

Executive Team Offsite: Detailed Leader's Guide

Location: TBD

Meeting Purpose: Build relationships and create a shared vision for our future, fostering trust and aligning on strategic direction.

Desired Outcomes:

- Create Collective Purpose, Vision, and Values
 - Define strategic priorities to live our purpose and achieve our vision
 - Build trust in relationships and the team
 - Align the team to lead as one
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Ground Rules Reminder

Before the meeting begins, ensure the team understands and agrees to the ground rules. These can be briefly reviewed at the start of the day to set the tone for engagement and collaboration.

- **Be Present**
Encourage mindfulness and full participation. Remind the team that this is a time for deep focus. Ask them to stay off their phones and computers.
- **Wear your enterprise hat**
Ask participants to think beyond their individual roles and approach decisions from an organizational perspective.
- **Inquiry before advocacy**
Promote a mindset where questions are asked first before presenting one's own perspective. This ensures understanding before decision-making.
- **Ask questions and share opinions**
Foster an open environment for dialogue and exchange of ideas. Everyone's input is valuable.
- **Silence = Acceptance ~ Acceptance = Commitment**
If no objections are voiced during discussions, it's assumed that the idea or direction is accepted and all are committed to it.
- **Assume positive intent**
Encourage an atmosphere of trust where everyone assumes the best intentions behind each other's actions and words.
- **Focus on continuous improvement**
Emphasize growth and progress. It's not about making everything perfect but moving forward and learning together.
- **Anyone can call a swirl**
A "swirl" is a moment where someone can request to pause and clarify any confusion, point of misalignment, or stop a conversation that has been over discussed.

Agenda Breakdown with Leader's Guide

9:00 AM - Welcome & Introduction (15 minutes)

Objective: Set the tone for the day, ensuring everyone feels welcome and engaged.

- **Facilitator's Actions:**
 - Welcome the team and acknowledge everyone's time and effort to participate in this offsite meeting.
 - Briefly outline the meeting's purpose and desired outcomes. Emphasize that this session is for building trust and alignment as a team.
 - Encourage openness and honesty throughout the day.
 - Go over the ground rules to set expectations for how the team will interact with one another.
 - Share a quick overview of the agenda and timing for the day to ensure clarity and set expectations.
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9:15 AM - Create or Review Our Collective Mission Statement (1 hour 15 minutes)

Objective: Clarify and align the team on the company's mission, ensuring it reflects the team's collective vision.

- **Facilitator's Actions:**
 - **Review:** If a mission statement exists, review it together and evaluate if it still aligns with the current direction. If not, discuss areas for improvement.
 - **Collaborate:** If no mission statement exists, lead a discussion to craft one. Ask guiding questions like:
 - What is the core purpose of our organization?
 - Who do we serve, and how do we add value?
 - What impact do we want to have on our customers and society?
 - **Facilitator Tip:** Encourage participation from everyone. Write ideas on a whiteboard or digital collaboration tool to visualize the input. Narrow down the ideas and ensure everyone can see themselves in the final version. If the group is large, you can break them into smaller groups and have them edit or craft a mission statement together. Then, as a large group, discuss all statements and consolidate them into your final Mission Statement.
 - **Outcome:** Finalize a mission statement draft reflecting the team's discussion.
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10:30 AM - Create or Review Our Vision for the Future (1 hour 15 minutes)

Objective: Define a compelling vision that aligns the team on long-term goals and the company's future direction.

- **Facilitator's Actions:**
 - **Review Current Vision:** If a vision exists, review it and discuss its relevance. Does it still inspire the team? Does it reflect where the company is headed? Is it bold and big enough?
 - **Vision Exercise:** If necessary, facilitate a brainstorming session to generate a new vision statement. Consider asking:
 - What does success look like for the organization in 5 or 10 years?
 - What does our company look like when we're achieving our greatest impact?
 - **Facilitator Tip:** Create a safe environment where everyone can contribute. Use visioning techniques like visualizations or metaphors to get the creative juices flowing. Break into groups again if necessary.
 - **Outcome:** Conclude with a vision statement that is inspiring and clear, one that excites the team and aligns living your Mission..
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11:45 AM - Lunch (1 hour)

Objective: Provide a break for informal interactions and relationship-building.

- **Facilitator's Actions:**
 - Encourage the team to mingle and engage in light, informal conversations.
 - Use this time for bonding, especially between team members who may not work closely together.
 - Consider providing team-building prompts for casual conversation (e.g., "Share one interesting fact about yourself that no one here knows").
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12:30 PM - Create or Review Our Shared Values (1 hour 15 minutes)

Objective: Establish the values that guide the organization's decisions, behavior, and culture.

- **Facilitator's Actions:**
 - **Review Current Values:** If values exist, review them and discuss whether they reflect the team's current priorities.
 - **Define Shared Values:** Lead a discussion on what values are essential to success as a team. Possible questions to explore:
 - How do we want to behave as a team?
 - What ethical principles guide our decision-making?
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- What cultural traits do we want to cultivate in the organization?
 - **Facilitator Tip:** Use various methods such as sticky notes, group brainstorming, or digital tools to engage everyone in the process.
 - **Outcome:** Define 4-6 core values that are agreed upon by the team and resonate with everyone. Ensure these values are defined in behavioral terms so they are actionable and inspire the team to live them every day.
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1:45 PM - Create or Review Our 3-Year Strategic Initiatives (1 hour 15 minutes)

Objective: Establish strategic priorities for the next three years to fulfill the company's mission and vision.

- **Facilitator's Actions:**
 - **Review Existing Initiatives:** If there are current strategic priorities, review them and evaluate their progress and alignment with the mission and vision.
 - **Brainstorm New Initiatives:** Encourage discussion around the priorities that need to be pursued to achieve the vision. Ask:
 - What key areas must we focus on in the next 3 years?
 - What critical actions will drive our success?
 - What resources are required, and how will we measure progress?
 - **Facilitator Tip:** Help the team narrow down to 3-5 strategic priorities. Ensure that these initiatives are specific, measurable, and actionable.
 - **Outcome:** Finalize 3-5 high-impact initiatives, clearly articulating who owns them and how they align with the mission and vision.
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3:00 PM - Team Building Exercise (1 hour)

Objective: Foster deeper relationships, trust, and collaboration within the team.

- **Facilitator's Actions:**
 - Choose a team-building exercise that promotes cooperation and trust. Options could include:
 - **Top Golf, Ax throwing, Escape Room** or other fun activities.
 - **Trust falls** or other trust-building exercises
 - **Problem-solving challenges** that require teamwork
 - **Personal reflection** and sharing in pairs or small groups
 - **Facilitator Tip:** Choose an activity that matches the team's dynamics and promotes the desired level of engagement.
 - **Wrap-up:** After the activity, encourage a brief debrief where team members can share how they felt during the exercise and what they learned.
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End of Day:

- Thank the team for their participation and commitment to the day's objectives.
 - Remind the team of the next steps for following through on the decisions made during the meeting.
 - Reaffirm the importance of the collective effort in achieving the vision and strategic priorities.
 - Let them know that the meeting notes will be documented, and you will all meet to finalize in the coming weeks.
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This detailed agenda will help ensure the meeting is organized, focused, and results oriented. The facilitator's actions outlined above aim to guide the team through the day and ensure that the desired outcomes are achieved with the entire team alignment.

Expert Tip: hiring an external facilitator helps you to be an active participant on the team.