

Offsites 101: What you need to create successful away days and strategic planning sessions

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First published 2017

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Tonkin, Cindy, 1963- .

Offsites 101

New ed.

ISBN to be confirmed (eBook)

Publisher: Cindy Tonkin, Aragon Gray Pty Ltd

Text design by Cindy Tonkin, Aragon Gray Pty Ltd

Distributed in Australia by Aragon Gray Pty Ltd. For further information contact us on phone +61 412 135 426 or visit our web site www.consultantsconsultant.com.au

Offsites - the basics!

Offsites 101 tells you everything you need to know to succeed in your offsite and away days.

It's everything I can think of to make your offsites and away days easier and more effective.

If I'm missing anything, please just ask us a question, and I'll add it in!

Here is what we know you need to know.

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So why offsites?

More importantly why do you and your team (and your boss) need offsites?

Offsites are excellent tools. But just like you wouldn't use a spanner to hammer in a nail, you need to use tools for the right reasons.

When an offsite is the right tool

Here are some major reasons why your team might need offsites:

- ☐ The team is normally geographically or architecturally isolated and need to work together
- ☐ The team needs to get outside of their regular thought patterns and innovate
- ☐ Everyone is overwhelmed by business as usual
- ☐ Things have changed strategically
- ☐ You need a new strategy
- ☐ You need the team's buy-in on a strategy
- ☐ Operational focus has shifted
- ☐ Certain operational problems continue to surface
- ☐ People are not working well cross-functionally.

When an offsite is the wrong tool

And sometimes offsites are the wrong tool. Avoid offsites as pure love-fests. Don't use offsites to reprimand or make teams feel guilty. And offsites should never be used purely to give people information without a chance to interact and ask questions. See some of the **Benefits of Offsite Meetings** on page 6.

The reason why offsites work is that they give the opportunity to interact. Why offsites work is that people can work on the business not in the business for a little while. By pulling out of the day-to-day we can see what we need to do to make things easier. Just having a break from the workplace can spur productivity and innovation.

Why offsites don't work sometimes is they become an opportunity to just lecture. Sometimes they are just a junket. Sometimes offsites don't work because the wrong people are there. And sometimes everything seem fine on the day, but nothing changes. This is about taking action after the offsite.

Benefits of Offsite Meetings

Fix operational problems

There are many benefits of offsite meetings.

Here are a few of the more obvious ones.

Offsite meetings:

- ☐ Build team.
- ☐ Give you a chance to work **ON** the business, rather than just **IN** it.
- ☐ Make people work better cross-functionally.
- ☐ Solve operational problems.

Benefits of offsite meetings: Team building

Team-building is no mystery.

To build a team put them together and give them a task to do or a problem to solve. The best team-bonding events include a Significant Emotional Experience (SEE). This is why people who pull an all-nighter to get to a deadline feel a stronger bond with each other. War does it too.

Now you're probably not going to mount an armed assault to get your team to work together more effectively. But you can still call in a team-building expert who can help you solve problems at the offsite. And you can give your team a significant emotional experience at the same time. They'll bond **AND** they'll solve problems better together.

Benefits of offsite meetings: Work **ON** the business, not just **IN** it

The E-Myth brought our attention to the idea of working **ON** the business, not just **IN** it. An offsite gives both you and your team the ability to step out of the day-to-day routine of business as usual.

You may well be metaphorically cutting down lots of trees, and your tree-cutting skills could be world-class. But are you cutting down trees in the right forest? Offsites help you answer that question.

As a side-note, this is one excellent reason to have an external facilitator. If you are busy facilitating the offsite, then you can't participate IN the activities of the offsite. When you facilitate yourself you reduce your problem-solving capabilities instead of maximizing them. That negates the point of the offsite to begin with.

Benefits of offsite meetings: Solve an operational problem

A major benefit of an offsite is to leverage that capacity to step out of the work-place. So you can think and address questions outside of that 'business as usual' box. This means you discover exactly in which forest you should be cutting down trees. And whether you are in that forest.

Benefits of offsite meetings: Work better cross-functionally

Now you know which problems you are trying to solve. So you can bring in cross-functional expertise to help solve them.

