



# KEYS TO DEVELOPING HIGH-PERFORMING LEADERS

The Brainpower is in the Organization



**Pinnacle** LTD

LEADERSHIP & TEAM DEVELOPMENT



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# GRAND CIRCLE CORPORATION

## OUR VISION

### (What We Hope To Become)

We will strive to be the world leader in international travel, adventure and discovery for American travelers over 50 - - providing high impact, inter-cultural experiences that help change our travelers' lives.

We will establish this leadership position in the travel industry through application of our direct marketing expertise and the synergies gained from the acquisition of key travel companies.

We will generate a high sales growth and a reasonable profit growth annually for Grand Circle Travel, Overseas Adventure Travel and Grand Circle Cruise Lines. Each year 5% of our after-tax profits will be given to fund the Grand Circle Foundation as a way of giving back to the destinations we visit.

We will strive to be a great company - - providing a workplace that is stimulating, fulfilling and meaningful to our associates; an environment where associates connect to their passions and to each other as we achieve professional and personal goals. All associates will be given the opportunity to maximize their potential in an organization that is supportive of Body, Mind and Heart.

**BODY:** Recognizing our dynamic and stressful environment we will provide opportunities for associates to strengthen, develop and maintain their physical selves.

**MIND:** We will maintain a commitment to life long learning-- to the growth and expansion of our intellectual selves through experiential learning, training and the sharing of experiences with other companies.

**HEART:** We will continue to be a diverse, compassionate organization that supports associates balance between professional and family lives as well as their giving back to our world and community through service.

# MISSION

## (Why We Are In Business)

Grand Circle Corporation is committed to a mission that creates a balance between our responsibilities to our customers, our associates, our stakeholders and our world.

### **ASSOCIATE RESPONSIBILITY:**

We will provide an environment that fosters professional development and encourages personal growth. We will maintain competitive compensation and benefits packages relative to the industry and community. We will conduct business with respect for each individual and their role within the organization.

### **CUSTOMER RESPONSIBILITY:**

Grand Circle Corporation, through direct marketing, is committed to providing active, mature Americans over 50 with the most exciting travel, adventure, and discovery programs in the world at unequaled value. We strive for 100% customer satisfaction.

### **FINANCIAL RESPONSIBILITY:**

We will operate Grand Circle Corporation in a sound financial manner, to create growth, and increase its value.

### **SOCIAL RESPONSIBILITY:**

Global citizenship is central to the success of Grand Circle Corporation. We will commit time, people and funding through the Grand Circle Foundation as a way of giving back to local, national, and global communities in which we live and explore.

## **OUR VALUES (What We Need To Exemplify)**

Our values are the foundation upon which our company is built. They are what our beliefs and actions are derived from. Our values shape our decisions, give direction to our growth, and allow us to measure our progress.

We will strive to operate with the highest level of integrity in all our responsibilities. This means that our individual actions and communications will constantly mirror GCC's Vision, Mission and Values.

### **OPEN AND COURAGEOUS COMMUNICATION:**

Asking for and giving frank, honest and open feedback is critical for all of us to break down barriers, continuously improve at what we do, and drive a successful business. We must each communicate in a direct and candid manner that reflects our true thoughts and convictions. Simply saying the "politically correct" thing or remaining silent is detrimental to this environment and is not acceptable. We believe that recognizing our weaknesses and asking for help is a sign of strength.

### **RISK TAKING:**

We will be asked to move outside of our comfort zones to try things we may not have tried before, and to push ourselves to attempt things we are not sure we can do. We must foster an environment where it is safe to make mistakes. These are important learning experiences that we can build upon. Failure results only when we do not even attempt the well-intended risks, or when we do not learn from the outcomes. Growth will happen when we do.

### **THRIVING IN CHANGE:**

In these times of rapid change, global competition, and high volatility in the travel industry, we must be prepared to change course and move forward. Being well organized may sometimes be less important than moving quickly. The goal is for each of us to maximize our effectiveness, and ultimately our success, in an unpredictable and ever-changing environment.

### **TEAMWORK:**

We believe in small groups of people who work together to create excellent results, solve difficult problems, support each other personally and professionally, and recognize their success. In a fast paced and rapidly changing environment, each member of the team is critical for success. Empowered teams are comprised of people who are committed to taking the necessary actions to assure that the team will reach its goals. Every member must be fully accountable for the team's, and their own personal results.

# **Offsite Business Model**

## **Pinnacle Leadership**

### **SPEED:**

We must be as fast, flexible, and as time competitive as possible to keep us ahead of our competition and be a leader in our industry. We must continuously take our speed to new levels if we are to achieve the aggressive corporate goals we have set.

