

shift.



focus.



evolve.



Control your future with **STRATEGIES**

At Strategies, Inc., we are not just "flip-charters" - we are **strategic, provocative, directive facilitators** that scope the issues to be addressed, prepare the meetings and the logistics, run the sessions, debrief the participants, and then ensure follow-up and accountability. Each offsite retreat is unique and customized. While each offsite truly is unique below are suggested retreat themes.

Vision & Strategy Development

Sometimes planning is about charting a course for the future, and other times it's about shifting and adapting to the challenges of today. With strategic planning, Strategies helps you understand your current state, clarify your vision and goals, identify potential hurdles and develop viable pathways to the future you envision. The outcome of the retreat is a delineated plan with clear objectives and initiatives that's not only built specifically for your company's needs and expectations, but also explicitly details guidelines for accountability and bottom-line success. Steps in vision and strategy development include:

- Vision that will guide plans and actions
- Strategic focus and direction for plan
- Plan specifics with clear objectives and initiatives
- Organizational accountability

Team Cohesiveness & Effectiveness

This retreat program is highly effective in providing an understanding of the attributes which make teams effective while gaining valuable insight in how to harvest those attributes from your team. Some common topics are:

- Clear organizational roles
- Evolution of your corporate structure
- Increased effectiveness of your executive team
- Improved organizational processes
- Use of meetings as effective business tools

Right Brain Thinking & Innovation

Most positions in traditional business require us to use our "left brain function" day in and day out to be effective in our ongoing responsibilities, but there is tremendous value in bringing "right brain perspective" to our thinking to ensure that we are remaining innovative and relevant in a fast changing business climate. Objectives of the offsite include:

- Understand the differences between right and left brain thinking and the value that each brings
- Learn about the value of innovation and the role of innovation and utilize techniques for identifying potential innovation for your company
- Learn from examples set by other companies
- Learn how to recognize and develop right brain thinking

Rowing in the Same Direction (Gaining Organizational Alignment)

Identify how well aligned the leadership team is (or is not). And, determine how to take advantage of the areas where the team is aligned and what to do about the areas where alignment is absent or uncertain.

Family Retreats

Customized retreats based on the depth of the opportunities and issues to be addressed, the urgency and importance of decisions to be made, and the value of pulling family business members together to share forward-looking thinking. The offsite retreat includes both serious and fun activities for family members. The activities, discussions, and exercises bring the family together to discuss the critical issues facing the business and teach ways for all to work together to achieve business goals and family harmony.

Succession Planning Retreat

Many business owners delay or avoid developing their succession and exit strategies given the complications, personal considerations and angst that arise when just thinking about them. However, when succession is left to the whims of fate and chance, the business and the family can get burned from actions and inactions prompted by the heat of emotion. Succession planning is an important part of a holistic approach to value creation, liquidity and legacy planning. In this retreat, we will:

- Explore the complexity associated with family business succession planning and why it is so difficult to do well
- Provide a detailed process and the "must haves" of successful succession planning
- Provide a rational way to think about a complex, non-rational and emotion-filled process
- And, provide a catalyst to begin the lengthy succession planning process

Please call or e-mail to discuss your offsite retreat needs.