

Offsite Meeting Facilitation

Options for Change

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Options for Change Background

- Founded in 1980 – designed courses for change leaders and teams
- Intellectual property based on the best of systems thinking, change management, family systems and organizational development
- Over 600 pages of proprietary strategic and tactical tools and training on the web for
 - Culture change
 - Change management
 - Executive coaching
 - Team development
- OFC has worked with over 500 companies and 1000 teams

Sample Client List



GLOBAL KNOWLEDGE NETWORK



Engineering the flow of communication™



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Reasons to Have an Offsite

- Develop and align a group to the vision
- Build a cohesive, high-performing team
- Kickoff a reorganization or change initiative
- Define and review business goals
- Develop or implement a new strategy
- Identify and solve common business barriers
- Resolve stakeholder or customer issues
- Have fun

The Process

- Define the overall goal with management
- Interview participants on their needs
- Draft an agenda
- Refine the agenda with an in-house design team and management
- Distribute the agenda with any prework
- Facilitate the offsite
- Produce notes or minutes
- Evaluate the process and the results

Example 1 – Business Barriers

- Identify the business barriers – either in interviews, focus groups, or at the offsite
- Discuss and prioritize which ones to tackle first
 - Use various analysis tools, such as the *Opportunities Assessment Matrix*
- Set up task forces to address the top issues
- Task forces meet and develop recommendations
- Task forces report out and group adopts action plan
- Task forces finish their work after the offsite
- Group reconvenes to review the results

Example 2 – High-Performing Team

- Complete the *Team Process Check* to identify its Team Traps
- Ensure the team is clear on its *Core Purpose*
- Reach consensus on *Rules of Engagement*
- Adopt a decision making process, such as *Diverge-Converge* or *Quick Closure*
- Choose a conflict resolution method, such as the “*24-Hour*” Rule
- Identify an accountability tool, such as *Giving Feedback*
- Select an evaluation tool, such as *Quick Check*

Example 3 – Stakeholder Relationships

- Identify the business goal you are trying to reach
- Use the *4 Culture Types* to analyze the organizational culture
- Map key stakeholder groups using *Structural Mapping*
- Identify important clashes, problematic relationships and coalitions
- Assess the business impact for each of the above
- Develop a corrective action plan to improve the most crucial relationships

Our Specialty Is...

- Intervening at critical developmental moments
- Building trust and encouraging risk-taking
- Teaching a group to self-manage and develop leadership
- Overcoming resistance and achieving buy-in
- Breaking deadlocks and reaching decisions
- Holding members accountable and confronting problem behavior
- Resolving conflict, even deep and longstanding