### **QUALITY:**

Our decisions must be made and actions taken in accordance with high standards of quality and service. Quality can be subjective, and in our business quality often involves a compromise between speed and perfection. When the level of quality required is in question, we will operate to the high standards expected by our customers. Excellence in our quality will continually enhance our repeat business and ultimately our financial performance.

# Offsite Business Model

## Pinnacle Leadership

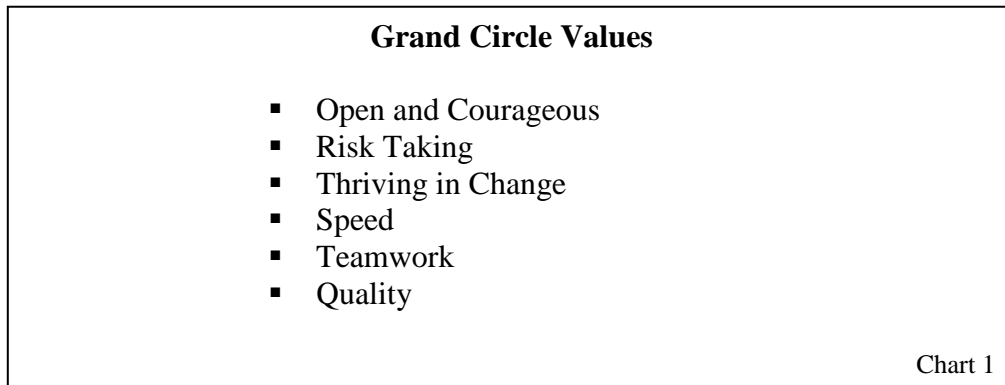
### I. Introduction

Grand Circle strongly believes in leaving the office to solve tough business problems. The GCC Leadership model is:

1. Top People,
2. Top Products,
3. Top Vendors,

with problems solved by Top People.

In the GCC culture, problems are never deflected or ignored, but faced squarely by using action plans that include names and dates. The GCC values (listed in Chart 1) all come together in an offsite, which makes offsites the #1 attribute of the Grand Circle culture and the primary reinforcement of that culture. The goal of every offsite is to move the business and make a big impact, thus offsites are the key to constantly changing and growing the company and developing leadership skills. In a compressed time frame the big issues are surfaced, decisions made, and action plans developed. A well-orchestrated offsite is the secret weapon in the GCC leadership model.



The characteristics of an offsite are listed in Chart 2. Offsites are away from the office so you can break the everyday framework of the team. Incessant interruptions and the normal daily pattern are barriers to gaining a fresh perspective on critical issues. No cell phones or faxes are allowed. You want focus so you can drive new solutions.

## Offsite Business Model

### Pinnacle Leadership

#### Characteristics of an Offsite

1. Away from the daily place of work – more than 30 miles
2. Expose the big issues and make tough decisions
3. Develop the leadership values listed in Chart 1
4. Use an organizational consultant

*Goal of every offsite: Move the business  
Get Team in Alignment*

The purpose of the offsite is to expose the tough issues that constrict the business and then make the tough decisions and action plans necessary to resolve these issues.

All offsites develop the team's leadership skills and reinforce the company values of Open and Courageous, Risk Taking, Thriving in Change, Speed, Teamwork, and Quality. An offsite also provides an opportunity to see if leadership members have adopted these values as their own, which is a key to GCC leadership development.

All offsites should be facilitated by someone trained in the proper facilitator skills and the Grand Circle culture. The facilitator's role is to structure the offsite consistent with the guidelines described in this handbook and to encourage the participants to adhere to the company Values, Leadership Model, and GRIPI (Section X).

If managed properly, an offsite exposes the most critical issues facing the business, forces hard decisions that can make a big impact, helps organize key direct reports to always improve company performance, induces everyone to work together, and requires people to declare – in front of their peers – support for the actions that come out of the meeting. The offsite business model described in this handbook has been developed over thirty years and tested in hundreds of Grand Circle offsites. Using these techniques, you can manage offsites to get months worth of Worldwide planning and progress done in days by surfacing key issues, making decisions, and developing targeted action plans.



# Offsite Business Model

## Pinnacle Leadership

### II. Types of Offsite

The Grand Circle Corporation has made offsites the secret weapon of running the business. They are frequent, structured, and focused on the top issues that will make a big impact on the business. Every offsite is not the same, but they all use the same formula: A formula tested and honed through years of experience.