You don't need a cast of thousands at your offsite meetings, as long as you have the right people there!

Solving Operational Problems

Solving operational problems is tricky. Running an offsite or away day is one way to solve them.

Bring the people together

Sometimes you can solve the problem just by putting all the concerned parties in the room together. It's certainly a good first step!

Make it cross-functional

So that means sometimes you need people across department boundaries. Sales and production. Marketing and data. Retail and Warehousing. To solve operational problems go cross-functional if you need to.

Pull the problem apart

Once everyone is in the room together you can pull the problem apart. This means you might

Define the problem: work out what your outcome is, what the current state is, and discover the gap between your outcomes and where you are. Then you can approach pragmatic ways to close the gap.

To do this you could:

- ☐ Map the process
- ☐ Create a matrix to plot the significant elements¹
- ☐ Draw a diagram of where things work (or not)

☐ ¹ This is where a good facilitator with business experience comes in. When you know what the gap is you can define the matrix! So for risk management a matrix graphing possibility of risk against impact would work. For one client in a highly politicised environment, we plotted proposed initiatives against "likelihood of getting positive press" and "will make the boss happy".

- ☐ Choose a metaphor and draw it out, then make it concrete
- ☐ Use open space technology to nut it out
- ☐ Brainstorm with post-it notes
- ☐ Examine how others have solved this issue - often from outside of your industry.
- ☐ Sit in small groups with a marker and butcher's paper and talk
- ☐ Turn journalist: interview each other (in a cross-functional workshop) to look for leads into solving the problem. This works particularly well with customer-supplier relationships

Devise a strategy

Whether you have two hours or two days, participants need an agreed strategy by the end of the day.

And from the agreed strategy comes a set of agreed actions.

Each action goes on a list, with an owner and a deadline.

For absolute best results the actions become part of your regular work-in-progress (WIP) meetings. Actions may not drop off the list without discussion.

The first offsite concludes with an action plan and an appointment to reconvene. Ninety days between offsites is a comfortable time. At 90 days we still remember what happened at the last offsite.

So book in your next offsite now!

Offsite Team Meeting Nightmares

Learn from other people's mistakes!

Offsite team meeting nightmares are easy to avoid, when you use the checklist on page 26. Here are some of the nightmares that can occur when you don't!

Bring your facilitator in early to help you plan properly. It will cost you no more, but it will make a successful offsite much more likely.

Offsite team meeting Nightmare 1: Wrong venue

If you get the choice of venue wrong, your offsite team meeting can easily turn into a nightmare situation.

One of the best examples of offsite nightmares is Alan's story about facilitating an offsite at an RSL Club.

The room included poker machines, which people began to use from about 11:30.

By midday, the calls for "Number 23, your chips are ready" began.

It's hilarious. If it's not your offsite!

Phil ran a great offsite meeting in a new local restaurant. He wasn't keen but the client was certain it would work. The room was next to the staff cloakroom. Waiters started arriving at work and chatting with each other. Then the chef rebuked his apprentice in the cloakroom: the whole room stopped to listen to the dressing-down, trying not to laugh. Phil tried not to explode. It didn't get any better through the day.

Maybe this wasn't the best venue.

One team meeting was held in a rehearsal space of a major theatre.

While the participants were busy discussing how to deal with the latest corporate changes, the make-up artist, hairdresser and actors in the green-room next door exchanged gossip on Charlie Sheen's drinking habits, quite loudly.

Sometimes, the wrong venue is purely in the wrong suburb. I once worked at a great, inspiring venue. Every room was decorated differently. One room had fake grass. Another had fountains between Plexiglas on all four walls. They also had a toy-room. But our participants were up to an hour late because it was out of the CBD in a cul-de-sac that taxis had difficulty finding.

For tips on choosing the right venue for your offsite, bring a facilitator in early, and follow the checklist on page 26.

Offsite team meeting Nightmare 2: Wrong facilitator

Sometimes, even if you get the right venue, you could have the wrong facilitator. Here are some failures which our clients have told us about.

One client engaged Greg, an industrial engineer, to help them solve some workflow problems at an offsite team meeting.

