Don't Settle for Another Failed Offsite Strategy Meeting

A Metre22 Article

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Imagine you're attending an offsite strategy meeting. You're prepared. You're fired up. You're eager to engage. But ten minutes into the meeting, you're checking your email – and so are most of the people around you.

Sound familiar? Of course it does. Many – probably most – strategic offsites are held with great intentions, but they turn out to be a huge waste of time, money and company resources.

Why? See how many of the following value-destroyers you recognize:

The discussions are too "high-level," so the group knows nothing will really change. There are no action plans, no follow-ups, no blueprints to guide tactical decisions, no ownership to ensure decisions are made implemented. Instead, everyone just went back to work, and back to business as usual.

The group assumes data equals insight. Sure, your market research group created a 72-page document filled with comprehensive information, but that data typically looks backwards – internal sales figures, price trends or other economic factor trends. A great strategy meeting looks at factors that impact your business, then it quickly shifts focus to assumptions about the future and how that impacts your strategy.

Say you run an energy services company that provides services to oil producers. The past is interesting but the future is everything. Reviewing the 10-year chart of WTI futures price history – something likely already widely understood – would have limited value. Structuring a discussion around emerging technologies that might change the way equipment assets are tracked and managed could yield higher returns on the group's time.

You focus on all the things you could do instead of all the things you won't do. But some of the most important strategic decisions involve what you will not do.

Take Southwest Airlines. Southwest's strategy is to be the lowest-cost provider. Say they hold an offsite meeting and an executive recommends creating airport lounges. Other airlines might commission a study, perform market research, determine if airport lounges are valued, and run cost-benefit projections. Southwest would simply say, "Does that help us be the lowest-cost provider? No." **Saying no can create clarity and a real sense of purpose.**

You turn high-level discussions into group exercises. Mission statements and vision statements are great. But they can't be written as a group.

What you can do, though, is use a straw model. You can share a draft of a mission statement and ask for input on what people like and what they would change. Then you can revise your straw model offline instead of wasting the rest of the meeting arguing over every word. As a group you could never order one pizza that satisfies everyone on the team, and as a group you will never create a strategic document that satisfies everyone on the team. So don't try.

You didn't take advantage of breakout sessions. Breakout discussions allow for faster input, better focus and better feedback. Participative breakout sessions, used correctly, can be much more valuable than discussing every issue or prospective decision in one large group.

The list could go on and on. So let's flip it around and look at the key characteristics of a successful strategic offsite. We'll start with basic ground rules, then look at key characteristics of a successful meeting, and finish with a list of questions to ask yourself as you plan your next offsite.

Ground Rules to Create a Foundation for Success

Establishing ground rules for a meeting might seem like a waste of time, but it's not. Execution and accountability begin with understanding expectations, so why not ensure every attendee knows those expectations?

Communicating expectations in a set of "ground rules" going into the meeting, and providing some time for the group to adjust or add to them at the beginning of the session, can be helpful.

To illustrate, see the example Ground Rules:

Example Strategy Offsite Ground Rules

1. **Wear your company hat.** This session will focus on the effectiveness of the entire organization, not just your area. Always think broadly, not territorially.
2. **Only share comments that are relevant to the whole group**. Our focus is on the forest, not on the trees.
3. **Never use a silent veto.** If you disagree with a conclusion, speak up.
4. **Be 100% transparent.** No hidden agendas, no managing upwards, no political maneuvering – say what you mean.
5. **Base your comments on facts.** Use data, numbers, and results to support your points of view, comments and suggestions.
6. **If you agree inside the room, agree outside the room.** You will play a key role in making decisions, so once those decisions are made, embrace them.
7. **Don't share until later.** Ours is a sharing culture, so it's tempting to text or email members of your team to let them know what is being discussed. What we feel strongly about in the first hour may be very different from where we end up as a team.

Now let's look at some basic steps to take to ensure your meeting is successful.

