



# Leadership Retreat

## Planning Process



### Kickoff



#### GET ORGANIZED

- ✓ Define roles and responsibilities
- ✓ Align on a project timeline
- ✓ Identify relevant stakeholders
- ✓ Determine retreat participants

1 hr

PARTICIPANTS Client Planning Lead, W&H

### Data Gathering

#### ONE-ON-ONE INTERVIEWS

- ✓ Discover individual motivations, desires, and values
- ✓ Unlock a general "pulse check"
- ✓ Identify areas of alignment or misalignment
- ✓ Uncover strategic priorities for each team member

45 m x10



PARTICIPANTS Client Leadership Team, W&H

### Leadership Alignment Retreat



4-8 hrs

#### EXPERIENCE THE MAGIC

- ✓ Participate in an experience designed and facilitated by W&H
- ✓ Brainstorm, collaborate, synthesize, and align on clear priorities
- ✓ Determine what is not a priority
- ✓ Participate in thoughtfully structured discussion that allows the team to work "on" the business instead of "in" it
- ✓ Agree on next steps and responsibilities
- ✓ Move forward confident in the future of the business

PARTICIPANTS Client Leadership Team, W&H

### Final Touchpoint



#### CHECK IN AND ALIGN

- ✓ Review retreat agenda, including activities, objectives, and timing
- ✓ Confirm design and purpose of material components
- ✓ Identify final changes

1 hr

PARTICIPANTS Client Planning Lead, W&H

### Meeting Design

#### BEHIND THE SCENES

- ✓ Leverage interview findings to develop retreat agenda including activities, objectives, and timing
- ✓ Develop draft versions of relevant material components
- ✓ Move files into design as needed

PARTICIPANTS W&H

### Session Summary



#### FINAL DELIVERABLE

- ✓ Outcomes of the meeting, including collective decision points and next steps
- ✓ Additional recommended next steps
- ✓ W&H thoughts and observations of the team

PARTICIPANTS W&H

**NOTE** The following strategies would expand or reduce scope and budget requirements:

- Additional interviewees during the Data Gathering phase: **+\$300 per interview**
- Changes to meeting design after Final Touchpoint: **fees depend on scope of change**



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