



[caption: In CordeValle in the Bay Area, Calif.]

Meeting is Believing: *Being Together 'Apart' in the New Offsite*

THE OFFSITE IS A FALL TRADITION at many organizations, but especially important when you're the new CEO. While Zoom (and Teams) have laid bare the limitations of meeting virtually, I was determined — despite COVID-19 — to gather together our senior leaders this October.

Being in sunny California, it was easy to hold the meeting outdoors. We spaced tables six feet apart, wore masks, had plenty of hand sanitizer and required everyone to test negative for COVID the day before the meeting. All meals were also held outside. No one joined online.

Planning for the new year

The key purpose of the meeting was to set key goals for the next year and shift certain priorities — something that's difficult to do in the day-to-day rush of work. I've often believed that people need 'space' to think about new, bold ideas. As we also had a number of new people who have joined the leadership team since my arrival four months ago, the meeting served the dual purpose of allowing for in-person interaction between newcomers and the existing leadership team. For us, we soon realized our reconfigured offsite provided new benefits of focused planning and increased camaraderie.



What's Your P.Q. – 'Personality Quotient'?

Despite our social distancing, being together made for a lot of interaction. We had a fun personality assessment as an icebreaker at the start of the meeting meant to be a collaboration exercise. The better you know each other's personality, the better you can understand group dynamics. The four personalities that typically evolve are:

- Driver - dynamic and in control
- Analytical - data driven
- Amiable – adaptable and friendly
- Expressive – talkative and passionate

Among 16 people, we ended up with 90 percent being drivers – not unusual for senior leadership. When you have newcomers and an existing leadership team, it's good for both sides to know the different personality styles so they can all work better together.

Getting down to work, we designed the two-day meeting around our three growth pillars: customer engagement, products and sales. A healthy tension is built into the structure of these three to drive accountability and productivity. In turn, our meeting gave a voice to all three pillars' operating plans to help us get aligned on goals, priorities and timelines for the next fiscal year. Rarely, in re-occurring meetings, do people step back and think big picture.

Emphasize post-offsite work – and results

In order to assess our leaders' belief in our ability to execute on our goals, we did a survey both at the start and end of the meeting. It turns out these key beliefs moved up by 30 percent. A remarkable rise in so short a time. Call it "The Offsite Bounce"?

When offsites are over, people rush back to catch up with work, and get caught up in their day-to-day commitments. So how are we going to put what was discussed into practice and move it forward? We're making action plans that are specific and accountable, with dates and names to stay front and center long after the offsite.

Meeting in person as a team helped us accomplish what we set out to do:

- 1) build team cohesion;
- 2) align on common goals and priorities; and
- 3) create a winning spirit

In summary (but also looking ahead), radically rethinking your offsite during COVID-19 takes some remodeling and a good deal of preparedness. But what we've already found in the follow-up is that building teams anew helps build results – and, we trust, long beyond any pandemic.