



Not just fun in the sun! Designed by Grand Dynamics, this activity (part of a retreat done by Unparalleled Productions) ties into the retreat theme of leading change. Courtesy: Grand Dynamics

by Rachel Globus

How to Make Taking a Step Back a Successful Step Forward

There was a time when retreats could have used a good PR manager. In 2001, a dozen Burger King employees burned themselves when attempting a fire walk as a team building exercise. In March 2003, Karla Corcoran, inspector general of the United States Postal Service, resigned amidst public outrage over what was deemed excessive expenditure of public monies for postal workers' corporate retreats—which included building sandcastles and gingerbread houses and wrapping each other from head to toe in toilet paper, aluminum foil and pipe cleaners. Add to that the weak economy as the country struggled to beat the post-9/11 recession. Lean times brought increasing scrutiny on budgets, especially on any activity that did not explicitly contribute to the bottom line, such as corporate retreats. Were they on the brink of extinction?

Well, yes and no. With the country's economic recovery in the past few years, money has once again started to flow toward corporate retreats. But today's retreats are of a much different variety than those lavish holidays of yesteryear. They are leaner, stronger and smarter; they require careful logistical and strategic planning; and they speak the language of ROI. Yes, a new breed of corporate retreat has arrived in town, and it's not a golf vacation in Maui. Would

it kick sand in the face of the corporate retreat of old? Most assuredly. But that's why we love it. To make sure your next retreat is up to snuff—and delivers the business results your company needs—read on.

Meet the New Corporate Retreat

Today's successful corporate retreat is more than just fun in the sun—but that doesn't mean your attendees shouldn't have fun. "I think the future of incentive retreats—particularly with the economic impact of the Sarbanes-Oxley Act—is going to be about, how can you reward employees yet still add some value other than just giving a fun experience?" says Tim Walther, president of experiential training company Grand Dynamics. "How can you have both? I don't think it's an either/or. So when you look at incentives, you can have a retreat that is not only a reward and a fun experience for the participants, but the question is, how can you also integrate programs that will facilitate the business development as well?"

First up in the planning stages of the retreat is assessing your own needs. What are your prime dates? How many people are attending? How much time do you have? What does your ideal location look like? Keep in mind that some locations may have limited availability at certain times of the year. When Jenna Mack, principal of Event Emissary, was asked at the end of September to begin planning a meeting in Washington, D.C. set for April 2006, she eagerly took on the task, despite the short lead time. After two weeks of research, however, she had to inform the client that since April is peak season in the nation's capital, there wasn't a single hotel that could accommodate the group. "If you're doing a peak season program, you should be planning a year out—or more," she recommends.

Planning as much time as possible can also maximize ROI. "From a training and development perspective, it's so much more beneficial to have multiple days—a four-day versus doing a short-term team-building event," says Merianne

Liteman, president of Liteman Rosse Inc., a consulting firm specializing in designing and facilitating off-site retreats, and co-author of *Retreats That Work*.



Grand Dynamics leads a team through an experiential learning initiative in Jackson Hole, Wyo.



Not for the birds: A retreat attendee finds a creative way to express that the group must taking bold steps not be "chicken" about to advocate on behalf of its members.

Depending on a group's level, however, you can achieve "some pretty stunning things" in just a day, she says.

The number of people attending also affects the type of accommodations available—for example, if you're a group of 100 people, don't expect to rent out a Scottish castle. Mack also recommends finding locations that will cater primarily to your group. "We steer clients away from the big hotel chains, and we steer them toward either renting a private property or going to a smaller hotel where their group is going to be at least 50 percent of the size of that hotel," she says.

The location should also appeal to your guests, and facilitate their accomplishing the goals you have set. "Consider your target markets—consider the people that are going through the retreat so that the content is appropriate and the design of the things you're providing is appropriate," says Walther. Is your group a board of directors that wants to be free of distractions? Then perhaps the hotel in the center of Florence isn't such a good idea. On the other hand, the remote lodge in Canada—perfect for your board of directors—may not be a successful incentive for a group of salespeople.

What's outside your venue is also as important as what's inside, as nature can offer a stimulating change from the usual business settings. "[Participants] have a very different response to questions when they're out walking and just being in nature than sitting around a table. So it just adds a whole other venue that you can be in," explains Liteman. Access to nature, windows, natural light and flexible settings are also features Liteman says are important for a retreat venue. "We move people to work in different groups almost constantly, so our nightmare is the hard table setup and board meeting style. Anything that's formal and rigid is not our ideal."

Be in the Know

Once, early in her career, Liteman interviewed the CEO of a company in the stages of retreat planning who painted the picture of a happy organization that just needed a little polishing up around the edges, convincing her that there was no need to interview the employees beforehand. Near the end of the retreat, attendees were asked to come up with a creative way to show how the corporate culture manifested itself and what they might like to do to improve upon it. The activity went smoothly until the group that had asked to go last went up—



Who said team-building events were easy? Here, an attendee negotiates "Islands in the Sky," learning to take risks, and that seemingly impossible tasks can be accomplished by breaking them down into smaller steps. Courtesy: Adventure Associates

carrying picket signs reading “THE TRUTH MUST BE TOLD!” What was “the truth”? A none too pretty picture of the CEO. “There was no time to fix this,” says Liteman. “We were just moving toward closing down the retreat, and it did tremendous damage to everybody.” The instigator of the impromptu protest ended up being fired, and the carefully-orchestrated strategy for bolstering company morale over the previous two days was severely undermined.

