

How to Facilitate a Top Team Retreat

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My belief is that the key role for HRD professionals is to help business leaders successfully bring about change and meet the challenges of the 21st century.

The function is more likely to be seen to make a cost-effective and strategic contribution if it facilitates organisational change and renewal, rather than delivering expensive and hard-to-justify traditional courses. One way of doing this, which puts HRD at the heart of the business, is to facilitate strategic team retreats.

Getting Entry

An event like this may emerge from discussions about difficulties in bringing about change. Of course, you must have credibility with the people concerned before they will ask for your help. You need to have built the relationships and to be trusted by everyone concerned. To have earned that credibility, you will have made a lot of friends in your organisation and asked a lot of useful questions. People will trust you sufficiently to tell you how they really see things.

Building Readiness and Contracting

Often the idea of a retreat will emerge from a conversation with the leader. This can begin by your asking questions like: How are things are going? What is getting in the way? How would things be if everything was going well? Maybe at this point you can suggest a top team retreat. In that case, defining its purpose and outcomes are essential. Then you need a similar conversation with other members of the team. Aim to build readiness; develop your relationship with them; get a good understanding of the issues, plus a diagnosis, and define the purpose and desired outcomes.

You can start sketching a proposal to present to the leader and then the whole team summarising the issues, the purpose, the desired outcomes and an outline of the proposed agenda. It is crucial you let go of control to help the team express their resistance, fears

and doubts, so they can co-create and own the event. Be flexible about everything except what really matters!

Typical Agenda

Here is a typical agenda for a retreat, to have at the back of your mind:

1. **Our Business Environment:** What is affecting us or likely to? What are the key trends and the big issues? See them as opportunities to do better business. Encourage the team to think divergently, boldly and not just in narrow business terms. The more you leave them to do the work, the better. Hang loose but challenge them! I get them to do a lot of work with post-it notes on a wall, encouraging them to see the patterns in an initially complex and confusing picture. Stay quiet, but be prepared to challenge. Invite them to boil it down to major trends and opportunities.
2. **Rigorously Review the Current State:** How well are we responding to the business environment? Do a SWOT analysis. Ask them about the organisation's contribution to sustainability and corporate social responsibility, about its culture, health and diversity, among other things. Does it encourage honesty and criticism?
3. **Our Purpose & Values:** Ask: what is our inspiring corporate mission, our unique difference?
4. **Our Vision of a Desirable Future:** Organisations thrive by changing the world (eg Ford model T, Microsoft, Boeing 747). Get the team to discuss their vision.
5. **Strategy:** To bring about the vision: how will the team involve people, engage their hearts and collective intelligence in creating change – what is its leadership role?
6. **Key Issues:** How do team members need to transform themselves to provide inspiring, enabling leadership? Get them to give honest feedback to each other.
7. **Implementation and Support:** How are they going sustain and review this strategy? How will they involve people in the creation of these changes? Who are the key stakeholders we need to engage? What challenge and support do we need to provide ourselves?

This is about two days work. It is crucial to get people off site and better if residential. Returning to the day job during the review should be banned.

After the event or as part of it, the top team may need to take its strategy to a larger group of people representing the whole organisation and even its key stakeholders. The leadership needs to invite them to say what they like about the strategy and must demonstrate willingness to revise it accordingly. A well-designed event should enable everyone in the room to take responsibility and make plans for implementation.

One thing is certain. Implementing change and changing behaviour are not easy. The day job and resistance will get in the way. You need to work with resistance, not against it. It is naïve to think one event will be enough. It will require a succession of follow-ups and you may need to offer to mentor people in between. It is essential that top teams hold events to review the results of their retreat.

If HRD people are to meet the challenges of their role, thorough training in consulting and facilitation skills is essential. If they do not have the credibility to work with the most senior people, or feel they are too involved in the issues, they need to bring in highly competent outsiders. Outsiders can teach them too

Often they will be able to do this work and greatly enhance their contribution. It is difficult work and it is good practice to have peer support or, for critically important work, outside supervision or a “shadow consultant”.

But it is exciting work, at the heart of the business!

Bruce Nixon, Berkhamsted, UK. Facilitator, mentor, coach and author of *Making a Difference — Strategies and Tools for Transforming your Organisation 2001*, isbn 1-85252-353-0 and *Global Forces — a Guide for Enlightened Leaders — what Companies and Individuals can Do*, 2000 isbn 1-85252-353 25-7-2003

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