

Published by Bee Eventive, LLC | 2018

WHY A CORPORATE RETREAT IS GOOD FOR BUSINESS

PETE BOCKELMAN,
ALYSSA SHANE &
THERESA TRONOLONE



Table of Contents



Chapter 1

The Power of
Corporate
Retreats

Chapter 2

Top Five Reasons
for a Corporate
Retreat

Chapter 3

Guide to Planning
a Successful
Corporate
Retreat



CHAPTER ONE

The Power of Corporate Retreats



The Power of Corporate Retreats

Does your company need to develop a more collaborative team?

Solve a problem?

Communicate better?

It's likely that a one to two-hour in-house meeting will not give your staff enough time to solve these kinds of issues, improve your corporate culture, or stimulate truly creative out-of-the-box thinking, which is why corporate retreats can become a valuable solution. "When organizations institute positive, virtuous practices they achieve significantly higher levels of organizational effectiveness — including financial performance, customer satisfaction, and productivity ... The more the virtuousness, the higher the performance in profitability, productivity, customer satisfaction, and employee engagement," according to Kim Cameron in the journal article entitled [Effects of Positive Practices on Organizational Effectiveness](#).

Changes and improvements can occur during corporate retreats where employees have a chance to get out of the office to strategically and (hopefully) honestly think about

The Power of Corporate Retreats

and discuss positive leadership and practices. Employees can become more motivated and empowered if they feel they are being involved in the process of establishing the company's goals and objectives or by being tasked to play a part in solving problems. Team building and corporate retreats not only boost the morale of employees, but they also can increase the success of your business.

Additionally, corporate retreats offer an opportunity to select programming that is not "all business" and instead allows relationship building in an organic, stress-free environment. Not only does this also boost employee morale, but also improves corporate culture and employee connectedness.



The Power of Corporate Retreats



In a Harvard Business Review article titled [Positive Teams Are More Productive](#), author Emma Seppala discussed the results found by Audible’s Chief Product and Marketing Officer, Louis Gagnon, when he scheduled a corporate workshop.

“ The two-day TLEX retreat in upstate New York started with an exercise where 18 of Gagnon’s leaders split into groups to define “what is leadership.” After collating the results, the group realized that 95% of all attributes referred to “soft,” not “hard” skills. Gagnon reports that this staff was pleased to hear that for 2-days, soft skills is exactly what they would be focusing on – no corporate goals, no strategy, no alignment – but mindfulness, personal mastery, connectedness and collective action. At the heart of the curriculum: breathing exercises. “Our team was engaged, opened and excited to have the rare luxury to focus on themselves as individuals — individuals as a conduit and lever to ourselves as a team. We all felt deeply rejuvenated and at peace with each other. That, ultimately, built trust – the ultimate ingredient to teamwork.” ”

TLEX is the abbreviation for Transformational Leadership for Excellence.

Seppala, E. (2015, March). Positive Teams Are More Productive. *Harvard Business Review*. Retrieved from <https://hbr.org/2015/03/positive-teams-are-more-productive>

The Power of Corporate Retreats

If done right, corporate retreats can be something workers look forward to participating in. When employees trust that the purpose of the corporate retreat is authentic and their voices are valued, appreciated, and can even have an impact on the future of the company, corporate culture, or a specific project, participants are far more likely to be invested in the experience before they have even left the office for the retreat. Of course, if there is some “fun” on the agenda or something that employees feel will be an opportunity that is unusual, exciting, or will improve their lives personally, this is also a helpful tactic in engaging employees from the moment of adding the corporate retreat to their calendars. The opportunity exists to create a positive buzz from the moment a corporate retreat is announced; a buzz that will increase morale. Morale boosters lead to happier employees, a stronger workplace community, and increased employee investment and commitment to the company.