The moral of the story? Know before you go. “Successful retreats are those that really are careful to tie into the real-world activities that they’re all involved in. So that’s why we like to do an assessment before the retreat and look at what team-building issues the team wants to work on,” says Angie Feehan, marketing director of Adventure Associates, which specializes in team building and corporate training. “One of the worst things you can do is have a retreat, and you bring in a speaker and you do these activities, and none of it really feels like it pertains to the participants because care hasn’t been taken to customize it, or perhaps they’re being a little lofty in their training goals.” Adventure Associates administers a confidential, online survey to attendees to assess their needs as part of its planning stage. Liteman suggests interviewing employees.

Getting to know attendees’ needs and interests beforehand also helps you identify cultural or physical factors that may come into play—so you don’t learn on the day of the retreat that one of the attendees is quadriplegic, as once happened to Liteman. She now recommends specifically asking about or determining any special needs beforehand. Cultural factors also affect people’s comfort level with certain activities—physical closeness, disclosing very personal information and challenging authority, for example, are all actions that different cultures handle differently, and the planning should take this information into account.

Learning styles—auditory, visual, analytical and kinesthetic—also dictate the types of activities that will be most successful for different attendees, says Anne Thornley-Brown, president of Executive Oasis International, a consulting firm offering executive retreats. For example, if you don’t leave enough time for participants to go over the results and applications of a certain activity, then the analytical learners, who learn best by thinking things through, will not maximize the value of their time.

Equally as important as knowing your audience is knowing yourself. “We spend a whole lot of time sitting down with the [retreat convenor] and actually asking them to tell us what success looks like. What do they want to walk away with at the end of the day? If something happens that surprises them or us, how do they want to handle it? If they’re not happy about the way things are going at the retreat, how do they want to handle it?” says Liteman.

Was there any way to fix the problem with the picketers? Liteman says that focusing attendees not on what they don’t want, but what they do want—i.e., on the solutions rather than the problems—would have been the best way to handle that situation.

Creating a Successful Experience

When Thornley-Brown designed activities for a public workshop in Kuala Lumpur, she took a page from “The Donald’s” event planning book, creating an “Apprentice”-style program in which attendees generated a sales and marketing strategy, came up with a target audience, and then hit the streets to sell the product—lemonade. One team positioned it as a solution to the thick haze that had settled on the city at the time (neighboring Indonesians were burning brush to prepare for the next planting season) by selling the refreshing drink with a free dust mask. “Then when we did the debriefing and applications, they were able to do the same thing for their own business challenges,” recalls Thornley-Brown. “I think that by actually having them go out and do it, it was much more effective than if we had just talked about it.”

The key to the success of the retreat? Creating an experience that was carefully designed to reinforce or teach targeted business skills—which you identified in your pre-retreat survey, of course.

Who Needs a Facilitator?

At one corporate retreat, attendees began giving angry responses only 15 minutes into the session. The facilitator, who hadn’t interviewed employees before the retreat, made a dangerous error in managing the situation, dismissing it by saying, “I don’t know anything about your situation.” Had he done his research, he would have known that they had just undergone a vast downsizing effort and adjusted his style accordingly.

It’s an easy mistake to avoid, says Liteman, if the facilitator does his or her homework. “Retreat facilitation is eight hours of improv. And improv, when you’re watching it, looks very spontaneous. But of course there’s a lot of preparation that’s gone into it, and it’s the same thing with a retreat,” she explains. “It needs to flow and be natural and be very responsive to what’s happening in the room; at the same time you have to have done a whole lot of thinking and planning as a basis that allows you to go and be free when you go into the room.”

Facilitators should be independent from the group (and therefore objective), highly ethical (so that they hold attendees’ input in confidence), and able to move the group along in the learning process. “They are there to make sure the team has and shares a unique experience that provides them with some really valuable insights that they can take back to their workplace,” she explains. “So they won’t give you the answer to a puzzle. They want the group to figure the puzzle out. That’s the nice thing about experiential learning—the group can



By working in silence to create a collective collage that represents their hopes for their organization’s future, these retreat participants will have much richer conversation once they can speak to each other.

actually drive what happens in that day almost as much as the facilitator directs it.”

Getting the Return on Your Investment

The final key to a successful retreat is the debriefing and follow-up. “It’s very important to debrief an experience to give people a chance to think about it, reflect, figure out what they’ve learned and how they can apply it to the business context and how they can really take it back with them to the world of work,” says Thornley-Brown. “You have to be thinking about implementation before you walk into the retreat,” adds Liteman. “The reason why most strategic plans fail—and most retreats fail—in their intent is that people went into the retreat very busy and then they come up with all these wonderful ideas for changing things but they don’t let go of anything. And so part of the work of almost any retreat is to say, ‘If these things are truly important to us, what is it that we can stop doing or do in a different way that will allow us to do these things?’”

Although we intuitively sense the value of investing in employee morale, personal development, communication and other so-called soft skills, it’s notoriously difficult to assign a dollar value to them.

But, significantly, neither is it impossible.

Are there hard numbers to support the value of corporate retreats?

William

Schwab, CEO of the Construction Financial Management Association, would say so. Chapter presidents of the association who attended the annual retreat had a net annual membership growth rate of more than 10 percent and a membership renewal rate of 81 percent, compared with the average renewal rate for associations of 75 percent, the New York Times recently reported. Chapter presidents who never attended had a 19 percent membership loss in the same time frame.

To Walther, whose company designs the association’s team-building activities, this came as no surprise. “What I find is the good companies, the ones that are successful...the ones that don’t see this as a one-shot wonder— they do take the time” to make measurements, he says.

Corporate retreats have come a long way in a short time, and they now stand out as shining examples of how an industry can reinvent itself to accommodate a rapidly changing environment. Better tell your old corporate retreats to watch out for their lunch money.