

Retreating Forward—10 Steps for a Successful Offsite



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The leader of your team says, “We need to bring this team together, get our key suppliers on board, and have some fun; let’s organize a retreat away from the office, maybe next month.”

Many workgroup retreats, or off-sites, devote most of their planning to logistical issues like speakers, venue, and food. Such events may be informative, but they can’t be termed successful if participants never try to develop any of the ideas that excited them at the retreat. Sometimes, even calling it a “retreat” becomes self-fulfilling.

The following is an abbreviated template for planning successful workgroup “advances.”

10 STEPS FOR A SUCCESSFUL OFFSITE

1. Why are we having this event?

- Be clear about your objective. Is it strategic (e.g., to encourage new work practices, innovative thinking, or consensus), or do you just want a fun time out?
- Traditionally most time is spent on logistics, but a great secretary can make all that happen, allowing you to focus on the primary objectives and participants.
- Design everything around your core issues, and match your resources accordingly.

2. Give the event a theme

- A theme consistent with the key objective adds energy and focus. For



Hard Grind—Teamwork aboard one of two matchracing America’s Cup yachts crewed by the legal department.

example: raising the bar; aligning with the business; from lawyer to business partner.

- Stay focused, and don’t try to cover everything.

3. Be participant driven

- Participants dictate any event’s success. Good speakers contribute to a great event, but individuals make it a certainty when they learn, and act on their ideas.
- Every session should focus on meeting participants’ core identified needs, consistent with the objectives and theme.
- Do the participants see the event as value for money, or for their time? Ask this question even for internal events.

4. Conduct pre- and post-event surveys

- Nothing is more important than actively engaging with participants. Carefully assess their needs, and find the best way to deliver on core objectives.

- A short questionnaire can promote engagement, with questions such as “What are your two biggest challenges?” and “What issues would you like covered?”
- Afterwards, seek more than just feedback on venue, speakers, and food. Find out what participants really learned, and how they’d improve the next event.

5. The right mix of presentation and participation

- Participants tire of being talked at. Don’t make a day into a series of speaker slots; maximize opportunities for participants to develop and act on new ideas.
- Consider speakers outside your industry who face similar issues. You’re in telecommunications? Get someone from an electricity company. You’re all about innovation? Invite an innovation expert.
- Leap outside the box. Quality control

is vital? Invite a world-class chef to discuss quality under pressure. New perspectives provide a unique environment for learning.

6. Make the event conducive to learning

- Is the venue big enough, with good seating, lighting, and technology support? Consider round tables, allowing more interaction and collaboration.
- Shape the content to be interesting and informative. For example, a mix of:
 - Keynote speakers, to present and stimulate new ideas in an entertaining way;
 - Workshops, to provide a forum for sharing ideas; and
 - Fun, physical, team-building activities, to help bring more focus and creativity when participants return to the main learning environment.

7. Linking is vital

- An independent facilitator can open up and link discussions that a boss might inadvertently stifle. It also frees the boss to contribute as a member of the team.
- Some teams maximize value by linking to a key external event like the ACC annual meeting. They hold their own meetings first, for a real learning bonanza.

8. Schedule a key ideas workshop

- To conclude, invite participants to identify the three best ideas they've learnt.
- These summaries not only draw together all the good ideas, but they can also be packaged into a larger summary document, aiding later evaluation.

9. Schedule a post-event workshop

- Presentations and workshops draw out great ideas, yet seldom provide a



Team Games—Holding back water in a vessel with more holes than even the legal team has helping hands.

framework for reflection, let alone action.

- A post-event workshop offers participants the opportunity to explore the best ideas and lift the rate of their execution.

10. Have fun

- Several days of work may be counterproductive if a key objective is team building. Fun activities help break the flow, and provide time for reflection and recharge.
- Tired of boring PowerPoint presentations and smug presenters? Ditch them.
 - Limit the number of PowerPoint slides and the number of words on each slide.
 - Find a different venue. I once used an island, and I've heard about a warship. Get out of the dreary old conference centers.
 - Schedule a fun event, not just the usual dinner. I've transported peo-

ple to the venue by gondola and luge, and walked along cables in treetops. I've even scheduled a surprise firewalk over a bed of hot coals (admittedly in a jurisdiction excluding personal injury litigation).

- Make it a surprise, make it fun, but also let people opt out if they want to. It's about teamwork, not peer pressure.

And if you feel the need to organize something truly and memorably off-site, I can recommend the team-building diversity and beauty of New Zealand, Australia, or the Pacific Islands! 🗺️