Chart 3 lists the different locations for Grand Circle uses for offsites. Some are a half-day, others are a week, some are across the street, others are thousands of miles away, some are at the department level, others include only the senior team. Grand Circle has conducted overseas offsites in Portugal, Cuba, Spain, Costa Rica, Morocco, Egypt, and Turkey. The selected site is always someplace small and unique that offers a true flavor for the culture in a different land. But no matter the location or duration, all Grand Circle offsites have the same goal: expose the top business issues and devise solid solutions with clear accountability.

#### Grand Circle Offsites

1. One hour away at Pinnacle Leadership Center (one night minimum, 45 miles from Boston)
2. Across the street at Fire Museum
3. Several miles away at the University Club
4. Two hours away at the Grey Goose (two night minimum)
5. Overseas (in small, unique places close to the customer)

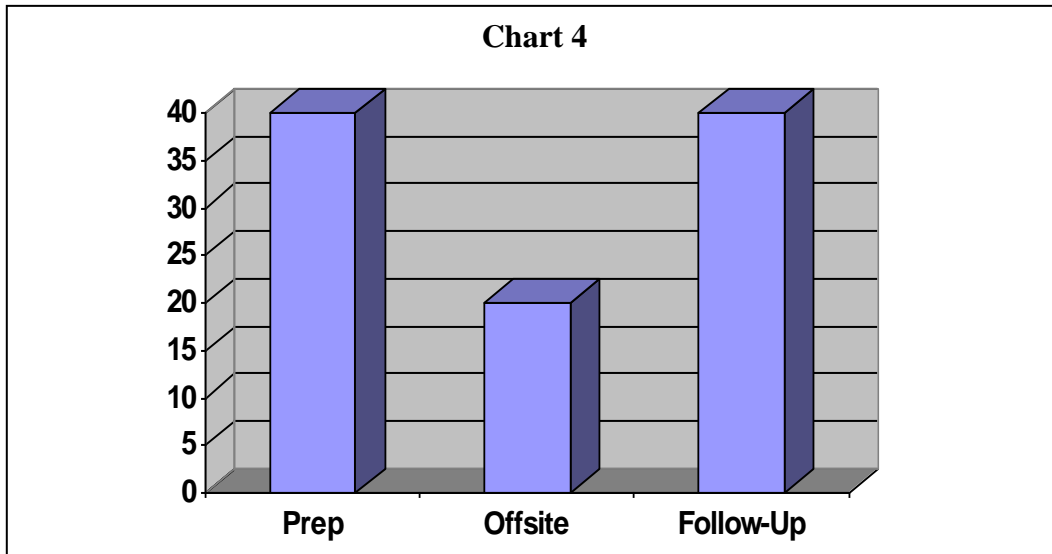
*The more important the offsite agenda – the farther away*

# Offsite Business Model

## Pinnacle Leadership

### III. Offsites are a Process, Not an Event

Offsites are not done all offsite. In fact, Grand Circle considers the offsite to represent only twenty percent of the process. Forty percent is preparation and another forty percent is follow-up actions. Preparation is a minimum 60-90 days and follow-up is 30-60 days. Getting ready for the offsite means doing the necessary homework to focus the offsite on Top Issues and to assure that it is productive. Follow-up is crucial because an offsite is only worth having if you take action upon your return. Beyond Issue Action Plans, follow-up includes a 360-degree feedback for every participant.



The following three sections of this Handbook will explain these three steps and the critical tasks necessary to conduct a powerful offsite.

# Offsite Business Model

## Pinnacle Leadership

### IV. Step 1 - Preparation

Without proper preparation, offsites fail. It is crucial that challenging goals are set, an appropriate agenda is developed, participants are selected with care, appropriate buddy pairs are chosen, a comprehensive workbook is assembled, people complete their pre-work (including study of the workbook), participants roles are defined, logistics are professionally handled, and a follow-up meeting is scheduled in advance.

#### Preparatory Steps

1. Establish goals for offsite and distribute early
2. Create an agenda that will make a major impact on the goals – Focus on Hot Issues & Top People
3. Select participants based on who can contribute toward goals
4. Select buddy pairs – selection critical for Open & Courageous
5. Assemble a workbook of material that addresses Hot Issues – distribute early
6. Assign pre-work (including: More of, Less of, Stop, Start on leader)
7. Define participant roles
8. Plan logistics – Don't start before 9 AM and end by 5 PM
9. Schedule follow-up meeting within two weeks – schedule in advance

*Primary goal is to move the business*

Chart 5

#### Set the Goals

The first and most critical step is setting the goals for the offsite. Why are you having it? What do you expect to accomplish? This is not a light task. You want to focus on the huge, ugly issues. Center the offsite on the changes with the most impact on the business. Usually, these are big organizational changes or major changes in strategic direction. Proper goals for a senior team offsite should be tough because they require gut-wrenching decisions. You did not gather up the best talent in a focused environment to resolve issues that could be dealt with at the office. Put some thought into what needs to change and then select changes that are difficult to pull off. Make these the goals for the offsite: the fewer the better, but never more than five. If the issue is tough enough, a single goal might be appropriate.

