

Planning Your Next Strategy Session



I love facilitating strategy sessions.

I love the way businesses find ways to distinguish themselves from the competition and I am always fascinated by the way people find all sorts of different ways to behave (or misbehave) with each other in group settings.



I think a well designed Strategy Session should mix critical business decision making along with essential team effectiveness and personal development work, I find that one always feeds off the other.

But given that they don't always work as well as they should, here are a few thoughts about how to make your next strategy session a success.

1. If it is worth doing at all, then do it well

You are already committed to spending your most valuable resource of all i.e. the time of your senior executives, so don't waste that investment on a mediocre event.

Hire a facilitator

For god's sake hire a facilitator, it will probably cost less than the travel and accommodation bill (and just as an aside – while you may be an excellent meeting participant the chances are that you are rubbish at facilitating one).



If you are the most senior person in the group then at different time you will want to be (1) a participant and just one of the group, and (2) the “boss” who needs to exercise some authority and make a decision. Your facilitator is there to help you move between them at the right time and make it clear when you are one or the other.

In any event, you should be able to concentrate on being a good participant and leader of the group, enjoying your own opportunity for personal development and let the facilitator worrying about group dynamics, keeping on time, managing energy etc.



"Oh, man! The coffee's cold!
They thought of everything!"

Select a good venue

It doesn't have to be luxurious, but don't try and do it in your normal office environment (unless you want it to be a normal business meeting and no more).

The best places for these meetings are the purpose built conference and meeting venues that we are blessed with in Australia – they not only have all the facilities you need but the good ones are designed to promote thought, reflection and concentration. They are not so common in other parts of the world and I really notice the difference when I am trying to facilitate a strategy meeting at the Lancelot Function Room in the local hotel ("Certainly Sir, just turn right when you go past the Excalibur Bar and Grill and it is next to the Johnson Wedding celebration").

Give yourself enough time

Yes, everyone is busy but you need enough time. Rushing to decisions simply because it is time to move on is just stupid. Difficult issues need time to be discussed, reflected on and resolved.

The other benefit of time is that it gives you the opportunity to build relationships between participants. An investment in building good relationships will pay off handsomely when you need your top team to work together and support each other when things get tough. Building an effective senior team is important business work!

If you don't have enough time for everything you have planned then reduce the number of things you are trying to do!



2. So what should be on the agenda?

The first thing the facilitator you just hired will ask you is “So at the end of session what do you want to have achieved?”, and you may find that question surprisingly hard to answer. Think carefully - you can try to achieve maybe 2 or 3 complementary objectives - but not much more than that.

How to choose between options

The big differences between a strategy session and one of your normal business meetings are likely to be things like:

1. Everyone is in the same room at the same time
2. You have an extended period of time – not just 2-3 hours
3. You are free from interruptions and distractions
4. You can organise rare expertise and resources to be on hand
5. You have someone there to manage the group process

Pick topics, issues, tasks that can only (or are best) done while those circumstances are met and leave the rest for your regular business meetings. Resist the temptation to waste this rare opportunity on the mundane or business as usual!

Probably not for the Strategy Session	Good for the Strategy Session
<ul style="list-style-type: none">• I could tell them about it individually• I am (have) making that decision myself anyway• We can all have our own views on this and express them differently• It falls within business as usual• It won't change our ability to work effectively once we leave the meeting• We can deal with this issue quickly• Doing this won't change us personally or as a group	<ul style="list-style-type: none">• We need to be together when we deal with this• We need to decide this as a group• We need to have a shared understanding and a common way of talking about it• It might change something fundamental• Doing this will improve our ability to work together in the future• We will need time and unusual insights, and then think deeply and reflectively, before we can decide• This will develop us individually or as a team

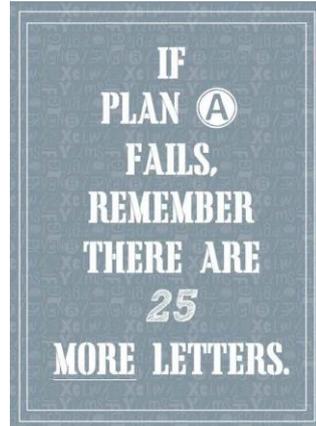
6. Planned but not pre-determined

You need to plan how you will approach the session and have an objective in mind, but don't be rigid in your thinking or use it as a means of manipulating people towards a pre-determined outcome.

Senior people will know when something is already decided – don't insult them by telling them it is still up for debate. And don't try and manipulate them – remember they are meant to be on your side! Having said that it may be necessary to spend time communicating the reasoning behind a key decision that has already been made, listening to views, and consulting about implementation – but tell them up front what is up for decision and what is already determined.

Your facilitator should prepare a plan for you which mixes different activities and topics and allows for a sensible approach to an issue. They should allow time for reflection as well as action and ensure that everyone has a chance to contribute (not just the best or quickest talkers).

Having done all that planning then be prepared to throw it all out the window and deal with whatever the pressing issue in the room is! I usually have an hour by hour schedule drawn up just so I make sure that I take account of breaks, energy flows and the like – but I almost always end up changing it by the time we get to the last afternoon based on what we do and learn on the way through.



7. Some final random thoughts for you

And finally, here is a random sample of things you might want to do at your next strategy session.

1. Have a mixture of intellectual business type stuff and interpersonal people oriented stuff. They are equally relevant and moving from one to another helps keep minds fresh and engaged.
2. Are you close to one of your operating sites, if so what can you do with some of the local staff that will involve them and expose them to senior leaders
3. Program in some time to think! Our most senior people usually have the least amount of time to spend on thinking because they are too busy responding. Intend to work slow, leave space to allow people time to reflect on the things that are important but not urgent.
4. Social interaction is important to the functioning of any team! Build in something that improves the social cohesiveness of your senior team – it will pay dividends.
5. If there is conflict and disagreement within the group decide how you are going to deal with it. Pretending it doesn't exist is usually not a good option.
6. Be clear about whether you are seeking input to help you make a decision, or you want the group to make a decision with you, or you are explaining a decision and seeking understanding and support. All are relevant but they are very different, make sure everyone knows what the task is.

7. Resist the urge to develop a list of 20 or 30 follow up actions that nobody expects will get done but everyone dutifully agrees to. 2-3 things will be more than enough, or maybe no new actions at all – wouldn't that be a pleasant surprise!
8. Use experts with caution – they can present views, challenge preconceptions, provide insights but they can't make your decisions for you (or if they can why do you need to have a meeting, just get them to tell you in an email).
9. Make sure people walk out of the meeting more closely connected than they were before - able to act independently but in concert.
10. Get out of the office, go somewhere nice and peaceful. When people are in the office they are deep in their normal operating psyche – the chances of any new, deep or insightful thinking while they deeply rooted in the place of their normal routine is limited.
11. Finally, make sure you are truly enthusiastic about the opportunity – if it sounds like a “tough couple of days” when you are planning it I can promise you it will be even worse when it happens.



David Gunzburg
Principal – DGHR Services