



Five steps to successful strategy offsites

A great strategy offsite leaves fingerprints on the business – a bad one only leaves fingerprints on the glasses in the bar.

Most companies hold strategy offsites. A lot of investment goes into them and expectations run high. But consider your last strategy offsite? Was it just a bonding exercise or did it leave fingerprints on the business?

Your answer might depend on your job title. When it comes to strategy offsites, many CEOs seem guilty of wishful thinking. Done well, strategy offsites can energise your management team and have a performance impact – done badly they quash enthusiasm and can leave you stuck in neutral.

In our experience of over 45 strategy offsites, there appear to be a consistent five steps to a successful strategy offsite:

Step 1: What does success look like?

Get together with your senior managers, or some of your non-executives, and talk through the following: Why hold an offsite now? What will success look like at the end? What are the key issues facing the business?

Think about whether you need external help. Many CEOs tell us that by using an external facilitator they can go deeper into the big issues and are spared the responsibility of managing what is frequently an emotive, political process.

Step 2: Preparation is key

Strategy offsites require precious management time and include discussions on critical business issues. The price paid for poor preparation is high, whether in delayed strategic decisions or misaligned management teams. Start your preparation early, good practice is to start at least six weeks in advance.

Seek input. Have one-to-one structured conversations with industry experts, customers and your management team. Ensure you get honest, objective feedback. What are the opportunities and threats facing the business? How can the company grow revenue and become more competitive? What major concerns do people have? How will the budget process be integrated with the offsite? Document the key issues which the offsite will address.

Step 3: Build a structured agenda

Too many offsites suffer from over-stuffed agendas, political considerations, and a lack of conclusions. A tight, structured agenda is far more effective than a loose one, and helps prevent drift, keeping a focus on results. Prioritise. Ensure the agenda drives strategic issues, rather than just operational ones.

Don't expect your team to strategise on demand. Open ended discussion may not be the best way to foster creativity. A good agenda has triggers and catalysts that ensure meaningful conversations. Think about what tools to use, how to keep energy high and people engaged? Be clear as to who is presenting what and how to capture outputs? Circulate an information pack, including budgets, well ahead of time so that everybody is fully briefed.

Step 4: Facilitate the offsite

The challenge when facilitating offsites is finding the right balance between contribution, advocacy, debate and alignment.

No amount of preparation can stop discussions going off in tangents, and ending in dead-ends or log-jams. Frequently emotions run high. It can be a challenge to know when to intervene and how to divorce an initiative from its owner.

Ideally, the atmosphere is structured yet flexible, allowing participants to voice opinions without losing sight of objectives. Flip charts, powerpoints, and post-it notes help structure discussions and clarify decisions. But beware of powerpoint death marches and flipchart folly. Appoint someone to play devil's advocate or surprise your team with fun role-playing.

Step 5: Follow Up with a committed action plan

The offsite may have been successful in agreeing actions on key issues, but without a planned, structured follow-up, it's likely that the decisions will never be implemented.

A couple of weeks after the first offsite, get your team together to assign specific tasks and agree measurement criteria and short-term targets. The process isn't over until everyone is using their particular skills to achieve the agreed outcomes.

Insight in Brief

CEOs are more likely than others to think strategy offsites are successful, but if participants aren't feeling it, it's probably not happening. Successful offsites are the result of careful planning, good facilitation and structured follow-through.

Companies that follow five simple steps ensure ensure that their strategy offsite leaves fingerprints on their business.

Insight in Action

1. Be clear on the key issues to be addressed and resolved in the offsite.
2. Prepare well. Seek input from customers, industry experts and within the business.
3. Don't over stuff the agenda. Ensure that time is allowed for the key issues. Circulate a thorough information pack in advance.
4. Facilitate the process using the right tools to structure discussions and clarify decisions.
5. Follow up well with a structured meeting to ensure specific tasks, measurement criteria and short-term targets are agreed.