# Offsite Business Model

## Pinnacle Leadership

### Early Warning

Distribute the goals and agenda a month in advance. Early notice might cause some apprehension, but you also get weeks of deep thinking by the entire team. The goals should be distributed with an agenda so people know how the days will flow and when an issue will be addressed. The more specific you can make the agenda, the better. Always address the Top Issue first. When the goals and agenda address the huge issues, then this early notice generates enormous energy around preparing for the offsite.

### Hail, Hail, the gang's all here

When you send out the goals and agenda, you need to include a list of the participants. This may seem easy, but it should require some thought. The number of participants should not exceed eight. When you meet, it is critical for full participation by everybody that chairs are arranged no more than seven feet apart. You know what the goals are and you should include anyone who can make a significant contribution. This may mean that you reach down in the organization and include a specialist or two. Senior team meetings that focus on major organization issues or strategic changes are the exception. Here the offsite participants may be kept tighter to focus the team on accountability.

### Matchmaker

The Nominal Process we will describe (Section VII) assumes that breakout teams of two people will analyze the issues and perform the first pass at putting together a recommended action plan. (In large offsites, this might be teams of three or four, but this is considered less than optimal.) Grand Circles calls these two-person teams buddy pairs. The leader is not part of the buddy pairs – ever. Buddies are carefully selected in advance. Pair up people that complement each other because of different experiences or knowledge. Do not pair people who cannot get along. This might seem like a good idea to facilitate teamwork, but experience has shown that the technique seldom works.

### By the Book

Every offsite should be preceded with a workbook distributed a week in advance. The book should include necessary analysis, material from the last time the issue was discussed, last year's numbers, relevant media articles, and anything else that will stimulate thinking. Ideally, the workbook should also include your Mission Statement, Values, organization charts, proposed new organization charts, and pertinent business models. You may think people know these, but inclusion of these items reinforces your practices, values, and mission. Assign sections to different buddy pairs to get them working together prior to departure.

# Offsite Business Model

## Pinnacle Leadership

### Tag, You're it

The buddy pairs start early with specific pre-offsite assignments. They are handed analysis tasks, workbook sections, or other assignments that require them to work together even before they depart for the offsite. They should also prepare a More of, Less of, Start, Stop on critical leaders.

### Staring Role

The list of participants should include each individual's role at the offsite. Someone is the leader, another the facilitator, a timekeeper should be assigned, and others may be given the lead on specific issues. These roles are important because they free the leader up to hear the voice of direct reports. No one goes to an offsite to observe. Everyone participates – 100%

### For want of a nail...

Logistics are a prerequisite. The easiest way to destroy an offsite is to waste people's time, so make sure someone has clear responsibility for logistics. The person in charge of logistics must assure flawless transportation, see the facility first hand, check the meeting room, review the menu, and verify the adequacy of the rooms. Meals should be light, no sugar snacks, and water should always be available. Except for the leader, offsite participants share a room.

### The Secret to Success

Last, but not least important, schedule the follow-up meeting and include the date in the offsite workbook. This sends a signal that the issues to be addressed are serious and that people will be held accountable for assigned tasks.



# Offsite Business Model

## Pinnacle Leadership

### V. Step 2 – Conducting the Offsite

Chart 6 lists the steps used by Grand Circle to conduct an offsite. This may only be twenty percent of the effort, but the offsite itself does provide the linchpin for the entire process.

#### Conducting the Offsite

1. Official offsite starts with the trip – travel together
2. Use nominal process
3. Nature and outdoors critical, never conduct in cramped room – always mix up the settings
4. Record everything on flipchart paper
5. Tackle most difficult issue first – non-discussables
6. Use buddy pairs or small teams for problem solving
7. Require participants to stand and deliver
8. Adjust agenda if necessary to achieve offsite goals

*Make big decisions*

#### Getting There is Half the Fun

Offsites start with the trip to the offsite location and everyone should go and depart as a group. Traveling together reinforces a team approach and builds a healthy tension. Use a van for local offsites. If flights are involved, split up people by buddy pairs, but no one travels alone. Grand Circle uses ‘Hopes & Fears.’ as an icebreaker during the van ride. This exercise helps to adjust the mindset before you arrive. Each participant tells the others what he personally hopes will come from the offsite and what he fears might happen. Sometimes individuals may have an assignment for the van. An example might be to brief the group on a recent visit to a regional office. Work does not consume the entire trip. Plenty of time is allowed for informal conversations to start the process of pulling the group together as a cohesive team.

