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Conducting Successful Strategy Retreats

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"Mustapha is an outstanding Board Trainer and Strategic Planning facilitator. He is an inspirational trainer and indeed one of the best." *Dr. Tonny Tumwestgaye, Executive Director, Uganda Protestant Medical Bureau.*

About the Author
Mustapha Bernabas Mugisa, M.Strategy

Mugisa is a personal and organization transformation specialist recognized for providing value-based consulting to professionals and corporate entities. He is a prolific speaker on the topics of strategy, risk, and cybersecurity. He is a Certified Public Accountant (CPA) and Certified Fraud Examiner (CFE). A holder of Master of Business Administration (MBA) of Makerere University, technology enthusiast and cybersecurity researcher, Mustapha completed among the top three candidates in Uganda with the highest marks at the Association of Chartered Certified Accountants (ACCA) final exams.

He has served on several boards including Technical Advisor on the Board of Directors of Uganda Red Cross Society, Uganda's largest indigenous humanitarian organization, as well as on the Board of Reach Out Mbarwa, a Community Faith-Based Non-Government Organization (NGO).

His speaking involves making over 15 keynote speeches a year at major conferences and business events. He is a great Board Trainer on the role of the board in Risk, Strategy, and Board Processes. He can be reached for your next Board Training and/or Induction.

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CONDUCTING SUCCESSFUL STRATEGY RETREATS

A strategic retreat offers an opportunity for the team to gain insights into the thinking of the top leadership of the business. Crafting a strategy takes longer – many strategy formulation tasks I have facilitated have lasted three to eight months – depending on company size and top leadership ownership of the strategy process. A great strategy retreat acts as a good consensus forum for the strategy planning process. It helps clarify the strategy planning process, the required support and role distribution. Thereafter, a strategy process launch to all staff becomes natural as key strategy champions know their roles in the journey and the kind of support they need from different staff throughout the company.

As Mr Strategy, my advice to the chief executive and the senior people, is not about documenting a strategic plan. Rather, it is an opportunity for the team to relax, bond and soul search. You go to an offsite to examine the appropriateness of the current business model, the new trends, the emerging competition and how to better position to win. Unfortunately, many leaders expect to have concrete strategic choices after a two- or four-day retreat. It is not possible. As a strategy expert, it is my responsibility to manage retreat expectations. That is why we usually issue a pre-retreat questionnaire to clarify on key issues. In addition to specific company questions, we ask the top leaders the following questions:

- a) **Purpose** - Why are we having the retreat? What do we want to achieve? This helps manage offsite retreat expectations. I prefer indoor and outdoor team-building activities that have leadership lessons. For example, the “select your team exercise” deepens team bonding, makes people laugh and teaches people to select people with something they have to offer.
- a) **People** - Who needs to be there? Will everyone important be able to make it? Most times leaders think that the top executive team must be part of the retreat. That is true if the budget is unlimited. However, if you must select the top 10 to 15 people out of over 560 staff in the company, you need to take people who demonstrate strategic alertness. Technology has democratized ideas. In this era where the customer is beyond being king, to a dictator, you need folks who have interface with the customers. For example, a financial institution must have at least two branch representatives – one from the best-performing branch and the other from the most improving one. When it comes to strategy, analysis is critical to improving the quality of the decisions including who to be part of the retreat.
- b) **Place** - Where will it take place? Can we set up the space as we like? As Mr Strategy, I would like to be involved in the venue selection decision. You want a place where people will be relaxed and challenged to think not just outside of the box, but far away from the box. Are snacks and meals sorted? What kind of snacks? Imagine taking your best strategic thinkers to an offsite retreat and the food on the menu is restricted. Someone can only have the fresh juice they want unless they pay out of pocket! Seriously, how do you pay USD 250 per day room rent for your staff, and deny them the flexibility to eat what they want?

- c) **Preparation** - What equipment do we need? Who's bringing and managing the tech stuff? Have you checked out the hotel projector? The flip charts. Who will provide the markers? If you have facilitated several strategic retreats, you know how most flip chart holders are defective. You need permanent markers on flipcharts, but most people bring fake ones. It makes the experience poor. No one brings manila paper and masking tape, yet these are essential in group exercises.
- d) **Proceedings** - Do we need someone from outside to help run things? How will we capture what's discussed? When confronted with this issue, I look the top executive in the eye and ask: why is it that cars are not made in such a way to inhale their exhaust? An external person helps bring an outside perspective to the conversation. They may not be your specific industry expert, but they understand the strategic planning process and how to give voice to each of the team members without any biases.

Planning a successful retreat is like creating a menu for an unforgettable experience. It's a chance for us to step away from the usual hustle, connect, and refocus.

The retreat's agenda must be carefully designed to not only reflect on the company's past achievements and lessons learned but also to forge ahead with innovative strategies that align with our core mission and values. Throughout the retreat engage in dynamic discussions, collaborative workshops, and insightful analysis, all aimed at propelling our organization towards a sustainable and prosperous future.

