



A WORKING TOOLKIT FOR EXECUTIVE OFFSITES

The Executive Retreat Planning Kit

Fill it in. Hand it to your facilitator. Walk in ready.

Someone said “find us a facilitator,” and now it's your job. Whether the CEO wants the leadership team aligned before the fiscal year resets, a merger just closed, or last year's offsite produced a deck nobody has opened since – this kit gives you the five tools to plan a retreat that produces decisions, not a binder.

INSIDE THIS KIT



5 Retreat Objective Templates

Pick the retreat that matches your trigger



10-Question Vetting Guide

Separate pros from flip-chart amateurs



The 6 Ps Briefing Worksheet

Hand your facilitator a sharp brief



The “Does It Stick?” Tracker

Make the work outlast the offsite



Facilitator Budget Benchmark

Know what to spend – and why

The venue is the easy part.

You're not staring at a blank page because you're disorganized. You're staring at it because nobody told you what the agenda needs to be, how to vet a facilitator, what to ask, what to budget, or how to make sure the work actually sticks after everyone flies home. This isn't a nice-to-have anymore. Companies now run an average of 2.6 offsite events a year, up from 2.4 before the pandemic, and most report their offsite budgets grew year over year.¹ The category itself is expanding fast — the global corporate retreats market is projected to grow from \$31.8B in 2024 to \$73.7B by 2034.² More money, more often, higher expectations — which means the cost of getting it wrong is higher too.

Every tool in this kit is adapted from the methodology Leadership Strategies has used to run thousands of high-stakes executive sessions — the same proven approach our network facilitators bring to the room. Use it to plan with confidence: fill in the worksheets, ask the hard questions, define what the agenda needs to be, set up the follow-through. Then, when you're ready to find the right person for your event, we'll match you to a vetted, credentialed facilitator from our network of 200+.

The single most important decision you'll make about your offsite isn't the venue — it's the **facilitator**. Get that one right, and everything else has a chance to work.

2.6

offsite events per year, up from 2.4

\$73.7B

projected market size by 2034

90%

of strategies fail to execute

¹ Emburse, State of Corporate Offsites 2025 — emburse.com

² Allied Market Research, Corporate Retreats Market — alliedmarketresearch.com

The 5 Objective Templates

Most retreats fail before anyone books a room — because nobody defined what the retreat is *for*. “Team building” is not an objective; it's a hope. Below are the five most common executive retreat types, what each is really trying to produce, and a sample agenda skeleton. Find the one that matches your trigger event, check it, and hand it to your facilitator as a starting point.

01 Strategic Planning

Leave with a written plan — direction, specific priorities, measurable objectives, and an accountability structure — not just a vision conversation.

AGENDA SKELETON

- ☐ Assess where we are; secure buy-in
- ☐ Set the broad direction: mission, vision, values
- ☐ Define strategic outcomes: goals, SMART objectives
- ☐ Establish the implementation plan: strategies, priorities, action plans
- ☐ Define the monitoring plan: the key to ongoing success
- ☐ Close with clear ownership — who, what, by when

02 Team Alignment

Move from “we think we're aligned” to documented agreement on direction, roles, and what won't be revisited.

AGENDA SKELETON

- ☐ Surface the real issues (from pre-work)
- ☐ Establish ground rules for honest dialogue
- ☐ Work the top 2–3 issues to resolution
- ☐ Capture decisions, owners, next steps
- ☐ Confirm alignment out loud

03 Leadership Development

Build specific leadership capability and a plan to apply it — not a feel-good workshop that evaporates by Monday.

AGENDA SKELETON

- ☐ Frame the real leadership challenge
- ☐ Deliver interactive skills content
- ☐ Provide practice and feedback opportunities
- ☐ Set plan for application and reinforcement
- ☐ Define quarterly progress review

Why the objective matters more than the agenda: aligned organizations grow **2.4× faster** and are **2× more profitable** than misaligned peers. The objective you pick here is what your facilitator aligns the room around — the difference between a good conversation and a measurable result.³

³ Forrester, Customer-Obsessed Growth Engine alignment research, 2023 — [forrester.com](https://www.forrester.com)

Objective Templates, continued

04 Post-Merger Integration

Turn two leadership teams into one, with shared priorities and a clear operating model – fast.

AGENDA SKELETON

- ☐ Align on mission, vision, values
- ☐ Confirm strategies and priorities
- ☐ Resolve highest-friction decisions in the room
- ☐ Assign integration owners and timelines
- ☐ Set a 90-day check-in cadence

05 Culture Reset

Convert a survey result or culture concern into visible, leadership-owned behavior change.

AGENDA SKELETON

- ☐ Confront the data without defensiveness
- ☐ Identify the 2–3 behaviors that must change at the top
- ☐ Define what those behaviors look like in practice
- ☐ Commit to leadership actions, owned by name
- ☐ Decide how the org will see and measure the change

Not sure which one?

Start from the trigger, not the format. Ask what has to be different on Monday morning because we met:

New fiscal year or strategy shift → Strategic Planning

Friction or unspoken tension → Team Alignment

Leaders need to grow → Leadership Development

A deal just closed → Post-Merger Integration

A survey or culture signal → Culture Reset

Adapted from the Drivers Model – Leadership Strategies' proven strategic-planning methodology. The objective and agenda you pick here become the backbone of the brief in Tool 3.

The 10-Question Vetting Guide

When an inexperienced facilitator runs a high-stakes session, the cost isn't the fee — it's the wasted year. So vet hard. These questions are adapted from *Interviewing the Sponsor: 14 Critical Questions*, the framework our facilitators use to scope an engagement. The right answers tell you who designs for results — and who just shows up with a flip chart.

