

L&D's Role in Leading Off-Sites

Preethi Anand



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The world we live and work in is going through unprecedented changes at a pace that needs us to sprint just to stay in place.

A few businesses are leading these changes; many others are forced to adapt to the changes; while still others are focusing their efforts on building an agile organization to better manage the future. Interestingly, diverse groups within an organization—including operations, marketing, strategy, quality control, HR, and L&D—have some role to play in developing solutions for the organizational challenges we're facing today.

The million-dollar question often is “Which department or function is responsible for this project?” The lines between the functions—whether L&D, talent development, or HR—begin to blur. Fortunately, business leaders are increasingly inviting L&D leaders into the conversations about these strategic gray zones around responsibility.

One of the areas in which the L&D function has traditionally taken the lead is the leadership off-site. Part of the challenge is there isn't

one common or shared definition for the management or leadership off-site, because every off-site is different. If I were to describe an off-site to an L&D intern, I would say that these are meetings that a leadership team instigates for a common purpose and that occur away from the workplace. I would remind the intern of Albert Einstein's popular quote, "We can't solve problems by using the same kind of thinking we used when we created them." Einstein's words explain the underlying philosophy of every off-site: You need to get people away from their everyday routine to enable them to see things differently. This is likely the only common factor among all off-sites.

In this issue of *TD at Work*, I will:

- introduce those new to the subject to off-sites and how to lead one
- help veteran off-site designers step back from their routine and rethink off-sites, looking at them through a business lens.

Business Expectations From an Off-Site

Let's start with the question that precedes all others: Who is your customer or client? I'm no mind reader, but I can see you scoff with an obvious, "Of course it's the business team that asked us to plan the event." You may be right.

The question, however, is more important than the straightforward answer. As L&D professionals, we create a solution for the specific business team that has contracted with us, but in reality, our end customer is the organization as a whole. In marketing terms, this is like business-to-business servicing: You service the business teams so that they can support the organization in realizing its mission. And while this is true of all L&D initiatives, it is an especially important aspect of off-site meeting planning. We must ensure that we design an off-site that aligns with the organization's *raison d'être*—its vision and strategy.

A common statement you will hear from any business unit that requests an off-site is that its function is different from others in the company. That may be correct, but most often that isn't the case. When you put the organization first, you will know your overarching priority. And knowing who your primary customer is will make all the difference to the design.

Leadership off-sites are not always for the C-suite; they could be intended for the functional heads under an executive, a cross-functional team, or a team of managers. In such cases, it becomes even more important to have the company's strategic priorities in mind when identifying the team's common purpose and the purpose for the off-site.

Let's look more closely at the types of off-sites and what a company may expect from the meeting.

Knowing who your primary customer is will make all the difference to the off-site design.

Three Types of Off-Sites

As previously mentioned, off-sites are events typically for upper management or leaders that are held away from the office and the day-to-day business. But not all off-sites are the same. There are three common types: the retreat, the planning commission, and the resolution mission. The L&D team plays a role in each, including potentially redirecting the requesting team to hone in on its purpose.

The Retreat

This is by far the most common (and unpopular) kind of off-site. The intent is to take a leadership team away from work so individuals can informally connect with each other and unwind. Because L&D professionals are good at engaging groups of employees with training games, business teams will reach out to us to help them develop a good structure for the retreat. L&D professionals view the retreat off-site differently, with many believing we should refrain from being involved in them. Before you form an opinion, explore the intent.

The retreat, despite many customers making it sound like a vacation on the beaches of Hawaii with a mai tai, is intended to bring leaders together and help them build meaningful connections with their peers. These connections are often stronger when forged in an informal

setting—that is, personal, not professional. Many challenges in today's organizations can be solved when business teams decide to talk to each other with their guards lowered, thinking about overarching organizational goals and not their function's goals nor their personal differences. It is for this reason that many times retreats are organized when there are new members in the leadership team.

It is easier to think of this retreat as a learning initiative where we are not teaching team building to a group of leaders but facilitating them working together as a team. For that reason, this type of off-site is not as frivolous as it sounds. L&D's role is often that of an alchemist who brings together different elements and executes the recipe (in this case, a plan) to influence team dynamics and leadership outlook and bring teams closer to business success.

The Planning Commission

The second most common off-site is the planning off-site. This is frequently an annual exercise where the leadership

team comes together to discuss how to move its teams or the organization forward. Some companies likewise run quarterly and biannual planning off-sites. These types of gatherings are of strategic significance to teams. With ways of working and running businesses changing, the ways of approaching strategic plans have and are continuing to change. As such, business teams are increasingly likely to approach L&D to facilitate the planning process for them.

If you listen to retired corporate leaders talk about planning sessions they have seen, they will tell stories about the all-knowing CEO who creates the plan for the organization, with every function then designing its plans based on the CEO's. Or take the example of planning sessions from more progressive companies, where a star employee designs a smart plan for the business that the CEO tests for a year, loves, and then probably rewards the employee for the effort.

Both plans are good models that worked in the past. However, given today's reality, organizations have an urgent need to reinvent themselves and cannot place their bets on one idea or one person (their competition would figuratively eat them up). We need crazy, workable ideas that set our companies apart and are at least two months ahead of their time. Today, the strategic planning process is crowdsourced, featuring more diverse perspectives from multiple or all organizational quarters.

The beauty of running a planning commission off-site is the unique role the L&D leaders play. We may not know the organization as well as the business leaders do, the market context for the planning exercise, or what an ideal outcome of the meeting looks like. Rather, our role is all about managing the process. For example, many companies are now using design thinking as the process that facilitates planning off-sites, and L&D practitioners—with our experience in design thinking—are charged with facilitating the process. Our role is often that of a catalyst: We drive the process and direct the leadership team toward its common goal without participating in or contributing to the discussion.

When discussing planning commission off-sites, business teams may approach L&D for a planning session just because it is that time of the year. The problem with such requests is that there isn't a clear need for such an event

Common Misconceptions and Misses

Here are common misconceptions about off-sites:

- They are get-togethers for business teams.
- An off-site only lasts for a day or, at most, two.
- Off-sites need to either be fun or be fun and teach a moral—preferably the latter.
- Team-building games have a crucial role to play.
- When you are contracted for an off-site, start with the off-site's theme and immediately propose solutions or a format for the problem the team wants to address.
- An off-site designed for a team in the United States would make perfect sense for a different team elsewhere around the world.
- Ninety percent of the planning involves logistics, such as the meal menus.

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