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Strategy Session Logistical Considerations: Setting Your Leaders Up for Success

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A well-designed strategy session has the potential to take the collective vision and voice of an organization's leadership and weave a narrative and plan to amplify the mission's impact exponentially for years to come.

Or, it can be a total flop where the leaders walk away wondering why they just wasted two days of their life.

Recognizing this potential, most organizations are meticulous in their selection of facilitator, in their alignment of dates to get everyone together, and in their preparation of background material so everything is tee'd up.

Yet, some basic considerations about the retreat experience itself are all too often overlooked or deprioritized – small elements that, when they add up, can limit the potential of the session.

01

Consistent Brainfood (and drink)



Even the most captivating facilitator or interesting conversation will turn into the sound of the teacher from Charlie Brown if the attendees start to experience an energy dip from hunger or thirst. With the acknowledgement that F&B costs are not insignificant, if you are investing in bringing your leaders together, this is not the place to cut corners.

By providing the means to snack throughout the day or refresh a beverage when needed, you provide your attendees with the ability to keep their blood-sugar up, to perk back up when the afternoon drag inevitably sets in. Recently I experienced a group who served lunch at 11:45am, then nothing through the end of the session at 5pm. The last two hours, you could feel the energy level plummet.

Bonus idea

Cookies are easy and cheap, and the high sugar provides a quick hit with a crash. Instead, consider what you would like to graze on throughout the day. Take health factors into consideration as you provide options.

02

Sound



Unless the group is a dozen or less, or the room is particularly small (which has its own limitations addressed later), order a microphone. I was recently facilitating with a group where two participants – one of them a Board member – pulled me aside to indicate that they had hearing impairments and couldn't hear what their colleagues were sharing from another table.

There are proactive ways before a retreat to respectfully inquire about the needs of participants to fully participate in a session so they don't have to request additional support mid-session. The potential of a strategy session is DIRECTLY correlated to how well participants listen to and understand one another.

If they cannot hear each other – they will never reach understanding. Assume that a microphone will always be helpful.

**Order a
Microphone**

03

Physical Setting



Design the room and seating with a clear understanding of your leaders' needs. I was recently with a group where a Board member had ambulatory difficulty due to knee problems.

The room we were in was only accessible by going up and down stairs – and while we were seated downstairs for the session, the meals, the breakout tables, and most importantly, the restrooms were all upstairs.

To add insult to injury, when the room was set for the Board meeting on the second day, they put this person at the seat the FURTHEST from the stairs requiring a longer walk to access the restroom and other spaces.

Caring for your leaders means caring for the whole person. Be the expert on understanding what environment will create the best experience for them and doing anything you can to arrange that environment with accessibility in mind.

Care for your
Leaders

04

The Power of Light

I recently had a number of back-to-back strategy sessions where half were held in internal rooms that had no windows and half were held in space with plenty of natural light.

I am sure you can guess what I am going to say...guess where the leaders were more awake, more creative, and had more energy as the day went on.

Acknowledging the limitations of site selection and lodging costs, whenever there is the possibility of using a more inspirational setting – a retreat setting – the more your leaders will feel they are in a different space and will think differently.

At a minimum, provide meeting and/or breakout space where there is natural light to raise the bar of possibility.



**Natural
Light**

05

Power and Wi-Fi



While we never want retreat attendees to be working while they are focusing on the strategy session, we should acknowledge that people have different approaches and aptitudes when it comes to learning.

Any creative process means you should be capturing your insights and reflections throughout the day so they can build upon one another.

While some capture those by pen and paper, others are more adept at typing.

Other groups I have worked with seek inspiration and insight online while they are discussing items of strategic import.

Additionally, consideration should be given as to whether the facilitator will incorporate digital methods into an in-person facilitation.

Regardless of the circumstances, the attendees are going to ask for power and for WiFi.

Be Prepared

06

Creative Tools

Strategy sessions are meant to be creative.

Organizations should think about and work with their facilitators to have the right supplies on hand to encourage creativity. Some examples include:

- a Paper
- b Markers
- c Bonus

a Paper

Yes, the hotel probably provides free pads in the room – but they are small, meant to jot down a few words. Bring a ream of printer paper and give participants the chance to really write, draw, or doodle.

b Markers

(or fun pens)
I can not explain why this happens – but when attendees are offered a chance to select an array of differentiated-color writing instruments, for many it is like tapping into childhood glee. Think about what you can provide so they can use some different tools.

c Bonus

Fidgets became all the rage for students, children, and young adults. Guess what? Adults like them too! You can order variety packs of hand fidgets to have on the table. They can really help attendees occupy their hands as their minds are at work.

Strategy sessions are meant to be creative.

07

Room Set



Before you set the room, reflect on what you are trying to achieve.

Is the strategy session meant to be an evaluation of a pre-set list of ideas and then a vote, echoing a Board meeting? It is meant to be more interactive and creative? Work with your facilitator and meeting planner to create the right creative space for full group, small group, and even paired/individual interactions.

This may require some breakout space, or even a different design than what you usually have, and it will subtly imply the work to be done is different than in other meetings.

**Reflect on
what you
are trying to
achieve.**

08

Names

BIG, FRONT, AND CENTER – Do not assume everyone remembers everyone else's name. Even if they have all worked together before and there is no one new in the room, some are better with names than others.

Also, the facilitator may not know everyone's names yet! Make name placards with the names nice and big – don't worry about all the small font indicators of geography or where they work or their position. The purpose of a name placard is to help with the name. The rest can come out in introductions.

Each of these ideas takes additional time, effort, and resource to put into effect.

Yet, if you read through them and picture the strategy session experience with all accounted for and then again without, hopefully you can see just how different the experience can be.

For most organizations, a strategy retreat is a significant investment in time, treasure, and talent. If you are already making the investment, then including these incremental additions to create an exponentially better experience will result in long-term gain for the organization.

What elements have you added to increase comfort and creativity during your retreats?

