

3 Keys to a Successful Strategy Off-Site Meeting

By Rich Horwath



It's ironic that business strategy is designed to clarify a group's direction, but the meetings to discuss it can often be muddled, disjointed, and result in greater confusion. One study showed that 80 percent of senior executives' meeting time is spent on issues that account for less than 20 percent of the company's long-term value. Another survey

showed that 88 percent of executives believed that their leadership team meetings did not produce decisions on important strategic issues. This doesn't have to be the case. In my experience facilitating strategy sessions with hundreds of executive leadership teams, I've developed principles and techniques that I'll share with you to ensure

your strategy sessions are as effective and efficient as possible.

First, consider your most recent strategy session and answer these five sample questions from the Strategy Facilitation Assessment to see how your team is currently doing:

1. The facilitator of the meeting is not the leader in the meeting because these are two different and conflicting roles.
True False
2. The facilitator does not have a stake in the decisions being made in the meeting.
True False
3. The meeting's desired outcomes have been identified prior to the session in the agenda.
True False
4. Past strategy sessions have been an effective and efficient use of people's time.
True False
5. The meeting has been organized around topics and questions for conversation, not a series of presentations.
True False

[Take the full 20-question quiz at StrategySkills.com to see how your team rates]

How many "False" answers did you have? Three or more would indicate there's a great opportunity to raise the bar of your strategy sessions. The Facilitation Framework gives you a concrete way to improve your teams sessions and it involves three P's:

Purpose, People and Process.

Purpose

One of the first things to consider is the purpose for the session, and here I'm not just referring to the generic agenda. What is the desired outcome of the session? There's a big difference between an

agenda that lists topics to be discussed and one that includes the desired outcome for the session. Is the desired outcome a new strategic framework, identification of the company's core competencies, or creation of competitive strategies to neutralize a new player in the market?

When designed strategically, executive leadership team sessions can also serve the following purposes: opportunity to build relationships, stimulate people to think differently, create a shared understanding of the business, develop greater commitment to priorities, and get on the proverbial "same page." Start by ditching the traditional format of the agenda, the one with time slots on the left and topics on the right. Placing time frames on each topic (9:00 a.m. – 9:15 a.m. Develop Mission; 9:15 a.m. – 9:45 a.m. Develop Vision; 9:45 a.m. – 10:30 a.m. Save the Planet) is a sure way to limit people's thinking and conversation. A good facilitator will have the approximate time frames estimated on her facilitator's guide, but they aren't shared with the group. Why? Because if it's 9:43 a.m., people mentally check out of the current topic and move on to "Save the Planet" which starts at 9:45 a.m., even though they may just be uncovering an important new insight.

Replace the traditional agenda format with the following items: Desired outcome for the overall session, total time frame (e.g., 8:00 a.m. – 4:00 p.m.), topics, desired outcome for each topic, and person responsible for leading the conversation. Be prepared for pushback from someone wanting more specific time frames attached to each topic. This is typically the multitasker looking to plan their duck-out time—don't give it to them.

As you design the agenda, keep in mind that studies show the most important meeting items do not necessarily receive the greatest amount of time and attention. Be sure to place the most important topics of the conversation at the beginning of the session, as they tend to receive a disproportionate amount of time and attention. Before you move from one topic to the next, take the important step

of jotting down the outcome for that topic and next steps.

Another key aspect of purpose is to discern what relevant information should be shared before the session, and what should be discussed during the session. Research shows that 40 percent of meeting time is spent sharing information that could be delivered before the meeting. To add insult to injury, 65 percent of meetings were intentionally set up to be status updates or information sharing. It's shocking to see how much of an executive team's time is completely wasted by having eight people sit around a conference room table for a half-hour listening to someone else's update. If it's an update, send it out prior to the session for people to review and then facilitate questions and comments on the update during the session.

Finally, if you are tasked with facilitating the whole session, or one of the agenda topic items, be sure to understand the context of the topic(s). One thing that trips up many well-intentioned sessions related to the topic is the type of thinking required to move the conversation forward. Divergent thinking is the exploratory task of generating new options, withholding judgment, and gathering a wide range of views. Convergent thinking serves to evaluate options, summarize the conversation, and draw to a conclusion. Be sure to understand where you are with regards to the topic and then use questions and exercises that support either divergent or convergent thinking. Too often, a conversation just gets started in divergent mode and someone moves to convergent thinking and it cuts off the flow of new ideas before a full range have been explored. A good facilitator understands when to use convergent and divergent thinking along with the questions and exercises for each.

People

In considering the people, think about both the facilitator and attendees. The facilitator's role is to lead the group through a series of conversations to reach the desired outcome. In doing so, the

facilitator needs to possess both business acumen and emotional intelligence. Emotional intelligence can be overlooked, but a person's ability to read the room, listen actively, ask provocative questions and then modify their approach accordingly, is critical.