Corporate retreats provide a vital service for businesses in improving employee engagement, which is extremely important to impacting not only business success internally, but also



The Power of Corporate Retreats

external success and growth. An article in GALLUP News titled [How Employee Engagement Drives Growth](#) discusses a Gallup study on the relationship between employee engagement and performance outcomes across 192 organizations in 49 industries and 34 countries. “Gallup researchers studied the difference in performance between engaged and actively disengaged work units and found that those scoring in the top half on employee engagement nearly doubled their odds of success compared with those in the bottom half. Those at the 99th percentile had four times the success rate of those at the first percentile.” The author, Susan Sorenson, goes on to provide specific percentage differences,

**“WORK UNITS IN THE TOP QUARTILE IN
EMPLOYEE ENGAGEMENT OUT PERFORMED
BOTTOM-QUARTILE UNITS BY**

10% ON CUSTOMER RATINGS,

22% IN PROFITABILITY,

AND 21% IN PRODUCTIVITY.”

Sorenson, S. (2013, June). How Employee Engagement Drives Growth. *GALLUP News*. Retrieved from <http://news.gallup.com/businessjournal/163130/employee-engagement-drives-growth.aspx>



CHAPTER TWO

Top Five Reasons Your Company Needs to Budget for a Corporate Retreat



Why Budget for a Corporate Retreat

1) It builds company spirit and overall positivity.

There are days when the daily grind is going to get to your employees, no matter their level. There are also days where things are status quo or perhaps even good, but a little rejuvenation will get that atmosphere and your employees mindset to great. A corporate retreat can do that as the very notion of getting out of the everyday monotony of the work place can lead to a re-energized work force; one that is excited for work and more productive as a result.

If your company opts for the sunny beaches of Florida or the mountains of Colorado, either one could offer your staff the needed jolt to feel good, solve an on-going problem or develop better lines of communication.

Mark Duvall of [Old Man's Cave Chalets](#) was quoted in the HuffPost article, [Why Corporate Retreats Need to Make a Comeback](#). He said, "Getting away from the office and computers allows them to connect with one another and focus on high level strategy, without the usual distractions."

2) Opportunity to bond.

Your company may conduct work happy hours, schedule free lunch Friday's or host fantasy football leagues in an effort to

Why Budget for a Corporate Retreat

create a bond within the workplace. While these are not a bad idea to develop a bond amongst your employees, some may see these activities as forced, which can actually have the opposite result you are attempting.

Getting your employees out of the office during a corporate retreat allows them to have a shared experience that can provide a commonality that will help them to feel more comfortable with one another once back in the office. They have the opportunity to get to know one another in a neutral environment and begin or even continue developing friendships built on shared experiences. These types of bonding experiences are more likely to create an emotional attachment to your company and one another, which can also lead to less staff turnover.

3) Ability to train staff in a fun environment.

Often the best learning experiences are ones where people don't even realize they are learning. A corporate retreat offers a company the opportunity to include creative skill building programming that to the employees feels fun, but has additional less recognizable goals. The more developed your employee's skills, the higher expectations your company should have; as you can expect to see business handled more efficiently, stronger problem solving, increased teamwork, and more. A corporate retreat environment is a perfect place to hone and sharpen skills to enhance communication, creativity, and problem solving.

Why Budget for a Corporate Retreat

You can also use the skill building training at retreats as a way to reinforce your in-office training efforts throughout the year.

4) You don't know what you have until you can get everyone together.

Not only is it challenging for company leadership to remember all of their employees' assets and skills, but often colleagues are unaware of their co-workers abilities. A corporate retreat offers the opportunity to remember and recognize employees' skills, while also encouraging employees to appreciate one another and heighten respect among co-workers. Kyle Kesterson, founder and CEO of Seattle-based animation startup Freak'n Genius, discussed



Why Budget for a Corporate Retreat

his experience attending a Global Shapers retreat in The Entrepreneur article [5 Reasons Why a Retreat Is Good for Your Business](#): "In one session, participants listed their areas of expertise and discussed what they could do to help the others. 'With such a high-performing group, it took up a whole board,' he says.