Unfortunately, Greg was used to advising, not facilitating.

Greg grilled participants until he found what he thought was the right solution for their problem. Then he sent everyone home. And Greg wrote it up. Predictably, no one but Greg had ownership of the solution. Whether his solution had merit no one could tell. No one bought into it.

The qualities of a great facilitator are on page 20.

Offsite team meeting Nightmare 3: Too much PowerPoint, not enough discussion

Death by PowerPoint.

If you have more than 10 minutes of one person talking, then there needs to be at least 20 minutes of so what discussions, questions and analyses of what they said (and didn't say).

There must always be time for questions.

If speakers are afraid of questions, then try parallel discussion, a pecha kucha or small group discussion. Offsite team meeting agenda template is on page 22.

Offsite team meeting Nightmare 4: Wrong food

Of all the complaints about events, food is number one.

You need to be prepared to supply an array of food. At last count, you need to take into account all these styles: Vegetarian, gluten-free, nut-free, low chemical diets.

Part of planning an offsite team meeting is uncovering the food allergies and intolerances of the group.

Plus you cannot scrimp on the food. One of my clients swears by sausage rolls for morning tea. She says it's the cheapest way to build team morale. Find out what your people love, and provide that.

Offsite team meeting Nightmare 5: Wrong topics

Of course, the most important thing is that the offsite team meeting be about the right topic.

Suz' clients had recently gone through a round of retrenchments.

At the offsite the only thing that participants were really interested in discussing was the impact of the retrenchments and project funding cuts. They were in survival mode, not planning mode.

At the other end of the scale, Brendan's chosen offsite venue included a free team-building cooking lesson. Brendan wanted to build team with this offsite, so it fitted.

Unfortunately, the cooking lesson divided the team into three groups, and put them in three separate rooms. Each sub team finished at a different time, and instead of being encouraged to support the other teams they all went off separately to make telephone calls, answer e-mails, etc.

You cannot build a team by separating them into separate parts.

Choosing the right topics is much easier when you have someone helping you plan, prioritize the critical issues, and solve them first.

You cannot solve every problem at a single offsite meeting.

But you can start with a challenge and build resilience in your team by allowing them fix the problem.

Get Cindy Tonkin to help you.

Effective Offsite Meetings - Dos and Don'ts!

Effective offsite meetings can be very useful. Ineffective ones are a waste of time and money.

Do it right the first time. Here are some dos and don'ts.

Do plan ahead

Make sure you plan ahead so that your team can all be there.

Plan ahead so you have time to consult your boss and make sure that you are working in line with their strategy and requirements. Most importantly, plan ahead so that you can include your facilitator in the plans of the day. It costs you no more and it gives you a lot more value for your money.

There's a checklist on page 26 to help you.

Don't think you can DIY

Don't think that you can do it yourself.

Effective offsite meetings do not just happen by accident.

Effective offsite meetings usually include an effective offsite facilitator, trained in getting groups of people to unpack and understand their problems and find solutions to them.

You need a facilitator who is trained to facilitate, who has an appropriate experience and background and who knows how to get a good brief from you.

One of the major advantages of using a trained facilitator is that you can then participate in the day yourself. This allows you to have an opinion, epiphanies, and generally a good time!

Do have a single, clear purpose

An effective offsite meeting is not just a catch up. If you won't have a catch up, have morning tea.

Effective offsite meetings have a single, clear purpose.

This could be to lay out your strategic plan. It could be to solve a workflow bottleneck problem. It might be cross-functional consultation to deal with an industry problem.

It must have a single, clear purpose so that you can concentrate all of your efforts on that purpose.

If you don't know where you're going every road will get you there (and so will no road). If you don't know what you want from an offsite then anything could be the right thing. When you know where you're going you get there faster.

When your offsite has a single, clear purpose, then you can enjoy the journey.

There is never just one problem, you must prioritize. An effective offsite can fix just one thing at a time. Don't just do talking heads.

Don't skimp on the catering

Catering is very important. People talk about the stale biscuits or the lack of real coffee for weeks. Don't skip on the catering, it can ruin everything.

