



**EXECUTIVE
OFFSITE
PLAYBOOK**





What is an offsite?

Offsites offer unique opportunities for Leadership teams to establish or deepen relationships, build trust, understand different points of view, establish team priorities, and determine strategy. Prior to 2020, most offsites were run at locations off campus from the day to day work locations for leadership teams. Offsites still hold value in a virtual world, and until people are comfortable traveling again, virtual offsites will remain an option for most organizations. At Velocity, we have found you don't get the exact same bonding experience virtually, but you can achieve a lot in less time.

For example, Company A is a large manufacturer in the construction materials space. Founded in 1886 and with facilities around the country, they have long been a major force in their industry. However, their competitive landscape is shifting rapidly as smaller, technology focused players eat into Company A's market share. Concerned that his leadership team wasn't taking this and other issues seriously enough, the CEO convened an off-site to determine their strategy for the coming year. Velocity Advisory Group was selected to co-design a two-day agenda focused upon operational challenges, the company's business strategy for the coming year, and leadership team dynamics the CEO felt were holding them back. With two new members of the executive leadership team adding fresh perspective, the CEO sought to reboot the team's sense of collective purpose.

Velocity led a series of structured workshops that surfaced lively discussions/debate around how the team could most effectively lead the organization and support each other. Utilizing a behavioral profile to create greater awareness around each team members strengths and focus areas, (an exercise then rolled out company-wide), the ELT engaged in candid dialogue that led to a teaming agreement that governs leadership team interactions to this day. Velocity then facilitated a session that identified 4 strategic priorities for the coming year with milestones assigned. Over the next few months Velocity worked with leadership to roll out the strategic priorities throughout the organization.

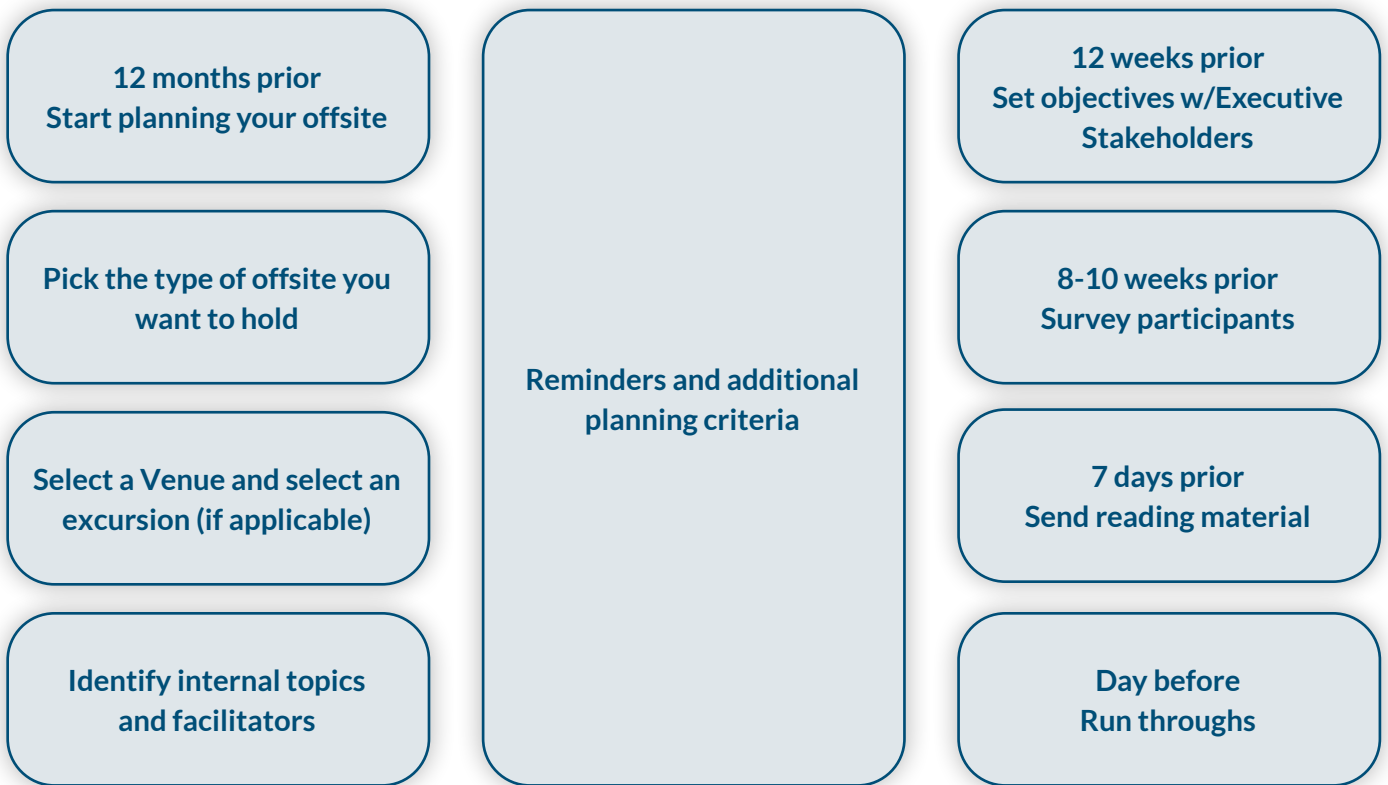
Leadership offsite's are unique opportunities to re-invigorate a team's purpose as the previous year's successes and challenges settle and the coming year's opportunities rapidly come into focus. At Velocity Advisory Group we bring over a decade of expertise in guiding these timely, critical conversations that lead to greater organizational clarity and health.