5) It's an investment in your company and employees.

The Entrepreneur article [5 Reasons Why a Retreat Is Good for Your Business](#) goes on to include a quote from Denise Blasevick, CEO of The S3 Agency, who says, "Generally the money isn't that big a deal unless you're doing something really outrageous. The cost is not doing it, in my book."

Carefully planned retreats will motivate employees to creatively participate in setting goals, objectives and contributing to the decision making process. In addition, effective corporate retreats generate unique approaches for handling long-standing and difficult organizational issues.



Why Budget for a Corporate Retreat

If money is the only thing stopping your company from planning a corporate retreat, know that there are ways to create a corporate retreat that are more affordable. Any kind of well planned, authentic in purpose, and out-of-the-office experience, whether for a large group or a small, for a shorter period of time to a longer period of time, will be beneficial to your company and employees.

Key decision makers within businesses often miscalculate the intricacies of developing, preparing for and conducting a retreat. Whether you are the decisionmaker for a large company or a team leader with 10 team members, this guide, will ensure you get off to good start creating a successful event that meets your company's goals and objectives.



“It's an investment in your business. "Generally the money isn't that big a deal unless you're doing something really outrageous," Denise Blasevick, CEO of The S3 Agency says. "The cost is not doing it, in my book.”

Dembling, S. (2014, February). 5 Reasons Why a Retreat Is Good for Your Business. *Entrepreneur*. Retrieved from <https://www.entrepreneur.com/article/231195>



CHAPTER THREE

Guide to Planning a Successful Corporate Retreat



Guide to Planning a Successful Corporate Retreat

The following pages will help you get a sense of what is needed to begin developing a successful corporate retreat. There are a lot of details to address, which can certainly get overwhelming. Take one step at a time. If you and your colleagues are too busy to plan your company's corporate retreat or planning an event like this is not in your wheelhouse, hire an event management company to help. The right company will work with you to understand your needs, likes, and dislikes and will help you formulate what will work best to make your corporate retreat successful.

Step #1: Identify the goal of the corporate retreat.

The first step to creating a successful corporate retreat is to envision what you would like the event conclusion to look like. Bottom line, try and identify what the missing element is within your company, team or staff or determine what exists but needs considerable improvement. Is it communication, a lack of team bonding, a need for greater morale or is it just that your staff needs a change of scenery to solve a problem? If a problem can be identified and a goal therefore set, then the better chance of accomplishing the goal and achieving the initially envisioned event conclusion.

Guide to Planning a Successful Retreat

Once the goal of the meeting has been identified the corporate retreat can be used to:

- ◆ allow people who are located in different geographical regions or who travel a lot the opportunity to connect in person
- ◆ create a better bond between staff in an office or organization
- ◆ determine the status of a project and identify possible solutions
- ◆ develop creativity and synergy around the goals and objectives of the company
- ◆ engage your staff to create a degree of shared ownership in the goals and objectives of the company
- ◆ engage in a deeper discussion that involves all the key stakeholders
- ◆ further develop your employees' skills

Step # 2: Who is going to facilitate the event?

It is possible to lead the corporate retreat yourself, but is that the right decision? Oftentimes, in particular when there are internal conflicts or a lack of trust, it is not advisable for a member of the company's leadership, such as the CEO or a manager, to lead an event as it is challenging to maintain an impartial position. Brainstorming sessions or lively debates should allow employees to respectfully contribute without

Guide to Planning a Successful Retreat

judgment or intimidation. So a good alternative is to hire a facilitator, one who is a good listener and discussion leader. Effective facilitators should assist companies in outlining the goals and mission of their corporate retreat, as well as tracking goals, objectives and feedback during the sessions they facilitate. A great option for any size company is to hire an event management firm to work with you on all elements of your corporate retreat from travel and location logistics to the work and “play” portions where the event team will also help you in selecting and hiring the facilitator who best meets your needs.