Do get some swag

It is important to some people that they get the \$20 T-shirt or the three dollar pencil sharpener with logo. Put in a small amount of budget for some swag and watch your team's eyes shine. Consider stationery, stickers, pens, shirts, paper clips, fuzzy felt, plastic dinosaurs or Star Wars figurines. It's not about the object itself, it's about the link between that and the offsite purpose. People love free things.

Do shine the spotlight on your team's experts

Do roll in the experts from your team and from your suppliers and customers.

If they are boring consider using video so the team can watch it before the offsite and then do a Q&A with the expert at the offsite.

Get the expert to present at a morning tea the week before and then Q&A at the offsite. Just avoid death by PowerPoint. You could even consider using Pecha Kucha like [Ignite Sydney](#)²; no presentation can exceed 20 slides, each slide is advanced after 15 seconds. Everyone's presentation is therefore no longer than 5 minutes. You can add in time for questions. [Follow this link](#)³ to see me doing an Ignite talk in Sydney.

It's a challenge to use this format, but if your experts are true experts then they should be able to rise to it. It will get them out of their "let's present what we presented at ExCo" habits and force them to think about what is really important.

Don't leave too many people out, but leave out the people who aren't relevant

The most effective offsite meetings have the right people.

Many teams have an inclusion issue. They feel that everyone should be included and so more than 80% of the people in the offsite do not need to be there. Don't leave out your vital supplier or customer. But leave out the HR team or finance guy who just might come along for curiosity's sake.

Do involve your facilitator early

I cannot stress enough how important it is to bring your facilitator in early. Let them do the hard work of deciding what's on the agenda and you can be the editor. It won't cost you any more and it will save you so much valuable time and effort. It will also make the day run very smoothly when you can just sit back and be a part of the ideas team.

² [Ignitesydney.com.au / https://www.youtube.com/watch?v=E64gxVhDUQI](https://www.youtube.com/watch?v=E64gxVhDUQI)

³ [Cindytonkin.com](#)

Measure Successful Offsites

Set yourself up for success!

Measure Successful offsites with these criteria.

- ☐ the "happy sheet" feedback
- ☐ change in the workplace
- ☐ how keen people are to do it again
- ☐ what you can take back to your boss
- ☐ the outcomes you set in the first place

Measure successful offsites by the happy sheets

Happy sheets are the written feedback given in the room.

Often a happy sheet is a series of questions rated 1 to 5 like:

- ☐ Were you engaged?
- ☐ How was the afternoon tea?
- ☐ How is the accommodation?
- ☐ Did you learn something?

While these are an indication of how people felt at the time, it really only measures how people feel about the last hour or two before they fill in the form. It doesn't measure how effective the offsite was. The best way of measuring the offsite is against your outcomes.

Happy sheets give you a read, but look for patterns in them, don't take them as gospel.

Measure by the outcomes you set in the first place

A better way to measure offsite success is to measure the outcomes you wanted before the conference and then after.

For example, before and after the offsite:

- ☐ how customers rate you
- ☐ number of calls returned
- ☐ how many meetings people go to, and how long they last
- ☐ how many errors your team makes
- ☐ how quickly errors are caught, fixed or reported

- ☐ how long it takes to turn around a piece of work
- ☐ how much skills coverage do you have

Set this outcome before the offsite. Then measure offsite success against this outcome. Get your facilitator involved early. They can help you create a clear and certain outcome you can measure.

Measure successful offsites by the change in the workplace

Part of setting your outcome will include some intangibles. How do you know the offsite has been a success? What will people do or say when they are back if it's successful? What behaviours will you see if it isn't?

For example here are some intangible wishes that came true for some of my clients:

- ☐ your 2IC gets the recognition she deserves from your boss.
- ☐ team members take content from the offsite and print it out to hang by their desk (or make it their screen saver).
- ☐ the "old boys" of the team voluntarily take the "new boys" out to lunch
- ☐ the words from the offsite are actually picked up in team meetings and used again and again.

Measuring your offsite success by behaviours means you notice what works - and that always feel good!

