

# Strategic Planning Retreat Education Guide

Most retreat planners rely on educational presentations at the start of the retreat to convey key background information to stakeholders and lay the groundwork for the rest of the retreat. But while educating participants is critical to productive discussions, long presentations often exhaust stakeholders and detract from valuable conversations that truly necessitate in-person group time.

To avoid overwhelming participants with presentations, thoughtfully space out educational content before, during, and after your retreat. Before the retreat, send materials that you would like participants to reflect on and fully digest before engaging in strategic conversations. While pre-readings should cover most of the educational content you would like to share, your retreat presentations should quickly recap key elements from the pre-readings and introduce new strategic ideas to spark and direct conversation. After the retreat, keep your participants informed and disseminate key messages regarding the progress of your strategic plan development and implementation.

Use this Retreat Education Guide to learn how to offload the sharing of key background information from your retreat in order to maximize the value of face-to-face time during your retreat.

## Prepare Educational Content



First, identify what background information a stakeholder needs in order to engage in strategic conversations that support your desired retreat outcome. Then, evaluate whether the material is more appropriate to share as background reading before the retreat or in-the-moment during the retreat.

Pre-retreat readings should enhance participants' understanding of your health care market and highlight pertinent trends, legislation, and clinical developments. These background materials should prime your participants to explore more controversial, provocative, or confusing ideas, which are better saved for in-person retreat sessions where the message can be controlled, questions quickly answered, and immediate reactions observed. Accordingly, retreat presentations should provide a brief refresh of pre-readings and build off of them to frame the context of strategic conversations.

Pre-Retreat Material	Material to Share During the Retreat
<ul style="list-style-type: none"><li>• Update on organizational performance</li><li>• Explanation of market trends</li><li>• Definitions of industry terms</li></ul>	<ul style="list-style-type: none"><li>• Introduction of new strategic proposals</li><li>• Exploration of controversial issues</li><li>• Trending questions regarding pre-retreat readings</li></ul>

For example, if your intended retreat outcome is to prepare for market uncertainties, your retreat attendees will first need to understand where your organization is today and key details about potential policy changes, market "shocks," and other uncertainties. Pre-readings should lay the groundwork by defining your market position and explaining policy changes. Retreat presentations should then introduce potential market scenarios and any competitive intelligence to engage participants in scenario planning exercises and work towards achieving your retreat outcome.

Source: Frisch B, Chandler L, "Offsites That Work," Harvard Business Review, June 2006, <https://hbr.org/2006/06/off-sites-that-work>. Market Innovation Center interviews and analysis.

## Before the Retreat

When selecting pre-retreat materials, focus on collating only the insights and data that are most pertinent to your planned retreat topics. This might entail excerpting parts of news articles, summarizing policy changes, or highlighting important data in a chart rather than sending full articles, hundred page legislative memos, and extensive analyses. The goal is to create a manageable reading list that will level retreat participants' familiarity with the topic and get attendees to begin brainstorming for retreat conversations.

If your objective is to develop stakeholder buy-in, for example, consider sharing an executive memo outlining your organization's progress since the last strategic plan, as well as the strategic initiatives your team is interested in pursuing.

Consider including parts of the following in your pre-retreat materials:

- Executive memorandum
- Internal analysis
- External analysis
- Policy/legislature changes
- Journal articles
- News articles



Be careful to avoid overloading participants with hefty reading packets as this may dissuade participants from reading the materials and deter them from brainstorming ideas. As a general rule of thumb, your retreat pre-readings should be 20 pages or fewer and require no more than 45 minutes to read and fully digest.



Consider using bolding or highlighting to emphasize the key takeaways so even skimmers come prepared to contribute.



Convince stakeholders to read pre-retreat educational materials by emphasizing the impact this will have on maximizing their valuable retreat time. By reading materials in advance, participants will eliminate the need for traditional, long, didactic presentations and will have more time for meaningful strategic planning conversations and networking.

### Pre-reading Alternatives

In lieu of readings, consider having stakeholders attend a 45 minute online webinar or watch a prerecorded educational video one to two weeks prior to your retreat. If you use one of these options, be sure to send the slide presentation to participants after the webinar or concurrently with the education video.

If you know that your retreat participants are more receptive to in-person communication, consider providing the option to attend a pre-retreat meeting, where a presenter speaks through the pre-retreat reading content. This meeting should last no longer than one hour.



Source: Frisch B., Chandler L., "Offsites That Work," Harvard Business Review, June 2006, <https://hbr.org/2006/06/off-sites-that-work>. Market Innovation Center interviews and analysis.

## During the Retreat

Extended retreat presentations often wear out participants before the valuable conversations can even begin. Instead of relying on a traditional podium presentation, consider using one of the following exercises to both better engage participants in education sessions and to derive valuable feedback from participants' responses.

- ▶ To learn how to design effective educational presentations, refer back to our **Strategic Planning Retreat Checklist**.



### Round Robin Panel

<b>Purpose:</b>	To educate in an informal manner that elicits a full range of reactions
<b>Response Type:</b>	Open-ended
<b>Participant(s):</b>	Small groups
<b>Materials:</b>	Chart paper
<b>Example:</b>	In lieu of traditional podium presentations, speakers circulate the room and present their speeches to each group individually. Groups then have the opportunity to ask questions and debrief on the topic before speakers rotate.
<b>Pros:</b>	This allows for a more interactive discussion, where participants can ask questions and provide input.
<b>Cons:</b>	This exercise can be taxing on presenters and does not allow for the full audience to hear all participant input.



### Pre-reading Mosaic

<b>Purpose:</b>	To identify the pre-retreat educational materials of highest importance to discuss further
<b>Response Type:</b>	Multiple choice
<b>Participant(s):</b>	Full group
<b>Materials:</b>	Printed version of pre-retreat educational materials, stickers/Post-its in two colors, colored dot stickers, tape, wall
<b>Example:</b>	Tape all pages of the pre-reading to the wall in a mosaic style. Ask retreat participants to put green Post-its on the pages they agree with, red Post-its where more information is required, and colored dots to indicate low or high importance.
<b>Pros:</b>	This allows retreat facilitators and speakers to pinpoint areas to focus on in presentations.
<b>Cons:</b>	This requires subsequent presenters and sessions to quickly adapt based on feedback.

Source: Frisch B, Chandler L, "Offsites That Work," Harvard Business Review, June 2006, <https://hbr.org/2006/06/offsites-that-work>. Market Innovation Center interviews and analysis.

## After the Retreat

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To perpetuate the momentum of your strategic planning retreat, create a follow-up strategy to keep participants engaged in the retreat outcomes. A strong follow-up strategy begins within 24 hours of your retreat, signals the importance of the event and your team's commitment to shaping your organization's strategic future, and builds stakeholder and organizational trust through transparency.

- ▶ Refer to our **Post-Strategic Planning Retreat Checklist** to develop a retreat follow-up strategy.
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