Step #3: Corporate retreat logistics

Corporate retreats are a time to bring the entire team together in one relaxed space where no one has to stress over day-to-day tasks. It is a time where a company can put names to faces, get to know each other's personalities in real life, and of course plan for the growth of the business. There is something special about getting the entire team together.

Where and when to go?

When picking a location and timing, be sure to consider the time of year and seasons. Make sure to research the area and find out what the weather will be like when you plan to go. Of course, you can book a tropical location in the offseason to save a ton of money, but is it worth it if your team is stuck indoors for the duration of the trip because it is too hot or there is a chance of severe weather?



Guide to Planning a Successful Retreat

You are asking your team to leave home and family obligations so it is important to space retreats out and to be considerate of everyone's personal lives. The company needs to keep in mind that employees have lives outside of the office (kid's birthdays, vacations, anniversaries etc.), so picking dates means having to take into consideration the schedules of each team member. Try to keep retreats in the same months each year, and at least six months out placing a "hold" on two separate weeks with the team so they can plan ahead.

Try to stay near a major transportation hub, so the majority of the team can get there quickly, and so employees don't have to spend hours after their flight getting to their destination. Sure a tropical destination sounds amazing, but when it takes 10+ hours to get there you've already burned a lot of time traveling.



Guide to Planning a Successful Retreat

Who should attend the corporate retreat?

Who attends the event depends on the goals and objectives of the corporate retreat. Participants can range from the CEO to Senior Managers and to a work team. Deciding who should attend the corporate retreat is not easy. A mixture of large groups, breakout sessions, and small group activities are often necessary in order to achieve effective outcomes. It is better to err on the cautious side when determining ultimately who will attend the meeting and really think through your employees and departments as they relate to your goals and objectives, as well as how they relate to your corporate culture. It is also better to invite more than to omit possible key staff who could influence the ROI of the corporate retreat. Remember, a corporate retreat is a wonderful way to impact morale and create a happier, stronger workplace community, as well as re-energize employees.

How many days should the retreat be?

Opinions vary. Some feel the sweet spot for retreats is seven days/nights. The thought process is that the length of time helps people traveling a long way adjust and get over jet lag, as well as gives the team time to warm up to one another. Seven days really works out to five days of programming and actual retreat time, because day one and day seven are for travel.

However, if seven nights is too long, then something is better than nothing. Be sure that the goals set



**7
DAYS**

Guide to Planning a Successful Retreat

can be accomplished in the amount of time allotted. You will want your employees to enjoy themselves and to feel that the experience was rewarding and worth their time. One way to do this is to include “fun” and to ensure that everyone feels the corporate retreat accomplished something. So setting attainable goals in the amount of time you have available is very important.

Getting to and from the corporate retreat

Always try to book direct flights. Depending on where your employees are located, this could mean that the most direct flights to vacation destinations are on a specific day of the week. For example, if the majority of your employees are traveling from an airport with more direct flights to your corporate retreat destination on Saturdays, look to schedule retreats Saturday-Saturday. When booking flights, do your best to have everyone arrive at the same time. Getting people in at the same time or in groups reduces the additional costs for transportation to and from the airport. If people come in scattered it requires a lot more logistical planning including check-in time, transportation, and meals.



Guide to Planning a Successful Retreat

Developing the retreat agenda

Having an agenda for the corporate retreat is very important. An agenda assists everyone so they can come prepared to be productive and know what to expect, as well as helps the organizers and company leadership ensure that the corporate retreat has the over-riding outcome they have envisioned. Detailed agendas should include who should be in attendance and the goals and objectives of each program. If you have underlying goals you wish to not share with attendees (ie - boosting morale, encouraging positivity, etc), at the very least provide the more obvious purpose of programming.

