



## Tips For Effective Team Offsite Meetings

by David Patrick, Managing Partner at [Tree Trunk Partners](#)

Whether you are a CEO wanting to conduct a strategic offsite with a 5 year horizon, or a team leader wanting to get your folks aligned around a set of goals for next year, it is important to have time with your team outside of the daily business to plan for the future.

In this article, the term „offsite“ doesn't necessarily mean physically offsite, but that you are, as a team, taking time away from the immediate demands of today's business to plan for the future and consider not only „WHAT“ gets done, but also „HOW“.



Although a strategy offsite for the leadership team of a large business is very different from a department-level offsite, they have some very important things in common, including:

- Learning from the past and planning for the future
- Considering the longer term
- Agreeing on the HOW in addition to the WHAT

As a minimum it's important to do 3 things early on:

- Set a date that everybody can make
- Determine the location, and reserve it
- Decide on the need for an external facilitator (or not), and book them

In the following paragraphs we offer some considerations to help you prepare for, and run, a successful offsite meeting.

## The Value of An Offsite

Whether a strategic retreat with the Board or an objective-setting session with a production team, such meetings are all forms of planning for the future. Taking time out for planning allows organizations to learn from the past, adapt to change and, consequently, improve performance. Planning is a key part of Demings's PDCA (Plan-Do-Check-Adjust) cycle, and of Lewin's concept of Action Research– both of which are about improving performance.

A successful offsite provides an opportunity for a team to strengthen relationships and trust, which in turn clears the way for mutual challenge, change and improvement. A well-designed offsite can be a starting point for improved collaboration and communication within, and beyond, the team.

Finally, a well-planned and -executed offsite is an important moment for you as a leader. It is a time when your team will be watching and listening closely. It is an opportunity for you to model the behaviours you expect your team to use in leading and collaborating with others such as listening, fostering candid dialogue, being inclusive and sharing vision.

## What To Include In The Agenda

Although an offsite's focus is planning for the future, it often makes sense to start by considering the past. However, this should only be a small part of the agenda and it should not be about sharing business results. Preparing and sharing results should happen before the offsite with participants coming prepared to talk about what can be learned from past performance, what should be continued or strengthened, what needs to change, and what the results imply about future opportunities.

If you plan to use surveys or interviews of participants in advance of the offsite, this anonymous data can provide additional, valuable input and also help ensure that controversial or unpopular opinions get heard in a way that people feel safe.



You might also consider inviting an internal or external customer, or your boss, to a part of the agenda, so they can provide their perspectives on your work, competition, and the changing environment.

Often, a key part of an offsite is getting the team aligned around what to prioritize or de-prioritize. Depending on the type of offsite, there are many different frameworks that can be used, ranging from simple

voting techniques to SWOT analyses, Porter's 5-Forces, or the BCG growth-share matrix, to name just a few.

In addition to agreeing on the objectives for the team or business (the „WHAT“), a successful offsite also results in decisions about the „HOW“ and there are two dimensions to this. The hard dimension of HOW means clarifying who is responsible for delivering what, by when, and which resources will be provided. The soft dimension of HOW is about agreeing how the team will work together. For example: what type of meetings are needed and in which format; how will team members hold each other accountable; how will disagreements be surfaced and resolved; which behaviours do the team want to model to the rest of the organization?

To stimulate input for working on the soft HOW, you may wish to build in some „process reflection“ sections to step out of the content and explore with the team how they have been working together during the offsite and what can be improved.

Finally, when planning the agenda, you need to allow sufficient time towards the end of the off-site for: (1) distilling agreements down in to very tangible next steps; (2) agreeing on follow-up mechanisms to complete any unfinished business and to review progress, and (3) agreeing on any communication to the wider organization.

## How To Plan For, And Run, The Offsite

As the leader, you own the planning and delivery of the offsite. This doesn't mean that others shouldn't be involved in helping to design, organize, or run it. Indeed, having others contribute can help ensure commitment to the process and buy-in to the outcomes.

It's important to give people enough notice for any pre-work you want them to complete before the meeting. If you are asking your team to collect data, we suggest to provide templates. This helps ensure that data are distilled into insights, and that each participant has roughly the same „stage-time“ when presenting. To keep energy high, consider having pre-work presented by gathering around posters on the wall rather than using PowerPoint.



Different people have different levels of need for preparation: some might be happy with minimal preparation and want to „see where things go“ whilst others might feel more comfortable if they have time for reflection and making notes up front. So, even if it is only high level, an agenda needs to be sent out early on. This also allows people to make arrangements for

any important, short calls during planned break times.

Trying to squeeze too much into a day can be counter-productive, reducing people's ability to be fully, mentally present and focused. It's much better to add on an additional half day or day, providing participants the „margin time“ they need to feel on top of business and personal matters.

Using an external facilitator allows you and your team to be fully focussed on the content of the offsite and not be distracted with the process or logistics. It can also help provide a sense of safety and neutrality, ensuring that important but uncomfortable topics are surfaced in a constructive way.

As a leader, it is critical for you to own the meeting, even if you are not running it. That means providing direction and vision to help guide the discussions and decisions taking place and encouraging open and inclusive exchange. Even if you are using a facilitator, it is important for you to open the offsite by sharing your expectations (about the offsite) and to close it by sharing your expectations (about next steps and participants' commitment to what has been agreed).

Having people leave the offsite feeling upbeat and positive with agreement on future priorities and objectives is a useful outcome but does not in itself mean it has been successful. Although it is recommended to collect feedback on these things after the offsite (to learn for the future), the real „proof of the pudding“ comes later: have key decisions been communicated in the organization; are both the hard and soft HOWs being lived into; are the agreed actions on track; are the agreed follow-up sessions happening?

The success of your team offsite depends on it being well planned, well executed and well followed-up!

## When And Where To Hold Your Offsite

We have found November to be a good time for offsite meetings, avoiding what is often a busy December in many businesses. Waiting until January might help ensure that there is clarity around targets that get handed-down to you, but you will lose the benefit of having your team hit the ground running in January. Even if targets and priorities from above have not been finalized, it is often possible to gain sufficient understanding of where they are heading. January can be used for fine-tuning.

Holding your „offsite“ on your organization's premises can simplify logistics and help keep costs down. We recommend finding a location that removes people from their usual landscape, whether that be at the other end of the building or, ideally, off-premises. Getting away from the place where daily business happens helps people disconnect and come with clearer minds to consider the future.

Finally, whilst a team-building activity such as a nice dinner or cooking a meal together can be a great idea, it needs to be chosen very carefully. Firstly, it needs to be completely inclusive: only plan to hike up the local hill if you are sure that everybody is comfortable with that; avoid anything with overtones of competition or aggression such as go-karting or paintball shoot-outs; and be sure to finish in time for people to get a good night's sleep!



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Tree Trunk Partners help leaders design, run and follow-through on offsite meetings. We are based in Zug, Switzerland and are a consultancy specializing in Team Development, Executive Coaching and Leadership Development.

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#### **Recommended Reading:**

Frisch, B. and Chandler, L.; Off-Sites That Work; Harvard Business Review; June 2006

Beedon, J., Bender, K.J. and Brooks, A.M.; Meetings By Design; Vista Consulting Team Ltd; Feb 2002; ISBN 0954147006

Dattner, B.; How To Plan A Team Offsite That Actually Works; Harvard Business Review; June 2015