# **Offsite Business Model**

## **Pinnacle Leadership**

### Use Nominal Process

When the meeting starts at the offsite location, use the nominal process (Section VII) to expose the big issues and to develop action plans. This process has been proven to get an enormous amount of work done in a short period. The nominal process is always done in Buddy Pairs.

### Go Low Tech

Use flip charts exclusively – no PowerPoint. Flip charts are such a simple technology that they do not require a user manual. Everyone can use one, they are portable, easily read, and they encourage creative thinking. When delivering, Buddy Pairs stand together at the flipchart and alternate presenting – this is referred to as Stand & Deliver and is the key reason for using flipcharts instead of more formal presentation techniques. Discussions should always be conducted with Buddy Pairs standing at easel.

Your offsite coordinator should ensure that there is a flip chart and easel for each buddy pair.

### The Elephant in the Corner

Most offsites have three goals. The toughest issue must be dealt with first, especially if it represents a non-discussable. A non-discussable is a big ugly thing that squats in a corner, but nobody wants to talk about it. Frequently, these are top organizational issues – direct reports or colleagues. Tackle this issue first – tackling the Top Issue first is the key to being an outstanding leader. It sends a message that the purpose of the offsite is to make difficult decisions and it encourages open communication.

### Two Heads are Better Than One

A nominal process is used to expose top issues and to select top actions. It has been proven that this process works best with people paired up for assignments. Each individual provides support and stimulus for their partner. Buddy pairs also increase courage because an individual is not required to stand alone. When people explain their thoughts out loud to their partner, it automatically encourages clarity and keeps the focus on the issue. As buddy pairs grapple for consensus, the very short time period strips away all defenses and suddenly new solutions get surfaced. Many may not be realistic, but one or two gems in a days work is a healthy return. Buddy pairs also walk, bunk, travel, and prepare for the offsite together. Using buddy pairs not only accelerates the offsite work, but the process builds common understanding and mutual support back at the office.

# Offsite Business Model

## Pinnacle Leadership

### Why Buddy Pairs

1. Good combinations stimulate creative thinking
2. Increases Open & Courageous and Risk Taking
3. Encourages clarity & focus
4. Dialogue is both with the partner and oneself
5. Creates intense focus on issue – without deflection

Chart 7

### Stand and Deliver

A key element for success at offsites is requiring people to stand and deliver. In a small group offsite, there is no place to hide. At a typical Grand Circle offsite, buddy pairs are sent off with an assignment three to six times a day. Each time both individuals must stand in front of the group and verbally explain their results. This technique places a lot of peer group pressure on the participants and insures continual focus on the issues.

### Stay Flexible

You should never have an offsite without a specific agenda. That said, as the offsite proceeds, new hot issues may emerge or one issue may prove tougher than anticipated. The leader of the offsite must keep an eye on events and adjust the agenda if necessary to resolve the most important issues that affect Top People. Do not get stuck by the agenda. Always remember the overriding goal is to move the business by tackling the largest issue.

# Offsite Business Model

## Pinnacle Leadership

### VI. Step 3 – Follow-Up

Grand Circle offsites are serious business. You want to focus on just a couple of things that can really move the business. Creative ideas are meaningless without execution. You have to take action when you return to the office.

#### Offsite Deliverables

1. Clear identification of the big issues that will move the business
2. List of actions with names and dates – the hardest actions are taken immediately
3. Key in on follow-up dates to insure actions are completed
4. Goal alignment – 90 Day
5. Complete notes of offsite in one business day – from flipcharts
6. Key learnings
7. Make sure there is an aligned message for your return to the workplace
8. Distribute assessments of participants performance

*Follow-up is the most important aspect of any offsite*

Chart 8

#### Clarity Begins at Home

You should return from an offsite with a crystal clear understanding of what issues impede taking your company or operation to the next level. A focused offsite deals with big changes: big changes in organization, products, and vendors. If the return from an offsite is not a little bit scary, then you have probably missed putting together a plan to take real action against the obstacles that stand in your way. Each and every offsite must produce an Action Plan for the next 90-days that includes who, what, and when.