It is critical to plan for the right mix of business, activities and free time. While talking shop may be the priority, there is much to gain from corporate retreats with regards to employee morale, bonding, teamwork building, and employee investment. So, "fun" should be a consideration and at least a small ingredient when building the agenda. If a company can afford it adding some fun to the trip has its advantages. First, it can help get employees excited about the retreat. Second, it can provide time for informal discussion and help your team get to know each other better. In the Inc. article, [How to Plan a Company Retreat](#), Bruce Withrow, founder of Meeting Facilitators International, said, "Just the time together at dinner and talking about the Olympics or whatever, I think that that helps with communication."

Guide to Planning a Successful Retreat

The key to a successful corporate retreat is finding the right balance of work and play based on the goals of the event and knowing your corporate culture. How do you figure that out? You can enlist and engage staff members by creating a planning committee and/or taking a survey. Should you decide to create a committee, be sure to select representatives of each team who will be attending the corporate retreat so as to avoid any issues. You may even find sticking to leadership is best. If you plan to hire an outside event management company and facilitator, the event team along with the facilitator should certainly be included in the agenda planning. Depending on the purpose of your event, the event firm and facilitator will be able to also contribute some ideas that may not come up otherwise.

Step #4 – Implementing the corporate retreat

By the time everyone arrives, everyone should know the goals and objectives of the meeting, have a detailed agenda and timing of each event. There are a number of ways to kick off your event. Many start with an all-hands meeting.

All-Hands Meeting

The purpose of the corporate retreat will really dictate the look and feel of the opening meeting. Whatever the situation, it is best to gather everyone together to start the retreat off on the right foot; setting a tone for the atmosphere and “feel” of the retreat. The all-hands meeting can be equal parts pep rally and important business updates.

Guide to Planning a Successful Retreat

This first session provides the opportunity to share with attendees the purpose of the retreat, the desired outcome, and any boundaries that may need to be set in place depending on your goals and objectives. For example, if this retreat has been planned to create better lines of communication where employees need to show one another more respect, then the attendees need to be informed that interrupting each other is considered unacceptable and full participation is expected.

This gathering is also a chance to explain the strategy behind the agenda; not only what the intention is with each session, but also why in that manner whether it is a large group setting, a break-out group, or something fun like a scavenger hunt or group activity. Adults often do not appreciate doing things without explanation; so, in particular if you have those types of personalities attending your retreat, be sure to communicate the “why” as well.



Make sure that attendees leave this initial session feeling positive and engaged. The likelihood of accomplishing your corporate retreat goals and objectives is greater when everyone “buys” in.

Guide to Planning a Successful Retreat

After the opening session, there are many different options for grouping your employees in a productive way; from the group at large in a meeting setting to smaller breakout groups, from ice-breakers to team-building, from playing games to bringing in a motivational speaker or entertainer. You will have planned all of that while developing your agenda. Further explanation on some options follow:

Team Time

It is critical for each team to have dedicated opportunities to meet and plan for the future. For teams not working in the same office space, this face-to-face time is even more important. Even if your company is co-located, dedicated team time is still an important opportunity to brainstorm outside the office in new surroundings to inspire new ideas.

Deep Dive Talks

A few weeks prior to the retreat, ask the team to nominate a speaker from the company and a topic they want to learn more about. After a weeklong nomination period, take the top ten suggestions, create a survey, and ask everyone to vote for their top five talks. The winners prepare a 30-minute presentation on their topic.

Personalizing Positivity

Including a session (or more than one!) in your agenda that is focussed on building each individual employee up will certainly go a long way. Often employees are or feel critiqued and criticized versus recognized for what they are good at. Incorporate in your agenda a personal

Guide to Planning a Successful Retreat

development session that allows each employee to hear what they are great at, why they are valuable to the company and their colleagues, and how much they are appreciated. They may feel embarrassed, but there is no doubt that they will feel good about what is said and carry a feeling of positivity for knowing the positive impact they make.

