



Be a **MODERN MANAGER** with a thriving team.

*episode guide*

## EPISODE 149

# Planning a (Virtual) Team Retreat with Seth Linden

Team retreats come in all shapes and sizes. They can range from a few hours to a few days, be on-site, off-site or virtual, be oriented toward business or pleasure. Regardless of the type of retreat you're planning, a thoughtful design will help the time you spend together meaningful.

This guide contains tips and suggestions for designing a team retreat.

## MAKE IT MEANINGFUL

### Determine the Purpose

The first step to planning a team retreat is to clarify why you are holding the retreat. What is it you hope to accomplish? Ask your team what they hope to get out of the retreat as well. This will generate greater enthusiasm for the time away from work and help you plan a more engaging, meaningful agenda.

Here are some example reasons to consider for your retreat:

- Reconnect with and strengthen the bonds among colleagues.
- Have fun / bring more joy and play into our teamwork.
- Have focused time to dive into a big topic e.g. goal setting, strategic planning, annual work planning, new product brainstorm.
- Learn about each other and how we can work together more effectively
- Learn about a topic or issue relevant to our team / industry.
- Strengthen team member loyalty and pride in our work / business.
- Make time to talk about big issues facing our industry, market, customers, etc.



## Identify Opportunities to Make it Feel Special

### **The space**

If you are holding the retreat in person, where will you gather? What type of mood do you want the environment to create? Consider what you can do to the space to help foster the energy and tone you desired. Can you swap out any tables or chairs? Can you bring in flowers?

For virtual retreats, consider whether you want to encourage people to join from their desk or if sitting on a sofa or outside on a deck are options.

### **The dress code**

Typically, the more comfortable the dress, the more relaxed and engaged people will be. Consider whether a casual dress code will help foster or detract from the mood you intend.

### **The goodies**

Whether you are meeting in person or virtually, having special goodies is almost universally appreciated. Food, mugs, and notebooks are commonly enjoyed, but be sure to consider any special dietary restrictions before deciding what to provide.

If meeting virtually, consider sending a gift card head of time for each person to order lunch or snacks that they prefer. You can also send a fun virtual background or icons to print and hold up that have words or saying such as "thumbs up" or "your on mute".

## "Team Building"

There are many ways to 'team build'. Before deciding on a team building activity, ask the following questions to yourself and your team members:

- What is the goal of this team-building time?
- What logistical constraints do we need to manage such as time available, budget, virtual/physical space?
- What accommodations do we need to consider such as physical ability, dietary restrictions, personal comfort and safety?
- What do each of us want to do? What do we individually think is fun/enjoyable?



Activities with an \* can easily be done virtually.

### **"Fun" activities**

These activities focus on creating a positive atmosphere for the group.

Examples:

- private room karaoke
- a theater performance
- bowling
- cheese/wine tasting\*
- a private cooking or mixology class\*
- a private tour of a museum or historical site
- an art or craft project\* such as decorating picture frames

### **Trust-building activities**

These activities are designed for people to work together to develop communication skill and deepen trust.

Examples:

- a ropes course
- capture the flag
- cooperative board games (where you win/lose as a group)
- the marshmallow tower challenge
- a team scavenger hunt

### **Social activities**

These activities center around casual time to enjoy each other's company.

Examples:

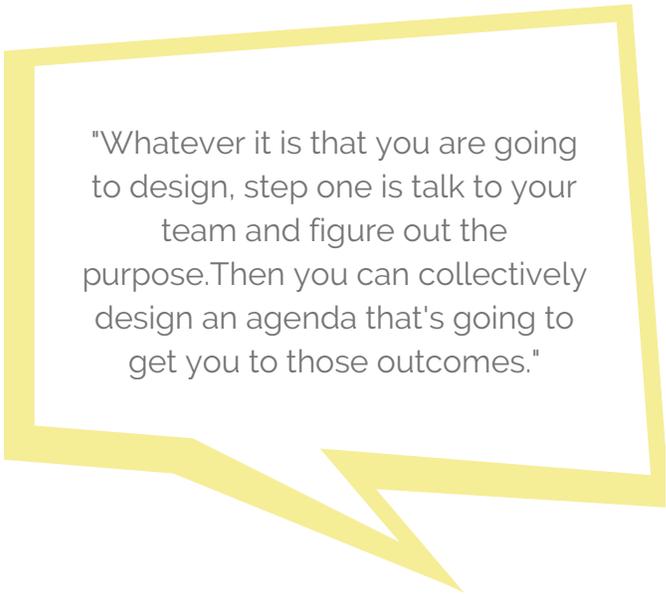
- meals or a potluck
- a picnic or boat ride
- drinks at a bar, lounge or at home\*
- discuss interesting questions\* (search for lists of trust-building questions online)
- The spectrum activity\* (<http://bit.ly/spectrum-activity>)

### **Adventurous activities**

These activities encourage physical movement and a spike in heart rate.

Examples:

- a yoga class
- rock climbing
- trapeze
- run a 5k
- a hike



"Whatever it is that you are going to design, step one is talk to your team and figure out the purpose. Then you can collectively design an agenda that's going to get you to those outcomes."



## PLANNING PRO-TIPS

### Design the Agenda

#### **Think in time blocks and themes first.**

Instead of starting with a laundry list of smaller activities, first think in big chunks of time, like morning, afternoon and evening. Or early morning and late morning. Assign each of these blocks a general theme based on the retreat purpose. Here are a few examples of themes: fun, group learning, relationship building, work/business to be done, relax or free time, meals, etc. Use these themes to help ensure a balanced retreat that touches on all the important components.

#### **Plan the flow.**

As you begin to fill in the time blocks, consider the overall flow of the day, the mood people will likely be in, and how the timing of a topic fits with other topics. Consider how you can transition from one topic to the next so the energy and momentum builds over the course of the retreat.

#### **Incorporate movement and breaks into the day.**

It's hard to sit still for hours at a time. Incorporate movement such as stretches or walk-and-talks in addition to traditional breaks. Schedule breaks every 1.5-2 hours for a minimum of 10 minutes. For full day retreats, longer breaks of 15, 20, and 30 minutes can help keep people focused by giving them plenty of time to take care of physical needs and check email, etc.

#### **Treat each session like it's own meeting.**

Design each session with it's own purpose and agenda. Consider the topics, activities, and timing. What tools, resources or technology will you need. How will you engage people using small group conversations, stick-note activities, etc? How much time will you spend on each topic? The more prepared you are, the easier it will be to facilitate.

#### **Thoughtfully open and close.**

How you start and end the day are critical to setting the tone as you enter the retreat and return back to normal work. Start by sharing what you hope to get out of the retreat and the values and norms you expect the group to uphold. As you end, encourage time for reflection so people can walk away with something meaningful, positive and/or action oriented.