



Successful Strategy Days

Make your strategy days enjoyable and bring long term business benefits

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How to design strategy days that work

To be successful, strategy days need to generate ideas, take place in an environment that stimulates freedom of thought and involve the right people. Without a clear plan and enough structure you cannot have a successful strategy day.

There is a risk the strategy day could become a pointless talking shop where the loudest voice wins or where eventually the accountant begins to hyperventilate and forces everyone to come up with a “realistic” budget to ensure you get something tangible from the day. Don’t let this happen to you. With our top tips for planning and facilitating a business away day of any kind, you can be confident of success.

Top tips for planning

Why

Having clarity is essential for the success of the day itself and needs to be worked through before any logistics are considered.

Is it related to a specific project or area of the business? Is it to improve a process, resolve issues? Or is it a wider more general day around business direction? Don’t try and tackle every business issue you have in one day.

Being clear on why you are having the day will allow you to communicate that message beforehand so that everyone knows, or should know, why they are coming along and what they are expected to contribute. It also allows you to frame exactly what is appropriate to discuss on the day and what is not relevant. This will avoid people jumping on their pet subjects or the day lacking direction. Taking time over the ‘why’ will save you time, energy and possibly money later in the process.

“Without a clear plan and structure you cannot have a successful strategy day“

Who

When you know why you are having the day, the 'who' will become a lot easier to decide. Not everyone needs to be there although often organisations feel they need to invite everyone even if they are likely to add nothing or, worse still, disrupt the day. The goal is to have a successful strategy day so make sure that you set yourself up for success by inviting only the people that need to be there. We have facilitated strategy days where a couple of the very senior people, who were unlikely to be helpful, were excluded. Whilst it was a delicate message to give and receive, it was essential and all those who attended commented on how much more productive and helpful the day had been with the others not there.

The other side of this is that you need people with the right skills on the day and that may be the very people who challenge and question, not the 'positive people' who will get all excited and agree. A successful strategy day is about getting a successful strategy, not getting everyone to agree all the time. Some appropriate and respectful challenging is necessary and helpful and will ultimately create a better strategy. This requires that the day is led by a strong and skilled facilitator whether internal or external.

Where

While it is not essential for everyone to fly out to some retreat in the Bahamas, the location is important. Unless there is absolutely no alternative, the day should be held outside the normal working office. If the strategy day is held in the same place that management meetings and other regular events are held, people will naturally be anchored to their normal thinking and patterns. This is unlikely to create the right environment for quality strategic thinking.

Local hotels and the like are fine provided that they have windows to let in natural light and space for people to move around. The environment is much more important than many leaders and organisations realise and often a strategy day does not deliver what is hoped for because of the environment in which it was held. Beware of using venues where the space is free if you buy refreshments, the lower level of service can be a distraction so try them out first.

When

Much depends on why you are having the event. A strategy day from 9 to 5 or even 10 to 4 can be very effective if structured and led well. Regular half days can be brilliant without disrupting business too much. Longer days or even 2 or 3 day strategy events are unlikely to create a better strategy and much more likely to drift into too many areas, too many thoughts and ideas. It may sound like a great idea to have an 8 until 8 strategy day or a 3 day 'get everyone in a room' type idea but these are less likely to create a better long term effect strategy than shorter more focussed days.



**“Set yourself up
for success by
only inviting
those people who
need to be there “**

Time does not necessarily equal quality, particularly if the group know each other well. People can get caught up in the ideas of a day (or days) and can lose perspective. A series of sessions over a period of time that build on each other are often much more effective and successful as they allow ideas for each session to be reflective and acted upon and the feedback evaluated.

With whom

You will definitely need someone whose role is purely to facilitate the day. The only question is does this need to be an internal or external facilitator? There are benefits and drawbacks of both. If the day is to be facilitated internally, make sure the person has the ability to do it and the ability to be open minded and flexible. It is hard not to have an opinion or bias when you are part of an organisation.

Facilitating a strategy day is not the same as chairing a meeting or running a board meeting. If the person facilitating is the CEO or other senior person in an organisation. there is a real danger that it follows the pattern of all other management meetings.

External facilitators can be of great help to organisations for strategy work. The same rules apply - i.e. that they need to have the appropriate skill and open mindedness to run the day.

Be clear about what you need them to bring. Some have relevant industry knowledge or maybe choose behavioural experts if that is part of your discussion. They can add much more to the day than just orchestrate it. It is important for a facilitator to be independent and be willing to challenge all parties in the room, even the person paying the bill.

Top tips on the day

Create, state and hold boundaries

If you are using a facilitator then they should do this and if not, whoever is leading the day should. It is not enough to say 'people need to be allowed to speak, all ideas are welcome and we want people to be open.' These boundaries need to be maintained. If someone speaks over someone else, they need to be reminded. If someone is open they should not be attacked, ridiculed or put down in any way.

Often too much time is spent setting the boundaries or ‘ground rules’, much to the irritation of those keen to get started, and then the agreed rules are not maintained. Our tip is, spend a short amount of time on it at the start and have someone make sure they are maintained throughout the day.

If there is a structure to the day then be clear about it, and then be prepared to be flexible depending on what happens. The goal of a strategy day should be to bring out opportunities, problems, disagreements and identify some clear steps forward. It is not to get a signed up agreement to something. That is a plan and you don’t need a day out for that. All too often, in the desire for tangible outputs, strategy days can be far too rigid in their structure and the desire for the day to ‘come up with a plan’.

Take time for issues and ideas to develop

Successful strategy days flow, they go where the comments and the ideas take you. It’s always a tricky balance between holding to a plan or agenda and going with the flow, that’s where an experienced facilitator is worth their weight in gold.

Often a breakthrough moment comes just after people are feeling exasperated, stuck or fed up, for example. Someone needs to understand the people element and group dynamics and work with what is happening to and with the people in the room. Make sure you take time for breaks as this is when people assimilate and recharge their energy which is essential.



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Agree outputs

After investing so much time and effort into organising the day, it can be tempting to want as many outputs as possible. This can be counter productive as people drown by combining their actions with their day to day jobs and this can cause things to stall. Likewise, one person (usually the leader or HR person) ends up with 101 things to do. Focus in on agreeing to small steps and ensure that everyone has some responsibility or action. This is how successful businesses move forward.

Get buy in

Running out of time or energy is a common situation, but make sure you save some time at the end to backtrack and ensure there are no unexpressed objections or issues at the end. People often dread this because of fear that someone will derail the whole day. However, if you don't, people will take their issues back into the workplace and will derail it afterwards. So issues are best handled in the room with the group who has been through the process. A good facilitator will make sure things stay on track. It's also a good idea to take a few minutes at the end to recognise your achievements and successes so that you finish on a high.

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**“Save time at the
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Top tips for maintaining momentum

Have a short group check in within a month

This ensures people get started and this is key to success. Even a 30 minute call to check on progress and any issues that arise moves things along.

Don't rely on people updating a system or spreadsheet

Ideas often lose momentum because the extra hassle of maintaining yet another document is too much. Instead have short, crisp check in points and have someone (with project management skills) take responsibility for collating updates.

Decide on the day when to next regroup

Have your next session in the diary when you leave the strategy day. Many businesses have something regular every three or six months and this is a healthy routine that keeps people on track.

Can we help?

If you have any questions regarding your strategy day or if you'd like more information on our facilitation services and strategy support, please call us on 0117 4501407 or get in touch by email at info@monkeypuzzletraining.co.uk. We look forward to hearing from you.