Discuss Problem-Solving and Create Conversation

The article [4 Unexpected Benefits of a Company Retreat](#) in Entrepreneur explains an exercise called “Nightmare Cards” that not only helps employees to relate to one another, but also gives everyone a chance to brainstorm ways to handle situations or hear success stories from their colleagues. “You separate into groups and employees write down their worst department or industry-related nightmares. By doing this exercise, people are able to openly discuss their fears and stressors while having the support of their team.”



Guide to Planning a Successful Retreat

A Fun Activity Could Become a Corporate Tradition

During the agenda planning process, a survey can be the key to unlocking shared interests among the employees who will be attending your corporate retreat. Maybe it is an activity they enjoy at home with their families or something that brings back memories of being a kid. Maybe it is a food they love to eat. Based on the feedback you receive, it may be easier than you imagined to plan an activity everyone will enjoy. It may be so loved that it becomes a part of the corporate culture of your company.

Brandon Bruce, Co-founder of Cirrus Insight, wrote in his Forbes article titled, [How To Plan A Company Retreat That Combines Work And Fun](#), “Two social activities that will always be on our retreat agenda are a big family-style meal and a ping-pong tournament. People talk about the ping-pong tourney all year, so it’s become a cornerstone of our shared company culture.”

Step #5 – Meeting Recap

No matter the goals and objectives of your corporate retreat, it is important that the participants realize the learning process does not end at the conclusion of the event. Once your staff returns to the office, the results need to be measured and the critical question needs to be answered - “Did we accomplish what we set out to accomplish?” In addition to the information that is

Bruce, B. (2016, August). How To Plan A Company Retreat That Combines Work And Fun. *Forbes CommunityVoice*. Retrieved from <https://www.forbes.com/sites/theyec/2016/08/03/how-to-plan-a-company-retreat-that-combines-work-and-fun/#631f27057b30>

Guide to Planning a Successful Retreat

typically measured for most meetings, there are seven other areas that can be measured as part of the Phillips ROI Methodology.

Areas of Measurement for Determining a Successful Event per Phillips ROI Methodology

- 1) Inputs/Indicators:** measures event basics, such as number of attendees, costs and efficiencies.
- 2) Reaction & Perceived Value:** tracks attendee reaction to the event and intention for follow-up action.
- 3) Learning:** measuring what attendees are taking away from the program, knowledge gained, contacts made
- 4) Application & Implementation:** measures how attendees apply what they learned during the program
- 5) Impact & Consequences:** considers the changes to the business, such as productivity and employee engagement
- 6) Return on Investment:** measures the ratio of business impacts to meeting costs.
- 7) Intangibles:** measures the benefits from an event that cannot or should not be converted into monetary values, such as leadership skills.

Guide to Planning a Successful Retreat

“While only about five percent of an organizations meeting should be measured at Level 5 (ROI), every meeting should be measured on the basis of the value it brings to the organization, not just what it costs,” according to the Convention Industry Council.

Your company must continue to communicate the corporate retreat goals, manage expectations of not only the company, but also the staff, and ensure any key retreat action items are followed up and completed.

Without careful planning, company retreats have the potential to overwhelm and exhaust, leaving your valued employees feeling annoyed and resentful. A successful retreat requires a schedule balanced with meaningful work time, a variety of activities, and some free time. When attendees return to their daily tasks feeling refreshed, re-energized, positive and enthusiastic and goals and objectives were accomplished, you will feel the true benefits to planning a successful corporate retreat.



Take Charge of Your Office

Need help creating your successful
corporate retreat?

To receive a free consultation,
click the Learn More Tab.

[LEARN MORE](#)

The logo for Bee Eventive, featuring the word 'Bee' in a gold cursive font, a small bee illustration, and a dashed line forming a path. Below it, the word 'EVENTIVE' is written in a black, all-caps, sans-serif font.

Bee
EVENTIVE