

## Leading the Transformational Retreat

*Use a powerful coaching model to design a strategic process using the focal point of an event accelerate sustainable behavior change, achieving your goals for your organization*

A new leader we'll call Audrey took on a challenging new role. She would need to dial up the rigor, energy, commitment and effectiveness of her team if she was to succeed in a marketplace that had been changing profoundly. She also realized she had to make some tough personnel calls to produce the results she envisioned. She would need everyone to become much more creative, proactive, and productive. We worked with her to create a transformational one-day retreat for her people that involved outside research to understand what other organizations similar to hers were doing, interviews with all participants to engage them in clarifying what was working and what needed to change, pre-work for everyone and a creative setting out of the office that allowed people to relax, enjoy the experience and think differently about their roles, the mission of their department and how they could forward it. It was a huge success. People took on new responsibilities and practices. They spoke about the retreat for weeks afterward, how fun and energizing, and yet productive the experience was. There was a new vibe among her people, even as some left.

Shortly after the retreat, she found herself in an emergency. A critical marketing document that historically took over a year to create due to the detail, approvals and the nature of the organization, had serious issues rendering it unusable. She would need over 10,000 copies of a replacement version in six weeks or miss an important marketing launch that would impact revenues. She got her people together to brainstorm what resources they might need or innovative way they might address the issue. Together, they came up with a plan and produced a superior result internally that all previous evidence had said was not possible, creating a huge early win for her newly energized and aligned team.

A retreat can be a turning point for your organization, a transformative tool for setting a new tone and direction, impacting how people communicate, think about their roles, and the team, and infusing new enthusiasm and commitment into how they operate and what you can achieve.

Investing in the right shared leadership development experiences and practices, customized to address specific challenges and goals, can accelerate establishment of a new level of energy, focus, discipline and results for your organization.

When might you want to invest in a transformational retreat? Here are some instances when you could see enormous payoff.

### **New Leadership**

When a new leader comes on board, it can take time to gain the respect of existing team members, and get everyone working well together. It can be difficult for employees used to prior leadership to fully appreciate this new leader, who is likely changing the group dynamic, and upsetting the “natural order” they’ve gotten used to.

A strategically planned retreat, using our powerful six-question coaching model, which identifies the desired shift in behavior, can support a transformation from an attitude of adversity or indifference to a mood of acceptance, respect, and collaboration. The team has a chance to get to know the leader away from the distractions of day-to-day issues, and they have conversations they have not previously had. They can explore how their roles are changing and what they can create together. How the leader communicates, sets the tone, makes requests and follows up is critical to the effectiveness of the retreat.

### **Merger/Acquisition**

When two organizations come together through a merger or acquisition, there’s plenty of room for difficulty. Operations and expectations within the two entities will certainly have some variation, and the necessary transformation involves finding a new standard, or path that everyone can agree on.

Achieving this kind of transformation takes significant preparation, including clear standards for how you want the combined operations to work, and the internal and external reputation you are building. Engaging the hearts and minds of people is critical to success.

The transformation involves letting go of “the way things used to be” and internalizing the need for a way of working that meets the new goals of the merged institution.

A retreat among senior leaders can be a powerful tool for realizing the promised value of the merging organizations, creating a sense of spirit that builds on the best of both, and aligning on the all-important process of engaging others with a sense of meaning about what they are co-creating together. Leaders focused on the apparent financial benefits of the merger may not plan enough for the significant productivity and attrition losses that can take place without the right investment in engaging and aligning leaders and their teams.

## **Broad Restructuring**

Sometimes companies have to go through *massive* changes. It could be an entire shift in products or services offered, an update in processes or systems that affects the entire company, new employee standards, or anything else that impacts many people across different departments.

The way in which leaders and their teams communicate and operate profoundly impacts the culture of the organization and what's possible in it. The transformational retreat process can be cascaded through various leadership levels to accelerate adoption of the changes.

Much like in a merger, it's important that everyone understands and internalizes the need for the changes, and that leaders plan for any resistance they might have to the new ways of doing things.

## **Creating New Energy**

Over time, people may settle into a less-than-ideal pattern of thinking or behavior, and need to refresh enthusiasm and focus. A transformational leadership retreat can be a powerful tool to reset expectations and set a new direction.

Planning and executing a shift may be somewhat different for every team or individual. However, it's about getting new clarity about measures for success, and what's important now, given the principles the organization operates by and those it serves. It's also about getting everyone excited about their individual contributions – and the successes they can achieve as a group.

These are just a few examples that could necessitate a transformational retreat. Any scenario that requires a large-scale change not just in practices, but also the way people think and see their roles individually and as a group requires a transformation.

*Jackie Sloane, MCC is an executive coach and consultant who works with leaders to create transformational interventions and retreats for public sector, Fortune 500, privately-held and not-for-profit entities.*

Contact Jackie to explore how a Transformational Leadership Retreat might accelerate what you are seeking to achieve. [Jackie@sloanecommunications.com](mailto:Jackie@sloanecommunications.com) at 773-465-5906