

## Why Offsites Don't Work and What To Do About It

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Is your office or team planning an offsite—also called a “retreat”—in the near future? If so, staff are probably experiencing a mix of emotions ranging from upbeat anticipation to absolute dread. They may have ideas about workplace improvements they would like to see, but they also may have experienced offsites in the past that went nowhere. Once everyone returned to the office, it was business as usual and nothing changed. They might wonder: What will be different this time?

If this sounds familiar, you are not alone. Why do these events so often fail to meet expectations? In our experience, we've seen several problems with and misconceptions about offsites that work against successful outcomes.

To begin, the office staff may lack the commitment to follow through with offsite actions and decisions.

In some cases, offsites can be effective as one-off, self-contained events with no need for follow-up. However, if the offsite is responding to a need for better planning or improved performance, making changes stick will require dedicated resources over a sustained period. When managers and participants fail to put the offsite in the context of a larger change initiative—and fail to set aside the

needed time or resources to implement action items—people return to the daily grind of work as momentum generated at the offsite quickly dies.

Some managers may designate a steering committee or other individuals to plan and design the offsite, but in doing so, they sacrifice an important leadership role. The manager, having assigned others to develop the agenda, may participate as part of the group but never takes the lead to guide the way forward. In other cases, group leaders may recognize office problems but erroneously believe that just getting everyone together in a room to talk will magically resolve everything. Recognition of a problem alone does not translate into change. In still other circumstances, participants may raise issues and even propose solutions, but the manager may not know how to deal with the messy task of leading them to a desirable conclusion.

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## Recognition of a problem alone does not translate into change.

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Other offsites suffer from facilitators who go overboard on “team-building” activities such as drawing your favorite animal or tag-team egg rolling. These events may be fun (or painfully laborious, depending on your point of view), but lessons from these types of offsites—if any—rarely transfer to lasting behavior change in the office environment. If the goal is simply to build camaraderie, consider an after-hours party with staff’s families invited.



Offsites also may suffer from:

- Unclear purposes (“Who said anything about team building? I thought we were going to design a new strategy.”);
- Unrealistic expectations (“I know we haven’t been able to agree on a new strategy over the last 12 months, but we ought to be able to get it done by the end of this two-day offsite”); or
- Too many objectives or too little time, given complexity of the tasks (“We’ve already spent an hour on this, let’s move on and talk about the new strategy. By the way, can everyone stay until 7:00?”).

Participants also may be expecting the offsite to completely resolve ongoing management and organizational issues. That’s unrealistic, since people need time to modify their existing behaviors or try on and practice new approaches.

## Making Your Offsite Effective

Regardless of the challenges, offsites can be powerful, transformative events that improve teamwork and achieve results. Here are some guidelines that may be helpful to make your offsite effective and productive.

### Resolve to follow through on offsite actions.

This is easier said than done. As a team lead or manager, what are you willing to do, and to ask your staff to do, after the retreat? Aim to come away with a small number of concrete and achievable actions to help ensure success. Start with an easy goal to get a quick win and build momentum. Expect some backsliding as a natural part of the process, but use individual or group check-ins to keep working toward solutions. Recognize

that follow-up actions may entail an investment of resources. And if you aren't sure you have the managerial know-how to handle the issues, which can be complex, elicit the help of a management coach or a mentor after the retreat. Someone in this role can help you think through concerns, develop appropriate leadership and management skills, and keep you focused and on track.

### Group leaders must take ownership of the agenda, starting with what they want to accomplish during the offsite.

This entails identifying concrete, realistic objectives by considering what the team can reasonably accomplish in the designated timeframe. Allocate sufficient time to deal with sensitive issues. Team members have busy schedules and may want to

take shortcuts to get things done quickly—but remember that group processes take time. A good facilitator can help develop and organize an appropriate agenda.

### Managers should expect to take a lead role in the offsite.

Using a professional facilitator can help ensure that team members actively participate and that the group stays on task, but a facilitator is not the same thing as the team leader. That role can only be filled by the head of the group. Think through

retreat outcomes and the respective responsibilities of leadership beforehand. Where do you expect the group to end up under each objective—that is, what would success look like? In which areas should managers intervene to help direct

the group? And when do you need to be ready to respond to team members to address their

concerns, acknowledge uncertainties, provide encouragement, and appreciate contributions?

## Ask potential facilitators how they've conducted offsites in the past.

Look for someone who does not shy away from contentious issues and addresses the tough issues head-on. For example, how has the facilitator handled group conflicts in previous offsites? A skilled facilitator should bring experience in establishing

an environment of trust and designing processes that empower the group to identify and solve problems. Other key facilitator skills include using brainstorming methods, helping participants prioritize, and building group consensus.

## Consider blending skills development and targeted training into the offsite.

If you're kicking off a new strategic planning effort, start the retreat by training everyone in the strategic planning methodology and process. Does the team have a history of dealing with conflicts? Hold

a session to develop conflict resolution and conflict management skills. If you want to introduce new management skills, start with a short interactive training session. Then dive into the actual issues.

## Enjoy the journey, but stay focused on the issues.

Offsites should have a relaxing atmosphere conducive to learning with opportunities for personal revelation and relationship building, but participants need to stay focused on furthering the group's goals and increasing team performance. Team-building

activities, for example, can be effective when they deal with real issues and are applicable to actual work situations. With that in mind, ask your facilitator how proposed activities will contribute to the outcome(s).

Regardless of the objectives of the offsite, team building should always be considered an underlying purpose of the group interaction.

As team members plan, problem solve, reach decisions, and share personal and professional insights, the team should always move toward becoming more cohesive and effective. Even conflict can be a productive growth experience when the group

debates ideas and comes to resolution. Skilled facilitators will know how to lead your group to pause and reflect after formative sessions to reinforce participants' observations and new learning.

## Plan the offsite well in advance.

To ensure that all team members can participate, give ample notice so that invited participants can put the event on their calendars.

## Consider scheduling a series of offsite events over the year.

A series of offsites can be useful if you have not had a retreat event recently, or if there are many issues to tackle. This approach also can help ease scheduling demands by allowing for several shorter events, alleviate pressure to deal with all of the concerns at once, and permit interim periods when staff might be able to make progress on issues and build momentum before reconvening. Offsites also might have varying agendas, enabling you to

devote one retreat to planning, one to management issues, and so on.

In summary, offsites can be worthwhile and productive events. To ensure success, managers should stay fully engaged throughout the process, establish clear expectations about offsite outcomes, and ensure that staff are willing and able to implement follow-up actions.

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# MAKING YOUR OFFSITE EFFECTIVE

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**1 FOLLOW THROUGH** ON OFFSITE ACTIONS 

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**2 LEADERS MUST  
—TAKE OWNERSHIP—**  
OF THE AGENDA

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**3**  MANAGERS SHOULD TAKE A  
**LEAD ROLE** IN THE OFFSITE

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**4 ASK** POTENTIAL  
FACILITATORS **HOW**  
THEY'VE CONDUCTED OFFSITES

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BLEND IN **SKILLS DEVELOPMENT**  
**5 TARGETED TRAINING** 

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**6 ENJOY THE JOURNEY,**  
BUT STAY *FOCUSED* ON THE **[ISSUES]**

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**7 TEAM BUILDING** IS A PURPOSE

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**8 PLAN** THE OFFSITE  
**WELL IN ADVANCE**

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**9 SCHEDULE A SERIES OF  
OFFSITE EVENTS OVER THE YEAR**

