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Dear Reader,

Chances are that you have participated in at least one offsite meeting over the past 6 months. How was it? Did it meet your expectations? Even the unspoken ones? Did it exceed your hopes, or did you complain about the waste of time later at the water cooler?

Whether you were involved in the design or as a participant, many times you have the opportunity to influence the design of an offsite meeting, both before and during the meeting.

Here I have prepared a multiple-choice Quiz, as a fun and interactive way to test your attitudes about the "basics" for successful offsite meetings. The responses below are my own, --there is no absolute right or wrong answer- but they are based on our experiences designing and supporting offsite meetings.

Enjoy the experience!

Isabel Rimanoczy  
Editor

Quote of the Month

*"The meeting of two personalities is like the contact of two chemical substances: if there is any reaction, both are transformed."*

*Carl G. Jung (1875-1961)*

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# LIM NEWS



*We develop your leaders while they develop your business*

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## SUCCESSFUL OFFSITE MEETINGS

(A Quiz with Answers at the End)

By Isabel Rimanoczy

*1. Where to start? When planning an offsite meeting, the first thing to do is...*

- a) Run a creative brainstorming session with the organizing team, to come up with new ideas to include in the meeting
- b) Ascertain the budget available
- c) Check the possible dates that would work for all
- d) Identify someone who has expertise (inside or outside your organization) to help you with the planning
- e) None of the above

**2. *Who needs to be involved in the planning?***

- a) All the participants
- b) The Team Leader
- c) A few participants
- d) HR support professionals

**3. *What role should the team leader have during the meeting?***

- a) Behind the scenes role, low profile, standing back
- b) Pacesetter, establishing and ensuring the tone and the rhythm of the meeting are maintained
- c) Chairperson, facilitator
- d) Only opening and closing

**4. *A meeting can be deemed successful when...***

- a) The business purpose is achieved
- b) Networking results are achieved (people get to know each other better)
- c) Participants develop some new skills, engage in learning
- d) Broader organizational issues are addressed
- e) Team issues are addressed
- f) It depends on each case

**5. *When designing the offsite meeting you realize that you cannot do all you wish, and need to take out something. Which of the listed items could be made optional and taken out?***

- a) The Evaluation Form handed out at the end
- b) Some items of the work Agenda
- c) Some breaks
- d) Debriefs
- e) Fun activity

**ANSWERS**

### *1. Where to start?*

**e) None of the above.** While these are all important things to do, it's essential to start defining the outcomes you (or the meeting owner) want to achieve. What is the purpose of the meeting? Why are you having it? Once you have given enough thought to the outcomes you want to achieve, the selection of participants, activities, location, dynamics and activities will be assessed based on how they contribute towards achieving the stated outcomes.

### *2. Who needs to be involved in the planning?*

**b) First, the Team Leader.** This is a key person to be involved in the design, especially in setting the purpose and the outcomes, and providing input from past experiences of what worked, and what didn't. The leader's expectations need to be articulated to assess how they match the desired outcomes. Sometimes a leader has ideas for activities that either do not support the stated outcomes, or are not the best way to achieve them. It is also important to clarify the precise role of the leader during the meeting.

**Also c) A few participants.** It can be most helpful to invite a few participants to work on the planning of the meeting, as this will not only give them the a chance to represent the thoughts and feelings of their peers, but it will also build commitment to the aims of the meeting. We have found that it can be particularly helpful to invite those who are less enthusiastic about the idea of the meeting, as this will give them an opportunity to express their concerns and think what must happen to make it a successful meeting, in their opinion. People have a need to be heard, and those who have a strong opinion should be given special attention. The involvement can do miracles. If for some reason they are not able to become part of the organizing team, they should at least be specially interviewed prior to the meeting to hear their concerns and suggestions.

In addition to this, **a) All the participants** should be involved in some manner before the meeting, and be given the opportunity to influence the planning. Depending on the size of the group, you can consider these options:

- Send out the overall outcome and ask for items that they consider should be included in the agenda
- If several levels of employees are invited, send the above out to the team leader's direct reports
- Send out the overall outcome and a draft design and invite input, giving a certain deadline for responses

However it will be important to let the participants know that all their input will be considered in relationship to the outcomes, and included wherever possible.

If it is a small group (5-9), it is useful to include all the participants actively in the design. As far as HR support (d), it is convenient but optional, depending on your resources. HR support will bring valuable additional expertise.

### *3. What role should the team leader have during the meeting?*

The answer to this question will very much depend on the outcomes set for the meeting. If the purpose of the meeting is informing the participants of something, i.e. a merger or some reengineering decisions, the activities may be focused on transmitting clear information and answering questions, in which case it may be a central role, only shared with other people involved in informing or clarifying questions.