Offsites can take many forms...at Velocity we've found that there are 4 standard agenda formats most executives look for when creating a compelling session. This guide takes you through each of them with proposed topics for workshops, training, team effectiveness and team dynamics.

We have found that most organizations have better success in cutting through the politics and drama a team may show up with by having an external facilitator. **Most leadership summits end up being lost opportunities.** Someone who can keep the topics moving, hold to agenda timeframes and redirect conversations that may need to be addressed at another time. Having a third party facilitator means you get your achieved goal for your offsite faster.

Before you start planning your next offsite, use this guide to help you create a cohesive and meaningful experience.





12 Months Prior

Ideally you plan your off-sites ahead of time! If 12 months feels too long, you can adjust this time to 9 or 6 months, depending on how complex your off-site is going to be. Some key things to think about are:

1. What is your budget?

- Venue cost
- Food/refreshments
- Excursion
- Travel
- External Facilitator

2. Will it be in person or virtual?

- In person
- Virtual

3. If in person, do you have a venue?



4. Who is required for attendance?

- Departments
- Leadership levels
- Employee levels
- Internal support staff (HR, Comms, Finance, IT)
- Executive levels
- Partners/Spouses

5. What theme or topics do you want to include?

Some recommendations might include (click below to see sample agendas for each)

- > [Strategic Planning](#)
- > [Building an Intentional Company Culture](#)

6. Are you considering multiple vendors to help facilitate the off site (Audio/Video, entertainment, etc.)?

- Yes
- No

If yes, which vendors are you considering?



Venue ideas:

It's important to find a venue that encourages creativity, has an open floor plan and lighting that keeps people from dozing off. Need some ideas? Try these!

Art Galleries
Private members clubs
Retro Bowling alley
Ranch home

Virtual Venue ideas:

Microsoft Teams backgrounds- pick a fun and engaging board room scene or outdoor amphitheater!

Zoom- incorporate break out rooms, send everyone fun background options to hang behind them

Survey pulse questions:

What are the most critical topics we need to make sure we cover in our off-site?

Who would you like to hear from during the off-site (senior leadership, CEO)?

How would you complete this sentence? "I'd be really happy if, by the end of our time together, we _____"?



Strategic Planning



What is a Strategic Planning Offsite?