Key Characteristics of a Successful Strategic Offsite

How can you make sure your offsite is successful?

- **Hold the meeting at the right location.** Don't just use an empty conference room in your building. Pick a location where you can really focus on the topics at hand. Strategy often involves expanding horizons and moving beyond comfort zones, so make sure your location creates a sense of purpose, focus and change.
- **Make the right research available before the meeting.** Organizational KPIs, market conditions, competitive analysis – you must have the right data to underpin your decisions.
- **Ensure the right people attend.** If key leaders are unavailable, reschedule the meeting. Holding the meeting on the scheduled date is much less important than holding a successful meeting. Never try to muddle through.
- **Use an outside facilitator whenever possible.** It's nearly impossible to ask yourselves the hard questions. A skilled facilitator fosters a sense of teamwork that transcends hierarchy.
- **Leave room for processing.** Don't rush to an answer. Let important discussions marinate. Allow the best answers to present themselves. Trust that they will.
- **Always explore multiple dimensions of a problem.** Too often, focusing on a single dimension – such as quality, market share, or employee engagement – will narrow the list of potential

solutions. Don't try to problem solve until you've looked at a problem from a variety of angles.

- **Don't rush to find a solution.** Often, one of the first ideas presented will sound great to a few of the people in the room, and they will want to stop brainstorming and move directly to implementing that idea. Don't be tempted; keep the ideas coming until the time is right.
- **Drive toward ownership and personal investment.** Every meeting is just a means to a number of outcomes. Beware of grudging head-nods. Beware of people who appear to agree only on the surface. Push for accountability. Push for commitment.
- **Assign and establish resources to support your actions.** If you aren't willing to provide resources to support action items, you haven't created a strategy.; you've created a wish list.
- **Establish a clear process to ensure follow-up is owned.** Spend a significant amount of time detailing specific actions and, more importantly, specific ownership and accountability for producing results.
- **Create a communication plan.** Spend the last part of the meeting deciding how participants will share information after the meeting. The goal is to ensure consistency of the message and prevent rumors and misinformation. Decide who needs to know what, and when.

Even if your meeting outcomes aren't fully baked, you should share some things because it's a great opportunity to build engagement by planting seeds for future communication and future discussions. As long as everyone in the meeting knows what to say, and to whom.

A Successful Offsite: A Checklist for Success

Sound like a lot? It can be... but not if you take time to plan and prepare. Here is a list of questions to ask yourself that will help ensure you cover all your preparation bases.

1. **Communication Commitments:** Who owns what will be communicated before, during, and after the meeting? Don't just think about what you will communicate – decide who is responsible for those communications.
2. **Meeting Objectives:** What are the primary goals of the meeting? Do we seek to share information, gather input, exchange ideas, make decisions, create implementation plans? Rank the objectives in priority order.
3. **Meeting Outcomes:** What does accomplishing our meeting goals look like in practical terms? If your goal is to create an implementation plan, decide ahead of time how comprehensive you want that plan to be.
4. **Anticipated Dynamics:** What turf issues do we foresee? What competing agendas may we need to deal with? What personalities may clash? Understanding the needs of the participants will help you prepare to better deal with potential conflicts or interpersonal issues.
5. **Success Factors:** What are the keys to making sure the meeting is a success? Ensure the right people will attend, the right information is on hand, the setting will foster open communication, etc.
6. **Potential Risks:** What might go wrong during the meeting, and how can you deal with those problems? Spend plenty of time thinking, "What if...?" and developing solutions. Then if the worst does happen, you will be prepared.
7. **Follow-up Plans:** What needs to happen afterwards to ensure the meeting truly makes a difference? Consider how you will assign ownership and accountability, what communication plans you need, when you will hold follow-up meetings, how implementation should look and feel.

A strategic offsite is only successful if it truly makes a difference to your organization. Spend as much time thinking about what will happen after the meeting as you do planning for the meeting, because the true test of success is not what you talk about, it's what you do.