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Charge To Your Retreat!

Sounds like a contradictory statement, I bet. It really isn't because we're not talking about the retreat where you duck and run the other way because your opponent is winning the battle. In conventional retreat the objective is to remove yourself from the conflict with an opponent and live to fight another day. Or maybe just to live. Most of the time, I don't have a problem with retreating. Unless the battle is the deciding battle of the war, recognizing that you could be at a strategic disadvantage that makes it impossible for you to win may make retreat a very smart move. Ok, all of this doesn't matter because it isn't this use of the word 'retreat' that I am talking about.

I am speaking of the meaning of the word retreat that relates to an event where a business' key players get away from it all and meet to discuss the business from a broad visionary and strategic perspective. When I speak of working **ON** your business instead of working **IN** your business, a **retreat is probably the ultimate ON activity**. For that reason, I think a retreat is an essential tool for business growth and health. If you think about painting a picture or building a deck or climbing a mountain, at various times during these activities, you probably find yourself stepping back (OK maybe not literally stepping back if you're climbing a mountain) and seeing if what you are doing makes sense. Does the overall progress seem to be going in the right direction? Have I/we the resources to finish the job? What should the business look like when I am done? Is the destination still valid, or should it change? A retreat is an opportunity to validate or update your vision for your business, the strategic steps to be taken to achieve that vision and addressing all of the important issues that we don't seem to take time to deal with during our normal business operations.

So what should the retreat look like? **First, it should be away from the office/business**. You should only allow emergency communications through during the retreat. Define "emergency" clearly and stick to your word. **It can last more than a day but a day should be enough for most small and medium-sized businesses**. I think a retreat should be independently moderated by someone with experience in either your industry (a consultant) or with experience in moderating retreats (like ME for example - I absolutely LOVE to do this kind of work). The purpose of the moderator is not to solve problems but to keep the retreat moving at an appropriate pace so that all of the key issues are addressed in the time provided, and to promote discussion and collaboration amongst the participants so that the best ideas, plans and decisions are made. So let's talk about the agenda of this meeting. The following represents some but not all of the subjects that could be discussed at the retreat. Depending on your business, there could be pertinent issues related to such things as regulation, family ownership/management issues, crisis management and otherwise that may be important to include. In any event here are some basics that should be a part of your retreat:

3 or 5 year Vision - You need to review this at least yearly to be certain that your desired future for the business is still desired and still valid.

Roles of the key players - In an open and honest atmosphere, each key member of management should self-assess their daily, weekly and monthly activities, subject to questions and challenges from others present. Are those things they do representing the best use of their time? This can be a tough part of the retreat, but is absolutely essential to address. In small and medium-sized businesses, inefficient time use is a profit and growth killer. All key players must be maximizing their effectiveness by doing that which they are best suited to do and allowed enough time to do it.

Evaluate the customer/client experience - Is the business serving its customers better or worse than last year? If you solicit customer feedback, and you should, you may want to time that survey or other method so that the results are fresh when the retreat occurs. Expect to have some action plans coming out of this portion of the retreat to address the weaknesses identified.

Evaluate your product/service offerings - Is the mix appropriate? Are there products/services that should be added or removed? Should some research be conducted to determine this? Collaboration in this area means stagnation does not occur. Expect that what you sell today may not be as valid next year. In some industries, this is what differentiates you from your competitors. This is where you should be discussing the competition to assure that what you think makes you better remains valid. This is also where you should discuss your industry, looking at trends, potential opportunities and threats.

Establish the yearly goals of the key players - A retreat is the perfect time to set each person's personal goals as it relates to the business. You must determine if these goals align with the overall goals of the business. If not, you have to insist that the goals are consistent with organizational goals. It of course makes sense that you set these goals after reviewing each person's goals from the previous year and their success in achieving them. The goals should be challenging but achievable.

A retreat is only valuable if each person attending is empowered to be open and honest about their view of things. Negativity does have a place, but a limited one. Retreats are about solutions to problems, not just identifying them. Insist that all problems or issues identified have at least some action plan to address them. Retreats are hard work. **The Kumbaya moment comes at the end when you realize that a lot got addressed, a lot got decided.** A retreat is not the only place to make these decisions and plans, but having one each year assures that no problem should be enduring. Mostly, a retreat is valuable process to ensure the business is always moving forward.

See you next time.



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