

Team Retreats

This course is designed to help you understand the importance of team retreats and create a plan to execute your next retreat. By the end of the course you will have the best practices and resources needed to engage your team in a productive team retreat.

By the end of the course, you should be able to understand the importance of holding a team retreat, use best practices to plan a successful team retreat, effectively follow up to the team retreat.

Overview:

In this course, we'll share the key components of executing an effective team retreat, one that creates an environment where the entire team can move forward in the same direction with a sole purpose and focus. Without the clarity and communication of the firm's mission, vision, and value story, your team will be lacking continuity and focus to reach your goals. If even one person on the team is rowing in the wrong direction, you drastically decrease your odds of reaching your highest potential.

"If you could get all the people in an organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time."

— Patrick Lencioni, *The Five Dysfunctions of a Team: A Leadership Fable*

We'll also touch on how a retreat creates an opportunity for your team, even if it's only one other person, to have ownership in the goal setting process. Having the team come together and be a part of the goal planning and initiative building is a great way to deepen their commitment to the outcome. The ultimate result is a more inspired group that is focused on activities that will move the needle closer to your ultimate business goals. Goals that you and your team feel driven to achieve.

The high-level steps are:

- **Step 1:** Understanding the importance of team retreats
- **Step 2:** Planning an effective team retreat
- **Step 3:** Following up after the retreat

With all that is going on it might seem easy to skip out on a team retreat, however, this one day may be the most important one of your entire year!

Step 1: Understanding the importance of team retreats

"Teamwork divides the task and multiplies the success. "
~ Unknown

Whether you have a team of three or thirty, the execution of a well-planned team retreat creates a foundation for the team to grow. As your business grows, so should the individuals inside your organization. However, that growth doesn't occur without dedicating specific time for you and your team to work through the mission, vision, and strategy for the next year. Even if the vision and mission haven't changed in the last 3 years, the value of coming together and reinforcing the "why" of what you

do, and why you do it is meaningful.

Think of it in terms of any successful sports team. The goal of the team is to win. Each member of your team has a crucial role to play in the overall goal of your firm's growth, so it only makes sense to invest time with each of them to clarify how their individual efforts, mixed with those of the team, contribute to your vision. Without this annual "huddle" your team is left directionless and uninspired.

Your team members cannot recharge and are unable to deliver your vision of a successful practice, or even understand how your version of winning looks, if you don't emphasize your "why" at least annually in a focused setting. A good indicator that you have had a successful retreat is that your team is excited and engaged about the vision and second, everyone understands the goals for the next year and what each person is responsible for, to make the goals a reality. If you are successful, the team will be both and engaged and excited about the year.

And it's not just for re-engaging your team. Your "game plan"—the company's infrastructure, systems and processes – must also be regularly reviewed and updated to enable your team members to succeed. One consideration you should take is to dust off your **Blueprinting**, or if you haven't completed a Blueprint, now is a great time to get started. Check out our course on **Blueprinting** for more information.

The retreat sets the stage for the year for alignment, but it also provides an opportunity to focus on the culture of the team. Team culture is not something that is declared, it is developed overtime and with intention.

Follow the best practices in the next lesson to plan a meaningful retreat.

Step 2: Use best practices to plan a successful team retreat

Even with good leaders and an A+ team a company immersed entirely in the minute-to-minute operations of its business will not achieve its highest potential. And this is exactly why team retreats are a must in terms of helping your firm move forward in a healthy way. So where do you start?

Step 1: Set a Date for Your Team Retreat:

As with any event, begin with scheduling a specific date on the calendar. Share this date immediately with your team to give them as much notice as possible as attendance should be mandatory. As far as when to hold your retreat, think about what will be most convenient for your office. Some firms plan this event towards the end of the year while others prefer to hold it on a day when the markets are closed, like Martin Luther King Jr. Day in January, which allows for the opportunity to review the previous year's key performance metrics with the team.

If you are opting for smaller, quarterly retreats, be sure that you are planning those for the whole year in advance. Even if you are planning one annual retreat, create shorter follow-up meetings, or make time for follow-ups in the regularly scheduled team meetings.

COACH TIP: If there is more than one business owner, or decision maker on the team, schedule a pre-retreat planning meeting at least 3-4 weeks in advance of the team retreat.

Step 2: Reserve a Venue for the Retreat:

Once your date is set, think about where to host it. Team retreats seem to work best when held away from the office and should last anywhere from a half to a full day, likely the latter if you have a large

team. Taking your team outside the walls of your office can have a positive impact on your team's mindset and will provide a neutral environment where everyone feels comfortable. Having an off-site event can also double for a new opportunity to add a fun team activity at the end of the retreat.