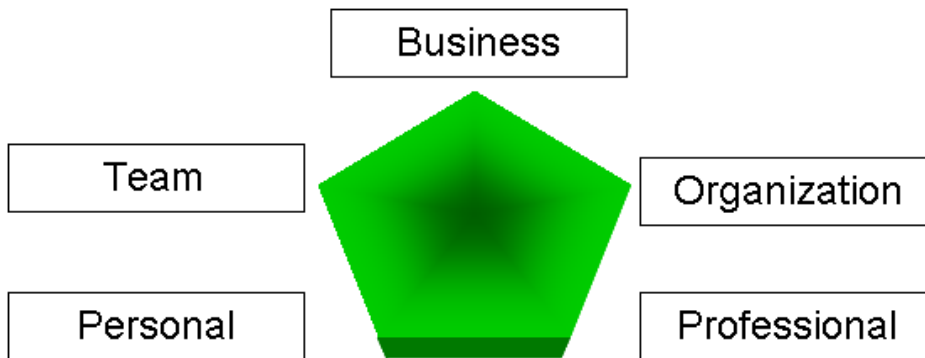
However if the offsite meeting aims at outcomes that require participation and involvement of the audience, like project work, presentations, building agreements, developing common ground, etc – in that case the leadership should be shared.

The main role of the leader could revolve around opening and closing the meeting, giving occasional input when direction setting is required, reinforcing values, maintaining a positive atmosphere and assisting in creating a safe environment. The more the leadership of the different activities is shared, the better involvement and productivity you will obtain. It isn't easy to develop a powerful group if all the power is centered in one person. However leaders have an important role in representing and guaranteeing key shared values, i.e. risk taking through creative thinking, participation, mutual respect, etc.

**In that case, the answers would be b) Pacesetter, setting the tone and d) Opening and closing.**

### *4. A meeting can be deemed successful when...*

**a), b), c), d) and e).** Independent of the outcomes, size, duration and location of the meeting, it will be most successful if you take into consideration addressing issues on the following five levels:



If you run a meeting without anchoring it in **real business issues**, it will lack grounding, it will probably be perceived as mere entertainment with no connection to the "real world".

If you design it with no attention to the **personal behaviors and attitudes** that the organization values, and which the participants are manifesting, you will miss the powerful tissue that connects people: who they are, how they relate to each other, their feelings and thoughts. Make space for people to express themselves intellectually, emotionally, sharing personal preferences, and giving insight into who they are outside work.

In every meeting many things contribute to an effective session, and to miss the opportunity to highlight those aspects, is to rob the participants of the opportunity to learn something from the experience, and to apply it in other situations. Any meeting has the potential for **professional development** of the participants, if only there is time built in to debrief what happened, what made it work, etc.

**Team dynamics** happen, whether the offsite meeting brought together an intact team or members of different teams. If you meet as one team, make sure that the key processes of high performing teams are included (such as setting norms, agreeing on decision and planning processes, etc.). If your meeting brings together people who are part of different teams, think of highlighting the key team processes that are required for the day and link those with the context "back home", and how everyone could apply them there.


The **Organization** is the larger system in which teams and individuals interact. Consider the connection between the agenda and the larger picture, the broader organizational framework in which the participants work, and which will be impacted by the results of the meeting. Make sure your meeting fits into the existing organizational context. For instance, if there is uncertainty or pain occurring in parts of the organization, it is counterproductive to ignore the fact in the meeting. If rumors exist about the company's future, address those rumors.

**5. When designing the offsite meeting you realize that you cannot do all you wish, and need to take out something. Which of the listed items could be made optional and taken out?**

Multiple choices, multiple answers. b) Our experience has shown that there is always an item in the Agenda that can be taken out and worked in a different way; (c) that breaks can be shortened and replaced by more frequent shorter ones; (e) that some fun activities, while important for relaxing and reenergizing, tend to be longer in relation to the impact they have, in other words, look for short but intense fun activities.

The Evaluation Form is a key instrument to receive feedback and learn about the experience, in order to improve the next meeting, and experience indicates that people don't fill it out unless they have to do it before leaving the room. Finally, the Debriefs should be a non-negotiable. A debrief is a unique opportunity to exchange learnings, impressions, feelings, to assess the productivity of a session, reflect on the process used and its efficacy, how it could be applied in other situations. Debriefs invite participants to reflect, something the fast paced organizations don't normally encourage, and yet reflection is the safest way to get where we need to be: It takes just a minute to reflect. Debriefs help people stop and increase self awareness; they also encourage the practice of active listening, confront us with different perceptions and increase our tolerance, and finally help making meaning. Don't skip debriefs!

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Finally, a meeting doesn't end with the closing. The success of a meeting will be defined by the consequences and impact, by what changed on Monday. So make sure there is a process to capture decisions and next steps, clearly agreeing on who will be doing what by when. The leader will have the task of following up on the assigned commitments. Credibility depends on this little last thing. 



**June 7, 2005**

**"Designing for Learning that Lasts"**

**Ernie Turner, LIM; Urban Skog, AstraZeneca**

**Practice-Oriented Education (POE) Conference -- Boston, Mass.**

**Attend this Session!**

**"Action Reflection Learning"**

**Tony Pearson, LIM – Beena Vilas, LIM**

**Conference Overview, June 14-17, 2005**

**<http://wace2005.waceinc.org/overview.html>**



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