Measure by how happy they are to do it again

You can also measure how successful your offsite is by how keen people are to do it again.

The happy sheets might say that people were happy, but are they keen to do it again?

Does the sugar hit of the offsite lasts long enough for them to feel the offsite was a useful way to spend their time?

Measure by what you can take to your boss

All the change in the world is worth nothing if your boss is on your back.

Your offsite needs to have something shiny to take back to your boss.

Make sure that you know what that is. And keep your facilitator on the lookout for other shiny objects that may be valuable.

A Great Offsite Facilitator

When you are looking for a great facilitator, here are some things you may want to take into account.

Should your facilitator have experience in your industry?

There is some debate about whether you need a facilitator who has worked in your industry.

Certainly your facilitator needs to understand your business and your business outcomes. You can do that in a briefing.

Sometimes an out-of-the-box choice of a facilitator outside your industry means they will ask naive questions which your team may never have asked themselves.

There is also the possibility that their work in a different industry will bring new ideas and enrich your business.

Facilitators who have worked in your industry before will be more informed, but they will keep you in that industry mode.

It's your call. Both will work.

What methodologies used by a great offsite facilitator

A great offsite facilitator:

- ☐ gets a clear outcome and brief from the client then runs the offsite interactively and iteratively
- ☐ analyses your needs to ensure they can relate issues to your workplace
- ☐ understands the difficult and easy personalities in the team
- ☐ knows what issues are happening behind the scenes
- ☐ deviates from the offsite script to get to the outcome when necessary
- ☐ understands trends in training, facilitation and organisational development
- ☐ comes prepared for a few different scenarios.

The personal qualities and style of a great offsite facilitator

- ☐ energetic and enthusiastic when required
- ☐ able to stop and listen when necessary
- ☐ bring stories and the ability to improvise when needed
- ☐ uses a variety of techniques from many disciplines including training, negotiation, business coaching, facilitation, theatre, art-making, comedy, whatever else they have done in their life
- ☐ a broader experience than just facilitation.

The background and experience of a great offsite facilitator

- ☐ knows enough about your operational issues to link anything done at the offsite classroom to the real world of ops
- ☐ has the experience to control the room when things get hairy, when they get boring, and when business as usual goes on
- ☐ experience in finding solutions to operational problems in a number of contexts
- ☐ fits culturally with your organization and team

Offsite Agenda Templates

Design your agenda for success

Here's an offsite agenda template.

Clearly the agenda will flex around what you need to accomplish. Be aware that it cannot be all of one thing nor all of another.

Variety, team-building and problem-solving should be inherent in any offsite plan.

Half-day offsite agenda template

First hour

- ☐ Set outcomes for the day, give corporate context
- ☐ Presentations no longer than 20 minutes
- ☐ Minimum 10 minutes questions, so what and Q&A after each presentation

Second and third hours

- ☐ Dissect the problems to be solved
- ☐ Allocate problems to cross-functional groups
- ☐ If possible make the problem-solving also a game with elements of both competition and collaboration.

Fourth hour

- ☐ Bring threads together from separate groups
- ☐ Action plan and wrap up.

Full-day offsite agenda template

First hour

- ☐ Set outcomes for the day, give corporate context
- ☐ Presentations no longer than 20 minutes
- ☐ Minimum 10 minutes questions, so what and Q&A after each presentation

Second and third hours

- ☐ Dissect the problems to be solved
- ☐ Allocate problems to cross-functional groups
- ☐ If possible make the problem-solving also a game with elements of both competition and collaboration.

Fourth to sixth hours

- ☐ Introduce a diagnostic tool, analytical model, data-set or similar stimulus
- ☐ In cross-functional groups analyse, apply to work

Seventh hour

- ☐ Bring threads together from separate groups
- ☐ Action plan
- ☐ Seek feedback
- ☐ Wrap up.

Two-day offsite agenda template

A two day offside meeting gives you the chance to unpack and re-construct much more.

Typically, you need a two day offsite when you are creating a new strategy or re-aligning a team. It is better have 4 x half day offsites per year then one two-day offsite. It gives greater value to chunk smaller. If you can have both, then do that!

