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Certified Public Accountants/Business Consultants

Management Retreats: Tune-up for Maximum Performance

Management retreats are an excellent vehicle for fine-tuning your team for maximum performance. The key to a successful retreat is knowing what you want to accomplish and planning activities around your goals. This is the time to ensure that your leaders understand and agree on the company's direction and focus. Time away at a management retreat can be just the tune-up your leadership engine needs.

- 1. Get out.** Effective retreats should not be held at your place of business. It may seem efficient to just declare a certain date as "retreat day," and hold it in your office. Resist the temptation. A change in your surroundings will not only reduce distractions, but it sends a strong message that retreat time is not business as usual.
- 2. Spend time preparing.** Ideally, retreat participants will meet in several sessions prior to the actual retreat. Spend this time understanding any crossroads issues for the company. Your retreat agenda can be prepared around these and other business priorities the participants have agreed to. Then, give participants plenty of time to think and prepare by providing them with "homework" and open ended questions prior to the retreat. Participation soars when people have time to ponder important points and shift into retreat mindset.
- 3. Use an outside facilitator.** A trained facilitator can work with your goals and design a retreat format that makes the most of everyone's time. He or she can lead your team in exercises to look at present challenges and future opportunities. As a leader, you will be able to devote your energy to participating fully in the process, letting the facilitator worry about the details. You'll get more out of the retreat and so will your leadership team.
- 4. Assign responsibility and accountability.** During the retreat, be sure to develop action items and next steps. Ask participants to volunteer to "champion" each item and assign time frames for accomplishing the tasks. Talk about the resources that will be required and plan to make them available. Specific tasks usually get accomplished. General plans usually don't.
- 5. Don't try to accomplish too much.** The most common complaint heard after a retreat is "We didn't do what we said we were going to do." When you probe a little deeper, you usually find out that the group accomplished some of the goals, but not everything. This is often the result of trying to do too much! Set reasonable expectations for your group and stay focused on those goals. Even if you accomplish only half of what you hoped for, you're further along than you were before.

Businesses fail because they don't take the time to plan for their success. You make investments in machinery, buildings, and inventory. You can't afford not to make an investment in your leadership team. With proper planning and execution the returns will be worth it. When's your next retreat?

McLean, Koehler, Sparks & Hammond helps owners and business leaders become more successful by providing innovative financial, technology and management solutions for every stage of their organizations' life cycle. MKS&H's organizational consulting division, Tandem Partners, specializes in people strategies that drive business results. For more information on this article or MKS&H, please contact Margaret Wilson at 410-296-6200 or via email: margaret@mksh.com.

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