#### Name, Rank, and Serial Number

The most important deliverable is a list of actions with names and dates. When you go through the nominal process steps, actions must emerge. The secret to success is to name the accountable person alongside each action with a completion date. The hardest actions should be done first. Ideally, if they are organizational, the toughest actions should be taken on the first day back in the office. When you get the hard stuff out of the way, the rest is easy.

# **Offsite Business Model**

## **Pinnacle Leadership**

### Synchronize Your Watches

Not only should everyone understand the issues, but every participant should return with their goals aligned with the whole team. Every person will not agree on every issue and action, but the nominal process gives everyone voice and, once decided, each person should transition into execution mode and support the plan. You can deal with tough issues easier when everyone pulls in the same direction.

### Noteworthy

As you conduct the offsite, the participants write everything down on flip charts. Roll these up and have them keyed into a computer within the first few hours of returning to the office. These raw notes should receive only cursory editing because if they are polished, people might assume that their contribution has been tailored by the editors bias. The goal is to distribute the notes by the close of the first business day. If you insist on this goal, there will not be enough time to ‘spin’ the offsite material.

### Old Dogs Can Learn New Tricks

When people return to work, ask them to list their five key learnings from the offsite and distribute them to all participants. This simple task will invariably helps assure goal alignment and reinforces team building.

### Public Address System

Make no mistake, everybody in the company knows you were at an offsite and that you addressed touchy issues. They are impatiently waiting to hear what you decided. Prior to leaving the offsite location, make sure everyone understands the immediate message you want conveyed to the organization. To avoid a demoralized organization, squelch bad rumors immediately and give any bad news as soon as possible.

### You Can't Manage What You Don't Measure

Last, but definitely not least, have each participant rank their own performance and their peers performance at the offsite. The facilitator will help take the interpersonal edge off these assessments. The assessment should be based on the Grand Circle values. Distribute the assessments to all participants. The purpose is to improve the next offsite and to reinforce the offsite culture within the company. When people discover that they will be measured, they stay focused and contribute positively toward the offsite goals.



# Offsite Business Model

## Pinnacle Leadership

### VII. Nominal Process

Nominal process is actually quite simple. Breakout teams of buddy pairs write their top issues on flipchart paper. When the team re-groups, the lists are compared and redundancies eliminated. The Top Issues are the ones with the greatest number of votes by the entire team. The same nominal process is used to come up with the solutions and action sets. Each Top Issue must have a solution and corresponding actions.

Here are the basic steps:

1. An issue is keyed up and discussed as a group
2. Buddy pairs are given an assignment to identify the top three to five issues or barriers. These issues are written on flip chart paper and the names of the buddy pair are listed at the top of the page. This step is only fifteen to thirty minutes because you want the raw truth, not wordsmithing.
3. After the group has re-gathered, each buddy pair stands together and delivers their list.
4. Only clarifying questions are allowed from the group. No judgments.
5. After all the buddy pairs have presented, the facilitator coordinates eliminating redundancies. If you have four buddy pairs, you might end up with 20 issues. After eliminating redundancies, this is usually reduced to less than ten. Prior to eliminating an apparent redundancy, the facilitator should ask the group for concurrence.
6. You need to reduce this number further, so the next step is for everyone to vote for the top three. They vote a three for their top issue, a two for their second and a one for their third priority. The facilitator counts the votes and gets the group to agree these are the top three as determined by the vote.
7. The facilitator leads a short discussion to make sure everyone understands the top three issues.
8. The buddies again pair up with the assignment to list three recommended actions to resolve the top three issues. These actions should include names and dates.
9. The group repeats steps 3-6, except that frequently you narrow the list to the top five actions.
10. After the top five actions are determined, the final step in the nominal process is to verify the assigned name and date for each action. (Names and dates may need to be supplied by the group if not provided by the buddy pairs.)

## **Offsite Business Model**

### **Pinnacle Leadership**

There are many variations of this process and an experienced facilitator will adjust the steps to accomplish the goals. You will notice that everyone participated, everyone had an equal voice, people were held accountable for the quality of their recommendations, decisions were arrived at, and people made commitments to action. Powerful.

# Offsite Business Model

## Pinnacle Leadership

### VIII. Guidelines to Magnify the Effectiveness of Offsites

Effective offsites use a number of techniques and guidelines to encourage creativity, focus attention, and break the office mentality. Chart 7 lists the ‘rules of engagement’ for Grand Circle.

