Leadership Retreat

Planning Process

1hr

Kickoff

GET ORGANIZED

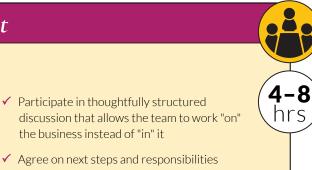
- Define roles and responsibilities
- ✓ Align on a project timeline
- ✓ Identify relevant stakeholders
- Determine retreat participants

PARTICIPANTS Client Planning Lead, W&H

Data Gathering

ONE-ON-ONE INTERVIEWS

- ✓ Discover individual motivations, desires, and values
- **´45** m` x10
- ✓ Unlock a general "pulse check"
- Identify areas of alignment or misalignment
- Uncover strategic priorities for each team member



REPORT

✓ Move forward confident in the future of the business

the business instead of "in" it

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

wolf&heron

PARTICIPANTS Client Leadership Team, W&H

Meeting Design

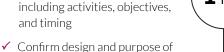
PARTICIPANTS Client Planning Lead, W&H

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

1hr



Leadership Alignment Retreat

EXPERIENCE THE MAGIC

facilitated by W&H

on clear priorities

Final Touchpoint

Review retreat agenda,

material components

Identify final changes

and timing

CHECK IN AND ALIGN

Determine what is not a priority

PARTICIPANTS Client Leadership Team, W&H

Participate in an experience designed and

Brainstorm, collaborate, synthesize, and align