Day one: pull the problem apart

First hour

- Set outcomes for the day
- Give corporate context
- Presentations no longer than 20 minutes
- Minimum 10 minutes questions and answers per presentation.

Second and third hours

- Dissect problems to be solved
- Allocate problems to cross-functional groups
- If possible make the problem-solving also a game with elements of both competition and collaboration.

Fourth to sixth hours

- Introduce a diagnostic tool, analytical model, data set or similar stimulus
- Analyse in cross functional groups analyse
- Apply to work

Seventh hour

- Bring threads together from separate groups.
- Action plan and foreshadow day two.

Day two: put the solution together

First hour

- Review Day one.
- Outline any overnight insights.
- Seek further feedback

Second to sixth hour

- As for day one, iteratively introducing more topics, data or models.

Seventh hour

- Bring threads together from separate groups. Action plan, Seek feedback, Wrap up.

If you want help designing an offsite please talk to Cindy Tonkin. The chances of success are much higher when you introduce your facilitator 6 to 8 weeks before the offsite. It costs the same whichever way you bring them in. Stop keeping a dog and barking yourself!

Plan an Offsite Meeting: The Checklist

Plan an offsite meeting with care. Offsites are excellent ways to solve operational problems, build teams and get your team on the same page. Do it right and it's great!

If not, a nightmare ensues.

This checklist will help guide you through effective ways to plan an offsite meeting.

Plan an offsite meeting: Get clear and specific outcomes

Get clear and specific outcomes for your offsite.

- ☐ What do you want to achieve at this offsite?

- ☐ How will you measure the success of this offsite?

- ☐ What will be on the agenda?

- ☐ Given your outcome, who needs to give a talk or a presentation?

- ☐ Who needs to ask questions and be more informed?

Plan an offsite meeting: Get the right people on the bus

Now, to plan an offsite meeting well, get the right people on the bus.

- ☐ Engage a great facilitator
- ☐ Choose a day that you and all of your management team can be there
- ☐ Decide how far down the levels of team management you want to go
- ☐ Choose any guests you need: consider HR, Finance, Clients, Suppliers, teams that your team interacts with.
- ☐ Do you want your boss, or other senior management team there?
- ☐ Reserve the date well in advance in everybody's diaries

Plan an offsite meeting: Get the budget right

Get the budget right for your offsite meeting. This includes the venue, catering, equipment, swag, handouts.

- ☐ How much budget do you have for the venue?

- ☐ What catering is available, what can you buy in? What will it cost?

- ☐ What other equipment, t-shirts, handouts, books, etc. will you need to buy? What will it cost?

Plan an offsite meeting: Get the venue organised

Now you need to make a few decisions about the venue.

- ☐ How many seats will you need?



- ☐ Inspect the venue ahead of time
- ☐ If it's in-house, check if the room will be big enough, and that there are break-out areas close to the main room. For best results, let the facilitator see the room too!
- ☐ Check with the facilitator for the best room set-up: generally a board-room table is the worst set up for an offsite
- ☐ Organise for delivery of any equipment or swag

Plan an offsite meeting: Prepare participants

Let the participants in on it early!

- ☐ Send participants teasers about what surprises the day has in store
- ☐ Request whatever pre-work will make the day go more smoothly
- ☐ Survey participants to make sure you have the food, sizing or any other personalised information right

On the day: Sit back and participate

If you have chosen the right facilitator, created clear outcomes and selected the right venue, just sit back and participate.

Afterwards: Tidy up the loose ends

At the end of the day, tie up any loose ends:

- ☐ return any equipment you borrowed, and make the room look like it did when you walked in (particularly if it's in-house)
- ☐ dispose of any leftover food (particularly if it's in-house)

Make sure you

- ☐ make a dairy note for the next offsite date - your facilitator will remind you ahead of time if they know the date

The facilitator should give you

- ☐ photos of the day's output
- ☐ write up of the actions



Cindy Tonkin runs offsites professionally.

She has qualifications in Linguistics, in Neuro-Linguistic Programming and in Improvisation, all of which assist her to make your offsite or away day a success.

Find more at consultantsconsultant.com.au

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