

7 STEPS TO MOVING YOUR ORGANIZATION

BEYOND THE STATUS QUO

NEXT PRACTICES

- Keep your organization on the leading edge, increase your value proposition and remain ahead of the competition.

Read more about the seven steps to your "Next Pivot" Offsite

FACILITATION is ESSENTIAL

How you conduct your meeting is as important as the outcomes themselves. Once you have identified the need to do a strategic planning meeting with your executive team, it is important to decide whether or not to engage an external adviser to facilitate the meeting.



BUILD an "Emotional Arc"

At the end of the retreat, participants should feel energized and ready to act vs. beaten down by an overcooked agenda, or rehash of past failures.



CROSS-FUNCTIONAL FOCUS & UNIFIED MINDSET

Next practices are best developed across functions, where hand-offs occur and new standards and processes can be developed. Your offsite can be a source of significant breakthroughs if the different functional areas are allowed to "free-stream" ideas for improvements in a collaborative way.



RELENTLESS FOCUS on KEY OUTCOMES

1

What are the 3 to 5 highest value initiatives that your company needs to achieve? Will these initiatives produce both external market growth and build superior internal capability?

2

PRE-SESSION INTELLIGENCE



3

All relevant research on your industry space, current & forecasted market conditions and internal capability assessments should be done prior to the session so that the conversation is focused on action, not analysis.

4

FORWARD AIMING METRICS



5

How will you know you have arrived? Leading edge indicators, dashboards and visually oriented tracking techniques are all important to establish during the course of your offsite.

6

Finally, your employees are both your most important stakeholders and have the greatest impact on whether your strategy will work or you've just engaged in another "rope climbing exercise". Make these internal communications a top priority.



7

COLLABORATE and COMMUNICATE