



Simply The Best Results' **Retreat Planning Check List®**

Organizational Review/Assessment for Retreat Planning

1. Which of the following situations or challenges are present in your organization? (Check all that apply to help you gain clarity and focus.)

- Employee gossip or bickering
- Finger pointing or blame (he said, she said)
- Productivity lower than desired
- Employee or manager complaints
- Customer complaints
- Cross-departmental accusations or frustration
- Employee turnover higher than 3%
- A general feeling of tension in the work atmosphere
- Breakdown of communication, misunderstandings, or information not shared
- Manager or employee behavior not congruent with company values or image
- Financial goals not being met
- Sales dropping off from past year or current year projections
- Employees not getting along well
- A general feeling of ho hum-ness among employees or managers
- Other: _____

2. How much are these issues costing your company each month? _____

3. If you allowed these issues to continue over the next 3 months, what could it cost you?
Financially _____ Emotionally/Stress-wise _____

4. Over the next 6 months, what would it cost you in lost revenues/sales or missed opportunities? _____

5. If you were able to resolve one or more of the current challenges, what would it allow you or your organization to accomplish that is not being accomplished now?

Retreat Goals

6. What results would you like to receive from having your team attend a retreat? (Check all that apply)

- Solve a problem shared by the group. What problem? _____
- Work together to implement a change smoothly and successfully
- Develop a new product or service
- Identify ways to expand your company's market share
- Explore ways to expand your company's geographic reach



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- Identify ways to increase profitability
- Improve systems. Which systems? _____
- Improve customer service
- Strengthen trust between managers or among employees
- Introduce/reinforce company vision, mission, and/or values
- Get everyone working toward a singular goal
- Plan the implementation of a project
- Focus on a quarterly push for revenues
- Improve communication across departments
- Enhance leadership skills
- Fire-up the sales team
- Strategize an annual plan
- Have fun together

7. What are the top two goals you would like to address in a retreat setting?

Logistics

8. Who should attend? Executives Managers Supervisors Employees Selected Individuals
9. How many participants would you like to include? _____
10. Length of the retreat? Half-day Full-day Two-days Two-day Stay-Over-Night
11. What is your preferred setting?
 Hotel meeting room Country club Commercial event center
 Resort An unusual setting Do you have a location in mind?
12. What day or days of the week work best for your team to be away from the office? (Indicate your 1st and 2nd choice.)
 Monday Tuesday Wednesday Thursday Friday Saturday
13. How will food and beverage needs be handled for the retreat? _____
14. How will you structure the retreat agenda in order to reach your goals? _____
15. Do any of your team members possess physical limitations that need to be considered when thinking about activities or location? No/Yes. If said yes, what and who do you need to keep in mind? _____