

## Using a Highly Interactive Retreat to Launch a Transformation

*Using a powerful coaching model to design a strategic process and event can accelerate achieving your goals*

*What shift are you looking to create in your organization?*

When we work with clients to create and lead a Transformational Retreat, we begin with determining the goal. Leading a Transformational Retreat is a process that begins with clarifying a transformational goal with leadership. Sometimes, there are a number of ambitious goals, some of which can be accomplished or begun as a result of the retreat experience. We see the retreat as a focal point in a process that creates clarity and gathers and releases the energy and enthusiasm that will provide the momentum that supports the achievement of the other, larger goals, that may require new practices, processes and structures. Without this clarity and enthusiasm, adopting new ways of thinking and doing things can be so much more difficult.

Most industries and organizations are dealing with varying magnitudes of change. Yet, there continues to be evidence that most “change management” initiatives - as much as 70% - fail to achieve their objectives.

*What if the reason “change management” isn’t successful is because the focus is too small?*

In nature, true change is transformative. It is lasting and there is no way to go back to the way it was. In organizations, many projects and programs are focused around tinkering at the edges. As a result, there are occasional alterations, but a dramatic shift in productivity, effectiveness or results is not common. Fundamental issues haven’t been addressed. In the end, people get frustrated

because the change seems to be an interruption in getting their jobs done, is not meaningful to them, or doesn’t make sense. They don’t see a reason to let go of what is familiar.

In planning the Transformational Retreat, we work with leaders to create and engage their teams in an experiential process that is meaningful and important to them. Transformational change requires a clear, powerful vision and engaging people in solving the problem and creating the way forward. Engaging people to think and act in new ways can’t be accomplished by “broadcasting” what you want in a few memos, emails or meetings.

Anil once worked with a client to implement a talent management program. The basis of it was to develop role profiles and competencies for each position in the organization. The notion of it was noble - develop a holistic approach to hiring, developing, promoting, succession planning, etc. On the face of it, no one could argue with it. Yet, no one really believed it would make a real impact because of larger cultural issues and practices that remained unaddressed. It was seen as a bolt on to a process that was already broken. It was an addition on to a house that was already not laid out well.

Incremental change to a system, process or organization that people see is not functioning well leads them to believe there will be no change. The answer is not to “tinker” around the edge but to evaluate what is working, what is not and to create the new, meaningful way forward that engages others in what’s possible.

That may not seem practical. How will work be done in the meantime? Transformational change doesn’t happen all at once. It is the culmination of a radically different vision that begins the transformation through generative conversations and relationships with everyone involved. *The process and system are changed as a matter of course due to the shift in the way people think, talk and act.*

As organizations continue to experience more disruptive change, we believe *transformational leadership* will replace the current thinking called “change management.”

The good news is, leaders don't need all the answers. They can engage their people in creating the way forward.

Creating an intentional transformation requires an inquiry that leads to that powerful shift in context. It's similar to the model we use to create a transformational retreat – a powerful tool you can use to launch a change in direction, focus, level of commitment, or other change.

Start by creating an inquiry, asking these questions:

*What's the urgency for the transformation now?*

Clarifying the urgency is critical to creating meaning, essential to true engagement. It is important to address the reason for transforming now:

- Why is a shift needed?
- Why now?
- What happens if you do nothing?

There may be a change in the marketplace that impacts revenues or profitability, a shrinking customer base, new disruptive technology that forces a change, or, a window of opportunity. Whatever the issue, the reason for a change needs to be big and compelling.

*What's the transformational goal?*

Clarify the ultimate goal, the desired outcome. It's not to be “more nimble.” That is nibbling around the edges. It's not clear enough, so will not result in transformation. Transformations are big shifts. Hone in on a goal that is the linchpin to all the upcoming big changes.

*What needs to be in place to achieve the goal?*

What external or internal information or evidence is needed to support this intentional transformation?

It starts with interviewing those people that are going to be impacted by the transformation. Uncover the gap between where the organization is now and where it wants to be in the future. This process can include questions designed to engage participation, ownership, their contribution to the outcome.

It also is imperative to do some benchmarking against organizations that have reached the goal. They may or may not be in your industry but it is vital to get an understanding of their journey, and learn from it, build on it.

*How do you prepare people who will be impacted by the change?*

How you speak about it, the conversations you have and don't have will impact what people hear and the result you can achieve. People resist change when they feel like it's being done to them. Transformation happens when the people impacted have a voice, and experience being heard and involved. It is absolutely critical to ensure that those impacted by change are involved in developing and implementing the transformation. Successful transformation occurs when the people that are impacted by it understand that it's coming, why and embrace it.

—Anil Saxena and Jackie Sloane

*Jackie Sloane works with leaders to create transformational interventions and retreats for public sector, Fortune 1000, privately-held and not-for-profit organizations.*

*Contact Jackie at Jackie@sloanecommunications.com or 773-465-5906 to learn more about how a Transformational Leadership Retreat might forward what you seek to accomplish.*