

# Strategic Planning Retreat Toolkit

Use This Guide for Retreat Planning, Execution, and Follow-through

1

Identify the scope  
of your retreat  
**objectives**

Not all retreat objectives are created equal. While certain goals, such as unifying stakeholders and gathering input, are most effectively addressed through focused conversations with diverse stakeholders, other objectives can be more cost- and time-efficiently addressed through alternative channels.

- Define your retreat objectives
- Determine if the types and number of identified objectives are appropriate for a retreat setting
- Identify alternative channels for achieving different types of objectives



**Strategic Planning Retreat Decision Guide**

2

Plan for and design  
your retreat

Streamline retreat planning by using this checklist, which guides you through 18 key steps spread across three months.

- Balance retreat planning with other responsibilities by setting a timeline
- Delegate ownership of parts of the retreat to a team
- Avoid missing steps that simplify planning or improve your retreat's effectiveness



**Strategic Planning Retreat Checklist**

3

Prepare **educational**  
materials for  
attendees

Use precious retreat time to gather feedback and insights rather than to teach attendees material that could have been shared before the retreat.

- Identify what types of content are best shared before, during, or after the retreat
- Select the vehicle for sharing background information that is most likely to engage your attendees
- Gain attendee buy-in for pre-retreat reading or activities



**Strategic Planning Retreat Education Guide**

Source: Market Innovation Center.

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## 4

Select retreat **exercises** that advance your objectives

The most effective retreats minimize didactic lectures in lieu of sessions that elicit attendee feedback and promote collaboration across departments. Use this guide to make your retreat sessions more outcome-driven and productive.

- Learn about seven engaging exercises that will help you solicit participant ideas and feedback in key areas
- Select which exercises will best support your retreat objectives



### Strategic Planning Retreat Education Guide

One retreat exercise used by progressive organizations is scenario planning, which leverages stakeholder expertise to anticipate and prepare for market uncertainties and multiple possible futures. This workbook guides retreat planners and participants through a scenario planning exercise by role playing competitors, patients, payers, and physicians to brainstorm responses to market changes.

- Gauge the likelihood of different market “shocks” occurring in your market and identify early indicators of a “shock” to look for
- Anticipate stakeholder responses to market changes
- Identify proactive and reactive strategies for each potential stakeholder response



### Scenario Planning Workshop Guide

## 5

Follow through on insights, follow-up with stakeholders

You've gathered valuable intel, brainstormed productive ideas, and aligned stakeholders during your retreat—don't let the momentum end there. In the weeks following your retreat.

- Make retreat insights actionable
- Drive accountability
- Keep participants engaged in next steps



### Post-Strategic Planning Retreat Checklist