Step 3: Hire a Facilitator or Content Specific Speaker/Consultant:

Determine if you'd like to hire a facilitator for your retreat. We find that hiring someone for this role allows the advisor to be a participant vs. leading the discussion. In addition to directing the conversation throughout the day, the facilitator can also function as the recorder for capturing key points from your group. Following the retreat have your facilitator provide a written summary detailing the discussions, decisions made, and next action steps.

Another option is to bring in an expert or consultant either virtually, or in-person to conduct part of the agenda. For example, you may decide to bring in a Practice Management Consultant, or Coach to handle the SWOT analysis or goal setting portion of your meeting. Another opportunity would be to use some of the time to review any type of assessments you use within the team to help one another better understand each other. Some popular assessments include Kolbe®, DISC®, Strengths Finder® and Myers Briggs.

COACH TIP: Connect with your Carson Coach, or the Carson Community via the Community boards in Carson Coaching Online to see what activities, tips, or resources that they have found useful for their team retreats. In addition, explore other resources that might be available to you, such as any B/D resources, professional networks, wholesalers, classic consulting/facilitating services from local colleges and universities instructors

Step 4: Create an Agenda:

Once these details are clarified, it's time to prepare you and your team for the topics to be discussed. Encourage your team to add ideas for the retreat throughout the year by placing a document in a location where everyone can make additions to the agenda.

Some popular agenda topics include:

- Review the mission and vision statements
- Assess progress towards team and individual goals
- Initiative Creation
- Plan and schedule future events
- Make changes to annual survey
- Determine gifts for male and female A+, A, B, and C clients for next year
- Review marketing materials, logo, and brand
- Define social media presence
- Focus on systems development

- Focus on employee development and training
- Discuss the impact of any changes in the industry (e.g., compliance, tax changes, etc.)
- SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)

Agendas are not always a one-size fits all situation. We have compiled several different agenda styles that can support you in creating a meaningful agenda for your specific situation and team.

- **Full-Day Team Retreat Agenda**
 - A detailed agenda lining out the plan for an all-day team retreat, including a SWOT Analysis and Strategic Initiatives planning
- **Entrepreneurial Operating System (EOS) Style Team Retreat Agenda**
 - Best executed on a quarterly basis and follows the theory of the popular Entrepreneurial Operating System
- **High-Level Team Retreat Agenda**
 - 8 keys areas to cover to create an impactful meeting
- **Outcome-Based Team Retreat Agenda**
 - An organic style, team-centric, outcome-based approach to the agenda

COACH TIP: Many of our Advisor offices and Carson Group are utilizing the methods of the Entrepreneurial Operating System. Find out more about EOS® by reading Traction by Gino Wickman or visiting <https://www.eosworldwide.com/>

Don't forget that this is a great opportunity to enhance and reinforce your culture. Many teams use this day as an opportunity to celebrate and have some fun. You can add in a few breaks throughout the day, or even have the whole team enjoy an activity at the end of the day. If you don't have time to add an activity, use this time for the team to decide the type of activity that they would like to participate in the future.

Here are some ideas for team activities:

During the meeting:

- Pass around different color starbursts and have each color associated with a question
- Break into teams and play Mega Jenga
- Have an ice breaker question between agenda topics
- Culture / Brand exercise – have the team bring logos or algins of other companies and place them around the room. Have the team members write on sticky notes how they related aspects of that brand/culture to your firm

- Strength Sharing Idea – Identify one team member and have each team member state one positive attribute or strength of the team member. Repeat the process for each team member.

After the meeting:

- Go to a Spa
- Go to a sporting event
- Cooking class
- Dinner at a nice restaurant
- Attend a show or play
- Team Happy Hour
- Bowling
- Escape Rooms
- Axe Throwing
- City Scavenger Hunt

Keep in mind that people will be tired after, be careful to choose an event that may not require much mental challenge. Another option is to schedule the fun/team building activity for another day, if you want to have a mentally engaging activity.

COACH TIP: Looking for a way to get the team even more involved in ideation for the firm? Try something like a mini version of Shark Tank where the team can submit ideas for the firm and present the day of, or before the retreat.

Regardless of the Agenda you choose, one of the keys to having an effective agenda is to plan by starting at the end. Know what you want to accomplish beforehand. Identify your desired outcomes and prioritize them to determine how much time you will need to be successful.

Step 5: Host Retreat:

Finally, host your meeting and establish action items for each member of your team. This is the most important step in the process!

Here are 12 best practices to keep in mind to execute successfully:

1. The agenda should be sent to team members prior to the retreat so they have time to prepare their thoughts.
2. Establish ground rules so everyone is engaged. Have a policy for cell phones, laptops, etc.
3. During the retreat, if the advisor is acting as the facilitator, remember to listen twice as much as you speak and be open to all ideas.