<p style="text-align: center;"><b>Tricks of the Trade</b></p> <ol style="list-style-type: none"><li>1. Trained facilitator</li><li>2. All participants come prepared</li><li>3. Stay true to your company values</li><li>4. <u>No cell phones or contact with office – focused participation</u></li><li>5. Open and courageous communication</li><li>6. Listen</li><li>7. Do it in real time</li><li>8. Call deflection immediately</li><li>9. Follow the Rules</li></ol> <p style="text-align: center;"><i>Committed Participation</i></p> <p style="text-align: right;">Chart 9</p>
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#### A Helping Hand

A common mistake is to not have an trained facilitator, especially for departmental offsites. If an Organization Consultant is not present, then the meeting looks more like an operating/planning meeting rather than a issues oriented offsite. Also, without a trained facilitator, the leader or another participant ends up assuming the role, which takes them out of the meeting.

#### Ready, Set...

Offsites are an expensive use of people’s time and this time should be spent on creative solutions, not getting grounded on issues. Insist that everyone comes thoroughly prepared.

# Offsite Business Model

## Pinnacle Leadership

### Values King

Do not set your company values aside at offsites. People bring offsites behaviors back to the office, so make sure you stay true to your organization's values.

### Hang out a 'Do Not Disturb Sign'

At offsites, you want to break the daily pattern so you can focus on issues. Interruptions from the office destroy a group's concentration. Do not allow cell phones or other contacts with the office. If people behind cannot handle the business, then you need to make that a goal of your next offsite.

### Frankly Speaking

You need wide-open give and take at offsites, unencumbered by political considerations. People are hesitant around 'Open & Courageous' dialogue, especially about nasty issues. You must insist on it: engineer a casual environment, lead by example, and use the nominal process to encourage people to speak their minds.

### Reason to Listen

Listening is a sign of respect. When someone has the floor, everyone else must listen. People should be allowed to have their say without being challenged, but that does not mean one individual can hog the stage. The facilitator might need to gently cut off someone who has dominated the discussion. Additionally, the facilitator and leader should always scan the group and if they spot someone who has lost concentration, they should ask the guilty party a question using their name.

### Seize the Decisive Moment

Make Decisions. Do not delay decisions until you get back to the office because you need better information. Grand Circle makes huge decisions at offsites using what it calls 'directional information.' Do it live – in real time. You already know the relevant directional data and you have your best experts closeted together. Make the decision.

# Offsite Business Model

## Pinnacle Leadership

### Scotty, I need shields...

Everyone has a hefty toolkit they can use to deflect tough issues. This is one of the reasons why big issues are not resolved in the office. The facilitator and leader must have finely tuned antenna and point out deflection immediately.

### Offsite Black & White Rules

Last, remember and follow the rules:

1. No more than 8 participants
2. Schedule between 9 to 5
3. 7 feet apart
4. Nature/Outdoors Critical – Change venues
5. No Cells or PowerPoint
6. Always use Buddies
7. Agenda 1 Month in advance
8. Leaders never part of nominal process
9. Always use flipcharts
10. Stand & deliver in front of flipchart



## Offsite Business Model

### Pinnacle Leadership

## IX. Guidelines to Break the Frame

Commonplace thinking will not move your business. Offsites are designed to break the narrow frame of the office to encourage creative thinking. Chart 10 lists a number of tips on how to engineer an inspiring offsite environment.

### All Work and No Play...

1. Use an unusual place – forest/ocean/river/pond
2. Keep it casual
3. Continually change location and seating
4. Do something physical to break the day
5. If an overnight, have the team plan and prepare a meal
6. Give people quiet time – reflection
7. Engineer a cultural event – Home-hosted dinner, Unique location, hike, swim

*Break the frame*

Chart 10

### Unnatural Acts in Unnatural Places

An unusual place facilitates creativity and new ideas. Earlier, we mentioned that Grand Circle uses a number of different venues for offsites, but the more important the goals, the more effort is made to select an unusual spot. Grand Circle has conducted offsites in Turks and Caicos, Costa Rica, Morocco, Cuba, and more standard cities like Hong Kong, Rome, and Basil Switzerland.

### Easy Does It

A very casual environment stimulates creative synergism. Casual means clothing, facility, and the demeanor of the participants. Try for non-corporate feel and leave the hierarchy back at the office. Avoid the standard configuration with chairs circling a conference table. Despite being in some remote location, this formal atmosphere tells people that office behavior is expected.

# **Offsite Business Model**

## **Pinnacle Leadership**

### Changing Room

Use a facility with multiple rooms and gathering points to provide for breakout teams and to keep the interaction fresh. Constantly shift the room where you meet and go outdoors occasionally. Sitting in the same stale room stifles new thinking. Whenever you change rooms, encourage people to sit next to a new person. Always strive to keep the seating close. Proximity stimulates everybody participating.

