

Portfolio Case Study



The work behind the value

Facilitating an Annual Leadership Retreat to Align Strategy, People, and Action

The Client or Team

The client was a large national organization with a complex division responsible for delivering high-quality work while managing increasing business demand, shifting priorities, and ongoing organizational change.

The work focused on a leadership team that needed to step back from daily operations, reflect on the current environment, align around priorities, and prepare to lead their teams through the year ahead. The broader division also needed a more consistent way to gather employee input, identify common themes, and connect team-level insights to divisional planning.

The Problem

The leadership team was navigating significant change, rising business demand, and the ongoing pressure to build capacity while continuing to deliver high-quality work.

The team needed more than an annual planning meeting. They needed a structured space to pause, reflect, and have honest conversations about what was working, what was creating friction, and where the division needed to focus next.

There were several challenges happening at the same time:

- leaders were managing day-to-day operational pressure
- teams were feeling the impact of change and competing priorities
- capacity was becoming harder to protect
- some work needed to be simplified, standardized, stopped, or improved
- duplication and low-value work needed to be surfaced
- leaders needed to align on what mattered most for the year ahead
- the division needed a more consistent way to involve employee voice in planning

The broader division also needed consistency. Leaders needed to leave the retreat prepared to continue the conversation with their own teams, gather input, and bring those insights into a larger

divisional planning session.

The risk was that planning would become either too high-level to be useful or too tactical to create real alignment. The team needed a process that could hold both strategic reflection and practical action.

At its core, this was a **leadership alignment, facilitation, and change planning challenge**: how to create the space, structure, and trust for leaders to reflect honestly, make clear decisions, and bring their teams into the planning process in a meaningful way.

Carrie was my leader for ten years and through her coaching and mentorship, has significantly contributed to where I am today.

My Approach

I designed the retreat as a **facilitated strategy, reflection, and action-planning process**, not a one-time leadership event.

The goal was to create a leadership rhythm that helped the team step back from daily operations, make sense of the current environment, and align on priorities to guide the year ahead.

My approach was grounded in human-centred facilitation and aligned to the principles of professional facilitation, including building trust, designing the right group process, creating participation, guiding the group toward useful outcomes, and staying neutral enough to help the group do its best thinking.

The design intentionally balanced business planning with the human experience of leading through change.

The process created space for leaders to:

- reflect on the previous year and the realities of the current environment
- name pressure points, barriers, and opportunities
- identify what needed to continue, stop, simplify, standardize, or improve
- discuss where duplication or low-value work may be reducing capacity
- explore where LEAN thinking or process improvement may be needed
- prioritize what mattered most for the year ahead
- clarify what teams needed from leaders during change
- define what leaders needed from each other
- prepare to cascade the conversation to their own teams
- reconnect at a larger divisional offsite to align priorities and adjust the plan

A key part of the approach was carefully sequencing the conversation. I did not want leaders to jump too quickly into solutions. The process needed to allow time for reflection, honest insight, shared meaning-making, prioritization, and then action planning.

The human lens was central. In periods of change, leaders often carry the pressure of delivery, morale, decision-making, and uncertainty. The retreat needed to create enough structure to make progress, but enough safety for leaders to speak honestly and think together.

Challenges or Constraints

The first challenge was creating enough psychological safety for leaders to speak honestly.

Teams often know where the friction is, but they do not always have the time, trust, or structure to name it clearly. To support this, I designed the process so leaders could reflect privately first, then share in smaller groups, and then bring common themes into the larger conversation.

This helped honest insights surface without forcing premature agreement or putting people on the spot too early.

Key actions included:

- designing a structured retreat process that moved from reflection to insight, prioritization, decision, and action
- creating individual reflection activities to help leaders prepare their own thinking
- using small-group discussion to surface themes in a safer and more balanced way
- guiding large-group dialogue to identify common priorities, barriers, and opportunities
- facilitating conversations about what to continue, stop, simplify, standardize, or improve
- helping leaders identify duplication, friction, and low-value work that may be reducing capacity
- introducing LEAN thinking as a possible response where process issues needed deeper analysis
- supporting leaders in identifying what their teams needed from them through change
- helping the group clarify what leaders needed from each other to work more effectively
- creating tools and guidance leaders could use to cascade the conversation to their own teams
- supporting the larger divisional offsite where team-level insights were shared, compared, and aligned

The second challenge was balancing reflection with action. Annual retreats can become too conceptual, while operational planning can become too tactical. I managed this by guiding the group through a clear sequence:

Insight → Prioritization → Decision → Next Step

This helped leaders move from discussion to practical alignment.

Leaders explored questions such as:

- What work is creating value?
- Where are we duplicating effort?
- Where might we need a LEAN session or process review?
- What needs to be simplified, standardized, or stopped?
- What must remain because it is working?
- Where do we need to create more capacity?

- What do our teams need from us during change?
- What do we need from each other as leaders?
- What matters most this year?

The third challenge was ensuring the retreat did not end in the room. Leaders needed to take the conversation back to their teams, gather input, and return with insights that could inform broader divisional planning.

To support this, leaders were left with a facilitation and planning approach they could use with their own teams. They continued the conversation, gathered team-level input, and brought those themes into the larger divisional offsite.

That larger session helped the division present plans, identify common priorities, adjust the approach, and align around the challenges and opportunities ahead.

Her ability to see the big picture and skill in strategizing creates a strong and motivating vision for her teams and has led to innovative outcomes and positive impacts on our organization

Outcomes

The retreat process created stronger alignment, clearer priorities, and more disciplined action planning across the division.

The work helped leaders move from individual team planning to a more connected divisional planning rhythm. Leaders had space to reflect honestly, identify what was creating pressure, and align on the work that mattered most.

Key outcomes included:

- **Stronger leadership alignment** around divisional priorities and the realities of leading through change
- **Clearer annual planning priorities** connected to capacity, quality, team needs, and business outcomes
- **Greater efficiency** by identifying duplication, friction, and lower-value work
- **Increased capacity for innovation** by creating space to simplify, stop, standardize, or improve work
- **More consistent planning conversations** across teams through a shared facilitation approach
- **Better use of employee voice** by having leaders gather team-level input before the larger divisional offsite
- **Stronger connection between strategy, operations, and people support**
- **Greater momentum for continuous improvement and LEAN thinking** where process friction was identified
- **More disciplined action planning** through clearer decisions, next steps, and ownership

The process also supported a strong leadership environment through change. Engagement remained consistently above **85%**, with psychological safety and manager support measures above **90%**.

These results mattered because they reflected more than a good planning session. They showed that people felt supported, heard, and able to contribute while the division continued to manage change and demand.

At the business level, the retreat helped create a more efficient and aligned planning process. Leaders were better prepared to make decisions, support their teams, reduce duplication, and focus energy on the work that created the most value.

At the human level, the process gave leaders and teams the space to name what was hard, clarify what mattered, and move forward with more shared ownership.

In practical terms, this work turned annual planning into a meaningful leadership rhythm — one that created honest conversation, clearer priorities, stronger alignment, and a more confident path for leading through change.

Why This Work Matters

In times of change, teams need more than direction. They need space to make sense of what is happening, name what is getting in the way, and align around what matters most.

This type of facilitated retreat turns annual planning into something more useful than a calendar event. It creates the conditions for honest conversation, practical action, and shared ownership across leaders and teams.

The result is not just a plan. It is a more aligned division, stronger leadership connection, and a clearer path for meeting the challenges and opportunities of the year ahead.