What to Expect

A review of our current strategic and business plans to understand where we stand and the directions we can take. The retreat is a platform for every voice to be heard, ensuring a collective effort in our strategic planning

process. Dive deep into areas crucial for the business's success, including financial performance, stakeholder engagement strategy, organizational structure, and compliance with relevant laws and acts. Together, we will identify strategic initiatives, set achievable goals, and outline clear action plans with designated responsibilities and timelines.

This retreat is not just about planning; it's about strengthening the team dynamics, understanding the collective aspirations, and committing to a shared vision. Your active participation is key to the success of this retreat and, ultimately, our organization.

Suggested 3-Day Agenda

a) Day 1: Getting to Know Each Other

Morning: Ice-breaking activities and setting the retreat goals.

Afternoon: Team-building exercises.

Evening: Casual dinner and informal chats.

b) Day 2: Diving Deep

Morning: Workshops on key strategic challenges for the business

Afternoon: Group discussions to brainstorm solutions.

Evening: Relaxation time or a fun group activity.

c) Day 3: Wrapping Up

Morning: Action plans and commitment setting.

Afternoon: Reflection session and feedback sharing.

Closing: Summary of the retreat and next steps.

It is important to keep the retreat agenda light to allow for relaxation and channel the brain to serious thinking, team bonding, and rest making the retreat both productive and enjoyable.

Retreat pre-reads checklist.

#	Document Name	Description	Justification	Date Provided
1	Retreat Agenda	Detailed schedule of events, discussions, and activities for the retreat	Ensures participants are aware of the retreat structure and can prepare accordingly	2 weeks before retreat
2	Strategic Goals Overview	Summary of current strategic objectives and their status	Provides a baseline understanding of the organization's strategic focus	2 weeks before retreat
3	Performance Data Report	Analysis of key performance indicators relative to strategic goals	Facilitates informed discussions on areas of success and improvement	2 weeks before retreat
4	Industry Trends Analysis	Overview of relevant trends and forecasts in the organization's sector	Helps contextualize strategic planning within the broader industry landscape	2 weeks before retreat
5	Pre-Retreat Interview Summaries	Compilation of insights and expectations from participant interviews	Informs agenda setting and focuses discussions on participant concerns	1 week before retreat
6	Participant List and Bios	List of retreat participants with brief biographies	Enhances networking and collaboration by familiarizing participants with each other	2 weeks before retreat
7	Logistics Information Packet	Details on venue, transportation, accommodation,	Minimizes confusion and ensures a smooth retreat experience	3 weeks before retreat

#	Document Name	Description	Justification	Date Provided
		and scheduling logistics		
8	Background Reading Materials	Selected readings relevant to the retreat's strategic objectives	Prepares participants for deep dives into strategic discussions	2 weeks before retreat
9	Action Plan Template	Template for outlining strategic initiatives, responsible parties, and timelines	Streamlines the process of converting discussions into actionable strategies	Provided at the retreat
10	Current Strategic and Business Plans	A copy of the current strategic plan and business plan for the current year	Analyses achievements in the current strategic plan and lessons learned, as well as current business model and ideas	2 weeks before retreat
11	Stakeholder Analysis	Stakeholders' analysis and degree of relationship	Understands the interests and influence of key stakeholders and optimizes them for success	2 weeks before retreat
12	Organizational Structure	Current organizational structure	Understands the organizational configuration for success – how is the organization configured to win	2 weeks before retreat
13	Stakeholder Survey Feedback	Stakeholder survey feedback obtained in the last three years	Understands critical stakeholder issues and how to address them moving forward	2 weeks before retreat

#	Document Name	Description	Justification	Date Provided
14	Financial Performance Report	Financial performance for the past five years	Understands cash flow and budget estimates for implementing the new strategy	2 weeks before retreat
15	Vision and NDP Contributions	Key areas in Vision 2040 and NDP III that contribute to	Understands the areas the organization contributes to in Vision 2040 and NDP III	2 weeks before retreat
16	Key Contact Person Details	Specify the key contact person for this engagement; and their contact details like email, phone, and Skype	All inquiries and reports concerning this assignment shall be addressed to the specified contact person	As soon as possible
17	Strategy Assessment Report	Current strategy assessment report if any	Analyzes the current strategy's success, failures, lessons, and recommendations	2 weeks before retreat
18	Key Laws and Acts	Relevant key laws and acts	Ensures compliance with laws and acts	2 weeks before retreat
19	Risk Assessment Reports	Risk assessment reports to the Board for the last 4 council sittings	Understands what key risks stagnating growth at the organization are	2 weeks before retreat

Remember, what you do two weeks before the retreat is more important than what you do during the retreat. If you take people to an offsite without preparing them, you will not have the data to inform your strategic problem definition. Failure to define the strategic problem leads to a wrong strategy.

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To book Mr. Strategy to facilitate at your next strategic retreat, email [sgodfrey\[at\]summitcl\[dot\]com](mailto:sgodfrey@summitcl.com) or use the contact us form at www.summitcl.com.

Are you planning a strategy retreat and need experts to make your retreat a fantastic one, contact Summit Consulting Ltd.



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