Strategic Planning Offsite Agenda topics:

- > [Essential Behaviors](#)
- > [Strategic Planning Workshop](#)



Essential Behaviors

In person (6 hours)

- Establish Goals for the Day (15 minutes)
- Difference between Values and Essential Behaviors (30 minutes)
- Break out session: what are our Essential Behaviors (30 minutes)
- Read out and identification of top 6 Behaviors (45 minutes)
- Created catchy phrases/words for each Behavior break out (45 minutes)
- Group review (90 minutes)
- Ways to reinforce (60 minutes)
- Next steps and action items (30 minutes)

Virtual (4 hours)

- Establish Goals for the Day (15 minutes)
- Difference between Values and Essential Behaviors (30 minutes)
- Break out session: what are our Essential Behaviors (30 minutes)
- Read out and identification of top 6 Behaviors (30 minutes)
- Created catchy phrases/words for each Behavior break out (45 minutes)
- Group review (60 minutes)
- Ways to reinforce (30 minutes)
- Next steps and action items (15 minutes)



Strategic Planning

In person (8 hours)

- Establish Goals for the Day (15 minutes)
- SWOT analysis (break out sessions) (45 minutes)
- Read out and prioritization (45 minutes)
- Communication Plan (60 minutes)
- SMARTER objectives (90 minutes)
- Break for Lunch (1 hour)
- Business Plan Development (2 hours)
- Next steps and wrap up (30 minutes)

Virtual (6 hours)

- Establish Goals for the Day (15 minutes)
- SWOT analysis (break out sessions & read out) (90 minutes)
- Communication Plan (45 minutes)
- SMARTER objectives (60 minutes)
- Break for Lunch (30 minutes)
- Business Plan Development (90 minutes)
- Next steps and wrap up (15 minutes)



Building an Intentional Company Culture



What is an Intentional Company Culture?

Velocity believes that culture must be established, enabled, and sustained over time. Our workshops help start the framework creation of creating alignment between leaders and mid-level managers shape alignment between vision, culture and individual performance. We partner with you to create a customized, research-driven approach using our Intellectual Frameworks to accelerate desired results.

Agenda topics include:

- > [Culture Survey read out](#)
- > [Team Climate](#)



Culture Survey results read out

Geared towards the senior leadership team, this read out will highlight key areas where the organization does well, vs areas that need improvement. Often done prior to Phase 1 in the Intentional Culture Framework, this step can be done independently or bundled with other workshops. We'll send out a survey 1 week prior to your event to gather inputs for the discussion.

In person (4 hours)

- Establish Goals for the Day (15 minutes)
- Organization Survey Read Out (60 minutes)
- Specific business area read out (60 minutes)
- Break out session (30 minutes)
- Create high level culture plan (45 minutes)
- Identify next steps and owners (30 minutes)

Virtual (4 hours)

- Establish Goals for the Day (15 minutes)
- Organization Survey Read Out (60 minutes)
- Specific business area read out (60 minutes)
- Break out session (30 minutes)
- Create high level culture plan (45 minutes)
- Identify next steps and owners (30 minutes)



Team Climate

In person (6 hours)

- Establish Goals for the Day (15 minutes)
- Above/below the line (30 minutes)
- Motivators/Demotivators (30 minutes)
- S.A.R.A process (60 minutes)
- 360 read out (60 minutes)
- Strengths and Weaknesses (60 minutes)
- Specific business area read out (60 minutes)
- Develop Team Climate Action Report (30 minutes)
- Identify next steps and owners (15 minutes)

In person (3 hours)

- Establish Goals for the Day (15 minutes)
- S.A.R.A process (45 minutes)
- 360 read out (45 minutes)
- Strengths and Weaknesses (45 minutes)
- Develop Team Climate Action Report (30 minutes)
- Identify next steps and owners (15 minutes)



Interested in more details?

We have many more agenda topics and structured offsite approaches we would be happy to share with you. Please reach out to daniel@velocityadvisorygroup.com or fill out the "Contact Us" for on the site to have someone call you.