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|--|---|
| <p>1 How do you prepare for the retreat?
Listen for stakeholder interviews, a pre-work survey, an objectives call.</p> | <p>6 What happens in the 90 days after the retreat?
The best facilitators design for follow-through.</p> |
| <p>2 How do you move a group from debate to decision?
You want a named method — not “I read the room.”</p> | <p>7 Have you run this exact retreat type before?
Strategic, post-merger, board — ask for the match.</p> |
| <p>3 How do you stay neutral when the CEO is present?
Neutrality is the whole reason to hire outside help.</p> | <p>8 What credentials and training do you hold?
The INIFAC Certified Master Facilitator (CMF) is the profession's highest peer-assessed credential.</p> |
| <p>4 What do we walk away with — specifically?
Decisions, owners, a written plan — not “a good conversation.”</p> | <p>9 Can you share outcomes from a comparable job?
Named results beat generic testimonials.</p> |
| <p>5 How do you handle the dominator, the naysayer, the checked-out?
Managing dysfunction is a skill, not luck.</p> | <p>10 What do you need from us to make this succeed?
A great facilitator asks <i>you</i> hard questions back.</p> |

Why neutrality is non-negotiable.

Psychological safety is the **#1 predictor** of team effectiveness, and high-trust teams perform measurably better. An internal leader can't create that safety when they're also a stakeholder in the outcome — a **neutral facilitator** can. That's the single capability you're vetting for.⁴

⁴ Google Project Aristotle, via ATD — [td.org](https://www.td.org)

The 6 Ps Briefing Worksheet

The most undervalued part of any retreat is the work done *before* it. Fill this in using the 6 Ps of Preparation – the framework Leadership Strategies facilitators use to prepare for every session – and hand it to your matched facilitator before your first call. It cuts your prep time and sharpens their design from day one.

Purpose

Why are we holding this retreat? One sentence.
If you can't write it, you're not ready.

Product

The 3 Hs: What should they have in their hands, head, and heart when the session ends?

Participants

Who's in the room, and what is each person's perspective and stake?

Probable issues

What concerns, tensions, or barriers might surface? Name them now.

Process

How will we get from start to product? Your facilitator designs this – share constraints.

Place

Where, for how long, and what are the logistics?

The “Does It Stick?” Tracker

The most common complaint from veteran executives: “*We’ve done retreats before. They never stick.*” They’re usually right – because nobody built a way to follow through. The fix is structure. This tracker is adapted from the Three-Level Monitoring approach in *The Executive Guide to Facilitating Strategy*.¹⁰ Set it up before everyone leaves the room.

Monthly **Are we doing what we said we'd do?**

- Each owner reports status on their action items
- A simple dashboard – on track, slightly behind, well behind
- The whole team sees it: recognition for wins, peer pressure for slips

Quarterly **Are we getting the results we expected?**

- Review progress against the SMART objectives, not just activity
- Decide what to stop, continue, and start
- Adjust objectives based on what reality taught you

Annually **Did it work, and what's next?**

- Measure outcomes against the original objectives
- Recognize the wins to build momentum
- Reset direction based on outcomes and external factors

ED = RD × CD Effective Decisions = the Right Decision × Commitment to it. A brilliant decision with zero commitment produces zero results – monitoring is how you protect the commitment.

¹⁰ Michael Wilkinson, *The Executive Guide to Facilitating Strategy* (Leadership Strategies Publishing) — leadstrat.com/books

The Facilitator Budget Benchmark

Executives cut the facilitator first because it looks like the optional line item. It's the opposite — it's the variable that decides whether the whole investment pays off. Run the math.

\$3,692

avg. retreat spend per person (21–50 ppl)⁵

~\$36,920

a 10-person team, before facilitation

\$2.5–7.5K

professional facilitator, per day⁶

Published all-in rates run \$16,500 for a two-day session and \$21,500 for three days — typically 15–40% of the total retreat cost.⁷ Now weigh it against the downside. A retreat that produces no follow-through doesn't just waste that \$37K — it costs you the reset, the executive cynicism, and a year of drift. And drift is the norm: up to 90% of organizations fail to execute their strategy, with HBR putting the failure rate at 67%.⁸

The real number executives miss.

61% of senior leaders say the time spent making decisions is largely ineffective — a productivity drain worth an estimated **\$250M a year** in wages for a typical Fortune 500. Strategic misalignment can quietly cost **5–10% of annual revenue**. A skilled facilitator's entire job is to move your offsite to the right side of those odds.⁹

⁵ RetreatsAndVenues, 2025 — retreatsandvenues.com

⁶ Scott Steinberg / Futurists Speakers, 2024 — futuristsspeakers.com

⁷ SME Strategy — smestrategy.net

⁸ Balanced Scorecard Institute, 2024 — balancedscorecard.org

⁹ McKinsey, Decision making in the age of urgency — mckinsey.com



YOU DON'T HAVE TO DO THIS ALONE

Now find the person who runs the room.

You have the tools to plan a retreat that produces real decisions and makes them stick. The last piece is the facilitator. FindaFacilitator.com connects you with vetted, credentialed retreat facilitators — matched to your goals, your group, and your timeline. You don't search a database and hope. Tell our Client Executive what you're trying to accomplish, and we present facilitators ready to do the work.

Get matched with your facilitator →



Scan to start

One conversation. The right facilitator. Results that outlast the retreat.

Call **1-877-312-4068** · findafacilitator.com

FindAFacilitator.com is the facilitator marketplace from Leadership Strategies — the company that has trained over 35,000 people in facilitation skills and run thousands of high-stakes group sessions. The frameworks in this kit are adapted from Leadership Strategies' published methodology, including *The Drivers Model*, *The Secrets of Facilitation*, and *The Executive Guide to Facilitating Strategy*.



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