



Center for  
Applied  
Research

Philadelphia, PA  
215.320.3200 tel  
215.320.3204 fax

Cambridge, MA  
617.576.1166 tel  
617.576.3015 fax

info@cfar.com

## ***Briefing Notes:*** **Executive Retreats**

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### **Introduction**

As the rate of change and novelty in the wider business environment increases, many organizations have come to appreciate the need to create protected settings within which their top managers can come together to assess their situation—to reflect on the past, to take stock of emergent trends, to question the adequacy of their strategy and structure in the face of new challenges, and most importantly, to learn from their experience.

Such events must be carefully designed and linked to the particular organization and people. Through our experience in consulting, we have designed and monitored many such processes. We have come to see certain principles that may aid others in developing a retreat for their organization that will deliver on the hopes and the objectives of participants.

### **Key Principles**

1. Protected opportunities for reflection and learning are increasingly essential to maintain the adaptiveness of organizations. Creating these occasions is more important than getting every detail of the process right. Commit to conducting them on a periodic basis and learning from each iteration so that they improve over time.
2. The sanction and leadership of the process must come from the top. Organizations sometimes make the mistake of over-delegating this responsibility to a staff executive or to an outside consultant. Both can be resources but not to the exclusion of the line leadership of the enterprise. Some organizations rotate the responsibility from session to session, as if it were a chore. This interferes with the learning from one session to the next and with the linking of the work and thinking during the retreat to the ongoing management of the organization.
3. The agendas must be authentically linked to the challenges facing the organization. A common error is for such events to take their focus from fads sweeping an industry—quality in manufacturing systems, marketing in health care, a customer focus in service industries. Participants easily feel the difference between a session that is coupled to their

organization versus one that is simply borrowing from the wider field. These issues may be central, but the key is to link them with the firm's real situation.

4. If there have been previous unsuccessful annual retreats, or if the formal parts of the retreat are devalued and the informal regarded as containing the benefits, then the new event should explicitly break with the past format. If the past events have featured mostly outside speakers, the new session should include predominantly insiders. If there has traditionally been no participant preparation, then the new event should have some engaging preparatory tasks. The initial challenge must be to revitalize the meetings so that people adopt a new attitude towards them.
5. The session must be a balance between *protection* from the rhythms (often crisis-driven) and patterns (often fragmented) of daily work and a *coupling* of the session and work environments. This balance often involves thinking carefully about both preparation and follow-up in order to link the event to the real work. A useful guideline for advance work is that it should be valuable (and engaging) even if the event were cancelled. Often preparatory work can only be introduced once the retreat process has gained credibility. The worst case is to have half-hearted advance work with no sanctions for those that do not prepare. Interviews can be a useful beginning, as they start people thinking yet put staff in the active role of eliciting the patterns in the responses.
6. Follow-up is essential. Much of the value of such retreats is simply in the revitalized working relationships, the different models in the mind of each participant about critical issues facing the firm. However, these benefits will fade quickly unless helped to grow and develop by some follow through on issues that have implications for the enterprise. Many events that are initially viewed favorably become reappreciated cynically because people do not see the guiding values and ideas actually applied in the real organization.
7. Balance using natural and cross-cutting work groups. Often at retreats people have an opportunity to interact with people they do not normally work with. These processes encourage divergent, creative thinking and impart a richer appreciation of the entire enterprise to each participant. However, upon return, participants do have to follow through on ideas within the previously established working structures. A useful dynamic is to begin with cross-cutting configurations of participants and, as the session gets close to the ending and next steps discussions, to shift towards natural work groups.
8. Assess the success of the retreat. Because the retreat itself is designed to be a space in which participants can reflect and learn about their ongoing organization, it can most powerfully model the commitment to learning and development by inviting structured feedback on itself. This feedback can, in turn, be used to improve future events.

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