participants left with damaging, psychological *Unfinished Business*. (See Broer audiotape, *The Power of Unfinished Business* for more.)

Role of Consultant/Facilitator Before the *Retreat*: Engaging a seasoned organization development consultant ensures that the organization will get maximum return on the money and time it invests in its retreat. One of the consultant's first priorities is to clarify his or her own role in the process. Following that, he or she *helps the organization to*:

- (1) invite the right combination of people so the group is positioned to create good solutions and quickly implement them,
- (2) clarify each participant's role,
- (3) get a clear and accurate picture of the organization's current state,
- (4) develop good objectives for the retreat, and
- (5) identify and help the organization to complete pre-retreat assignments, for example, researching what the competition is doing and planning, and getting feedback from customers. Then the consultant designs the retreat to accomplish the objectives.

Role of Consultant vs. Leader During *Retreat*: During the retreat, the consultant facilitates and the leader leads. The leader keeps his or her role in the organization and looks to the facilitator for assistance with the process. The

leader cannot be the facilitator, as well as a participant. The consultant guides the group through processes that enable the members to be honest and voice their real opinions.

Skills and Presence of the Facilitator: The consultant should be familiar with the latest meeting technologies; for example, *Open Space*, *Future Search*, and *Action Research Learning*. He or she should also be able to build trust and credibility with the participants. She or he should be able to thrive in ambiguity and design creative interventions as the meeting progresses. Here's an example of one "intervention" that I made as a facilitator with a group in Beijing recently. The exasperated leader actually yelled at his team of quiet people, "Speak up with your ideas or I will close this meeting and make my own decisions!" I felt that the reason his people were not responding was their fear of appearing ignorant to the leader and in front of everyone. Without explaining why, I intervened and suggested that the team break into small groups and report back to the leader and the total group in fifteen minutes with a list of their ideas. That way, they were able to develop and present their ideas as part of a group, which greatly reduced their fear of losing face with the leader and each other. The meeting was able to progress forward. We can only imagine what might have happened if a facilitator had not been there to intervene.

Action Plan and Follow-Up Critical: Before the retreat ends, it is critical that the group agrees to an Action Plan with clear accountabilities and deadlines – and assigns a Project Leader and process for follow up. Otherwise, many good ideas will be lost and the energy will quickly dissipate. Someone should be assigned the task of disseminating important information that was captured at the Retreat. This can take the form of minutes or a summary, along with copies of the boarded material and the Action Plan. Often retreats are the start of many projects, and it is helpful to provide everyone with a binder with appropriate tabs (including blank tabs for future use), which people can use to keep track of the action plans, projects and progress reports together for easy reference and continuity.

Eileen Broer has helped executives from government organizations, associations and businesses in all kinds of industries design and facilitate successful retreats and workshops for over twenty years.