4. Not everything will go as planned, be willing to be somewhat flexible, but also stick to the priorities. If something is important to the team, but you are running out of time create a specific follow-up for that topics
5. Use a parking lot! Team events often can spur a lot of ideas, as we know we cannot execute on everything! Use a white board, or easel with paper to hold ideas in the “parking lot” which are something you want to explore, but not immediately.
6. Use a timekeeper to stay on-track.
7. Take good notes or have a team member take good notes and share them with the team.
8. When there are opportunities to get the opinion of the team consider using secret ballots to submit ideas. Some team members may be unwilling to share, or automatically agree with a leader. If your team has no hesitation in sharing their opinion you can just ask them to participate.
9. Build in small breaks throughout the day. These retreats can often take a lot of energy from the team, be sure to give several breaks and have some snacks and beverages available to refuel.
10. Bring in lunch for the meeting. Be sure to cater to everyone’s dietary needs and bring lunch into the meeting. While going off-site for lunch might seem fun, it can eat up a lot of valuable time.
11. Location and environment are important. Find a location where everyone feels comfortable being away from the office and have team members dress comfortably to promote optimal thinking.
12. Retreats need to create direction for the future, so initiative creation is an essential component.

Next, we will cover how to create an effective follow-up plan to the retreat. Remember, a failure to plan, is a plan to fail!

Step 3: Following up after the retreat

Some firms choose to incorporate retreat item updates into current standing meetings. However, they can be specific, separate meetings created solely for the purpose of retreat initiative follow-up. The specific format should reflect your style. What is required is that everyone knows consistent follow-up will occur, so these initiatives stay top of mind and consistent progress is made throughout the year. You might consider having the same specific questions used at each meeting, such as:

- What has been accomplished since the last meeting?
- What will be completed prior to the next meeting?
- What roadblocks are keeping the strategic initiative from moving forward?

This may sound like a lot to keep track of, but with the right template in place you can begin easily filling in the details – and that’s exactly what we’ve given you in this lesson to help you along the way: our [**Team Retreat Quarterly Update Tracker**](#).

Your retreat may only last one day, but the work generated from each of the goals established during this one-day event have long-term effects throughout the course of the entire year and ultimately your

success as an organization.

Summary:

Bringing the team together on an annual or regular basis is about more than just sharing the metrics of the business. It is about bringing the vision, mission and value the firm provides to life. It is a collaborative environment in which all team members have an opportunity to provide their input and feedback. Engaging the team allows them the opportunity to connect more closely with the firm, and each other. In order to have a successful team retreat it is important to take the time to plan for the day, by following these steps and best practices:

- Develop a clear understanding the importance of team retreats
- Planning an effective team retreat
 - Step 1: Set a date for your team retreat
 - Step 2: Reserve a venue for the retreat:
 - Step 3: Hire a facilitator or content specific speaker/consultant
 - Step 4: Create an agenda
 - Step 5: Host the retreat
- Create specific ways to follow ad track goals and initiatives after the retreat

FAQs:

- **We are already aligned well, so why should I do a retreat? What are the main benefits?**
 - Well-done retreats generate two powerful results. First, your team is excited/inspired about the firm's mission, how they impact people's lives and where they work. Second, everyone is on the page about the initiatives and those responsible for taking action on them over the next year. I always seem to be too busy to spend the time prospecting. What should I do?
- **Do I really need to find a location away from the office?**
 - In a perfect world...yes! You want to be completely focused on the retreat. You don't want any outside distraction. If you have the space or can somehow truly 'feel like you are out of the office' you could stay in house.
- **Is an outside facilitator needed?**
 - Needed no; optimal, yes. Try to find a professional to facilitate the meeting for you so you can be a participant and leader. Tap in local colleges and universities for consultants who specialize in strategic planning. Also consider the use of wholesalers or other B/D resources. Use your networks and all options to find a facilitator and facilitate the meeting yourself, only as a fall back option.

Resources:

Learn more and download the resources referenced in this document from the *Team Retreats* course in Carson Coaching Online.

- **Blueprinting Guide**
- **Team Retreat Quarterly Update Tracker**
- **Full-Day Team Retreat Agenda**
- **Entrepreneurial Operating System (EOS) Style Team Retreat Agenda**
- **High-Level Team Retreat Agenda**
- **Outcome-Based Team Retreat Agenda**
- **Clifton Strengths Assessment**
- **DISC Profile**
- **Kolbe A™ Index**
- **Myers Briggs Type Indicator (MBTI)**
- **Book Recommendation: Traction (EOS) by Gino Wickman**