

Do We Need an "Offsite" Strategic Planning Retreat?

Presented by
OnStrategy

Do You Need a Retreat?



When to Host a Retreat

- ✓ You need to have a big strategic reset and recast your plan.
- ✓ You need to adapt and react to major shifts in your marketplace.
- ✓ You need some facetime with your team to get re-aligned on what's most important.



When to Avoid an Offsite

- ✗ You've just had a major shift in your organization. IE - Leadership change.
- ✗ You're treating planning as a once-a-year event with no interim reviews or adjustments.
- ✗ You have a quarterly strategic planning or OKR process that already works!

Hosting Your Retreat



Host an In-Person Retreat

- ✓ Hosted over 2 dedicated days at an offsite location.
- ✓ Best for teams that need to eliminate daily distractions to focus on planning.



Host a Virtual Retreat

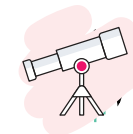
- ✓ Hosted in dedicated 2-hour meetings over several weeks.
- ✓ Best for teams that are geographically disbursed.



Do You Need a Facilitator?

The retreat facilitator will likely be unable to both participate and facilitate the sessions.
[Contact us](#) if you need a facilitator!

What You Should Cover



Where are You Today?

In your retreat, you need to review your competitive market, how you're performing, what's working, and what isn't. In planning terms, this is assessing the current state section of your strategy.



Where Are You Going?

You also need to envision your future, what that future looks like, and how it impacts your organization and community.



How Will You Get There?

You should also cover how to put your plan to work, which includes creating strategic goals, objectives, key results, and the cadence for which you will review and refresh your strategy.