



Strategic Steps for a Successful Leadership Team Retreat

Define the Purpose of the Retreat

The most important ingredient for a successful retreat is a clear and meaningful purpose and desired outcomes. This may be broad, such as refreshing, recharging and resetting the direction of your team. Or, it may be more specific, such as developing strategic plans to improve stakeholder satisfaction survey results or implementing specific organization initiatives.

Decide on a Retreat Facilitator

The planning a successful leadership team retreat takes a good amount of time. If the leader of the team will be doing the planning, he/she will need to begin well in advanced of the date of the retreat. The leader of the team may facilitate the retreat, with the understanding this will limit their ability to fully engage as a participant. Alternatively, an experienced outside facilitator may be hired to plan and facilitate the retreat.

Develop the Agenda for the Retreat

The agenda should include a variety of activities and exercises, including small and large group discussions related to these important objectives of the retreat:

- Strengthening relationships of your team members
- Reviewing the past year (successes, challenges, measurable data such as financial information, stakeholder satisfaction survey results and/or other quality indicators)
- Training content to support the purpose and desired outcome
- Collaborative strategic planning for the coming year
- Having fun



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Identify Who Will Attend the Retreat

Generally speaking, you will want all members of your leadership team to attend. Depending on the purpose of your retreat, you may also want to include other people who would add significant value to conversations or would gain significant value from participating.

Choose a Site for the Retreat

Retreats are best when they are held off-site so that your team is able to fully detach from the operation and give their entire attention to the activities of the retreat. The site should have space available for tables and chairs to accommodate all attendees sitting in a U-shape and areas available for attendees to break out and meet together comfortably in smaller groups for collaborative sessions. The site should be able to provide morning and lunchtime refreshments or allow you to bring them in yourself.

Schedule the Date for the Retreat

Before scheduling the date, ensure that all attendees are able to attend the entire event. Once the retreat date is scheduled, send out a “save the date” notice to all participants with the location and time of the retreat 30-60 days prior to the event.

Prepare the Participants for the Retreat

At least 3 weeks prior to the retreat, provide the following information to all participants:

- The purpose of the retreat.
- Any questionnaires or assessments you want them to complete prior to the retreat.
- Any specific questions you want them to think about and be prepared to answer at the retreat
- The location, dress code and anything they need to bring to the retreat.



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The Retreat

At the beginning of the retreat, specify when breaks are scheduled, protocols for cell phone use and the importance of maintaining confidentiality of discussions. Encourage openness, honesty, and to question and challenge each others' ideas (questioning and challenging the *ideas*, not the *people*).

At the conclusion of the retreat, it is important to unite the participants around their agreed-upon shared purpose, priorities and strategies for the coming year, as well as the actionable objectives and next steps.

Follow-up After the Retreat

In order to maintain the positive momentum generated from the retreat and translate the agreed-upon actionable objectives into action plans, a follow-up meeting should be scheduled for all the participants within 2 weeks of the retreat. During this follow-up meeting, ownership and timelines for each action plans must be defined.

To ensure the leadership teams maintains their focus on completion of action items, the team leader must continually reinforce the learning lessons and schedule regular follow-up meetings for team members to report on the progress of their action items. This is best accomplished in team meetings which will allow for team members to ask for or offer support and to provide opportunities for the team to celebrate accomplishments.



“If you are exhausted from heavy workloads and having to balance the evolving and often competing expectations of senior management, front-line staff and customers, leaving you with little energy for yourself or loved ones...let me show you how to **“Live Well by Leading Well.”**”

BRUCE BERLIN

“Bruce inspires teams to think bigger, bolder and from a perspective that promotes growth and trust. His leadership retreats equip our team to think collaboratively and with confidence and commitment to each other. Bruce helps us to lay the foundation that has made us a strong team because of his expertise and direction.”

ERELYN HICKS
EXECUTIVE DIRECTOR



Where Loving-Kindness Lives



“Bruce’s understanding of employee engagement and the importance of employee morale to delivering outstanding customer service is impressive. His leadership retreats always result in great learning, camaraderie and new resolve in working together. Bruce has the ability to bring fun, learning and dedication to any team.”

SHERYL MESSENGER
DIRECTOR OF HUMAN RESOURCES

“Bruce does an amazing job planning and executing leadership training programs and retreats. He keeps his audience engaged and provides very useful information that can be immediately put into practice. His attention to detail and real life examples make for a great experience for the entire team.”

SCOTT CAIRNS
REGIONAL VICE PRESIDENT



“Bruce’s leadership retreats are fantastic! He does a great job of building in learning, strategic planning, relationship building and fun. We always come away from his retreats with renewed enthusiasm, energy and clear direction.”

MARILYN HOFFMAN
VICE PRESIDENT

“I really liked the flow of the meeting and the brain storming groups. I loved how in the end we were all coming up with the same conclusions. Bruce led us so skillfully in a way that was not forced or rushed.”

“I absolutely loved how we learned as a group how to prioritize a goal and work towards it. We have not ever done this as a team. It will make Lakeview Village the best place to live, work and grow.”