Here are some guidelines for consideration when choosing a facilitator:

- Not the leader in the meeting. The facilitator's role and the leader's role are different and need to be kept separate. A leader attempting to facilitate the strategy session risks steering the conversation to their point-of-view and will limit the input of the team, especially those not willing to provide ideas that oppose those of the boss.
- Does not have a vested interest in the meeting topics. There's nothing more frustrating for a team of executives than being in a strategy session with a facilitator that is continually promoting their position at the expense of others. The facilitator must inherently be neutral on the topics to be effective.
- Does not have a stake in the decisions being made. A facilitator can't lead a strategy conversation around the reallocation of resources if their resources are on the table as well.
- No internal political affiliations that will influence the outcome of the conversation. This is relevant both during the meeting and afterwards. Company cultures that allow back channel conversations after the meeting do themselves no favors as these one-to-ones leave other people with less information and open leaders up to claims of favoritism.
- Expert in the process of strategic thinking. Unfortunately, in some organizations, the use of exercises in strategy sessions is eerily similar to the game of Pick-up-Sticks. A series of random, unrelated strategic thinking tools are tossed onto the flip chart with no rationale as to their actual practical application or sequencing. "Hey, let's do a SWOT Analysis, then a Gap Analysis, and wrap up with a Five Forces of Competition

Model." People leave the session with a frustrated, unfulfilled sense of having done some thinking, but in a very unproductive way. An expert strategist understands which of the 120 strategic thinking tools is appropriate for their specific situation, and just as important, which tools would be a waste of time.

A facilitator can come from within the organization or outside the organization as long as they meet the criteria outlined. When you add up the salaries in the room for a two-day offsite strategy session, and think about how the executive team's entire approach toward the business can be strengthened or deflated, you can see why the selection of a facilitator is such an important factor.

The other aspect of people to think through are the attendees. Let's start with the numbers. Research shows that 20 percent of meeting attendees should not be there in the first place. If a person is not going to actively contribute insights during a session, they should not be there. Anyone in the room who is not a knowledgeable, active contributor is going to slow the session down. Then there is the 8-18 rule which states 8 or fewer people is ideal for decision making, and 18 people or less is best for divergent thinking (e.g., idea generation).

Adding a bit of discipline to take a close, hard look at who should really be attending the session can dramatically improve your results. The customary approach for a strategy session is to automatically include all the executives on the team. This is fine unless of course you have a Tactical Terry in your group. You know Tactical Terry—the first one to jump down a rabbit hole and take the conversation with them.

Nothing kills an executive team session faster than one person who simply cannot keep the conversation elevated at the strategic level and dives down deep into the tactical weeds of the business. The easy way out is to keep inviting Terry to these sessions and live with the notion, "Well, that's just Terry being Terry." The bolder and

better options are to either provide strategic coaching to Terry or uninvite Terry to the meeting. Some may dismiss this latter option immediately, but nothing creates the sense of urgency on Terry's part to elevate thinking and conversation as quickly as the "uninvitation."

Process

Once you've determined the purpose of the session, and the people attending, it's time to outline the process. As mentioned earlier, a good strategy facilitator will be able to select which of the 120 strategy exercises are most relevant to achieving the desired outcome. Innovative thinking exercises can be an excellent way of starting the session. These exercises help executives think differently about the business to discover ideas that may lie in other domains, combine elements in new ways, and break the normal way of doing things. When we view innovation as "creating new value for customers," a floodgate of insights can be opened with the right question or exercise.

Typically in executive leadership sessions, decisions should be made. It's helpful to understand at the outset who has the ultimate decision rights for each decision to be made. While this sounds obvious, it's not often clear even at the executive level who is actually responsible for certain decisions. Once the decision rights have been determined, steps include identifying the decision at hand, establishing criteria for the solution, exploring options, weighing the risks and benefits of each option and soliciting input from the group.

The other aspect of process that often gets overlooked is the selection of an activity to reach the desired outcome for a particular topic. It's not enough to simply put a topic on the agenda and then hope the conversation leads down a path that appropriately addresses the issue. For each topic, a specific activity should be identified to get to that outcome. As an example, your strategy session topic may be succession planning. The desired outcome is to identify the #2 person behind each functional area vice president. The activity to reach that

desired outcome is to work through the 9-Box Talent Model as a team.

There are a host of other facilitation process techniques including a variety of voting methods, prioritization tables, and decision-making frameworks. If you've chosen wisely, your facilitator will have these items at his or her disposal and prescribe the appropriate one to reach the desired outcome. At the conclusion of the session, be sure to create a brief action plan encompassing the what, who, when to ensure accountability for next steps.

When making a six- or seven-figure investment in a new product or piece of capital equipment,

great care is taken to ensure the money is spent wisely. The same cannot be said for many executive leadership team meetings, even though there's a similar level of investment when adding up people's time and salaries over the course of a year. Too often, these sessions are either the same old, same old, or a haphazard mishmash of unrelated agenda items unattached to a real purpose. If you apply the Facilitation Framework and practice the three P's of purpose, people and process, you'll see a dramatic improvement in the way your team talks about the business. If not, you can always break out a game of Pick-Up Sticks.



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