### Take a Hike

Grand Circle breaks their offsites with walks, a steam bath, a swim, or other physical activities. Physical breaks should be restricted to activities that do not extend beyond a couple hours. Offsites are intended to move the business, not reward people. The most frequent break is a walk or easy hike because it can be done anywhere by almost anybody. These walks are not devoid of business. Frequently people are paired up and given a subject to discuss on their walk.

### Breaking Bread

Most important Grand Circle offsites include two or three overnights. The entire group should prepare a few meals and clean up afterwards. This simple ritual of preparing and eating a communal meal builds a whole different level of camaraderie. Both the meals and snacks should be healthy. Avoid sugar snacks because they will sap energy after an initial burst.

### Let People Recharge Their Batteries

To boost the group, give people some time alone to reflect and reenergize. Offsites can be tense because they address the huge, ugly issues. Be conscious of the pacing and schedule some down time. It helps to start the day with a period of reflection. After the short quiet period, people can share their thoughts about the prior day's session and their assessment of their own performance.

### Local Flavor

Whenever possible plan an interesting cultural event. In a foreign country, this is easy, but it can be done close to home. At the Grey Goose, Grand Circle frequently starts an offsite morning with a walk down to a local diner for a rural New Hampshire breakfast. Offsites at Kensington include some high-rope team building exercises. The point, again, is to break the standard routine to encourage creativity and problem solving.

# Offsite Business Model

## Pinnacle Leadership

### X. G.R.P.I.

#### Description and Use:

This model provides a framework for diagnosing and improving team effectiveness. The model is hierarchical: start with goals; then allocate work/roles; then identify team processes; and finally, deal with personalities, style and cultural differences to minimize process loss by systematically working through each layer of team development.

#### Goals

CORE MISSION OF TEAM

- Performance Objectives

#### Roles

ALLOCATION OF WORK

- Role Responsibility
- Work Process

#### Process

TEAM PROCESSES

- Decision Making
- Conflict Management
- Problem Solving
- Communication

#### Interpersonal

INTERPERSONAL RELATIONSHIPS  
AND INDIVIDUAL STYLES

---

**Rate your team:** 1 = Too little or to no extent  
5 = To a great extent

#### GOALS:

1. Goals are clear and people are committed to them.

1 2 4 5

#### ROLES & RESPONSIBILITIES:

2. The work is organized in a way which clearly leads to accomplishing the team's goals.

1 2 4 5

3. There is maximum use of the different resources of individuals on the team.

1 2 4 5

4. Everybody is clear on their responsibilities and jobs.

1 2 4 5

5. The leadership is shared.

1 2 4 5

## Offsite Business Model

### Pinnacle Leadership

#### PROCESS:

6. Decisions are based on who has the expertise and best information, not on hierarchy or authority.  
1 2 4 5
7. Conflict on the team is confronted openly and constructively.  
1 2 4 5

#### INTERPERSONAL RELATIONSHIPS:

8. There is trust and openness in communication and relationships. 1 2 4 5
9. Time is taken to examine our process (how we relate to each other, communicate, handle conflict, etc.) to improve the way we work.  
1 2 4 5
10. Flexibility, sensitivity to the needs of others, creativity is encouraged.  
1 2 4 5

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### GRPI PROCESS TOOL

The GRPI model can be used effectively as an assessment tool or as a planning model. Use the GRPI model sequentially, but consider the following ideas to probe the team's thinking and to add depth to the facilitation process.

#### Goals:

- Where they defined, verbalized, and was there buy-in on goals?
- Clarity on goals vs. tasks
- Was the goal clear to all members? How did you know?
- Did the goals change? Why?
- Were goals from previous activities incorporated into these goals?
- Are you a learning team?

#### Roles:

- List all roles (e.g. facilitator/coordinator/leader, timekeeper, process observer, ethics/quality reviewer, etc.)
- Did those roles have clear definition? Did they change? Why?
- Were members satisfied and comfortable in their roles?
- Were strengths and interests recognized and utilized in role acquisition?
- How was leadership being exerted?

## **Offsite Business Model**

### **Pinnacle Leadership**

#### **Process:**

- Was there a process time-flow? Rate the balance of planning vs. implementation time.
- How were decisions made? What were the decision-making models? Was it a deliberate choice?
- Were schedule and agendas used effectively?
- Were multiple alternatives generated before action took place?
- Were adjustments made as the task progressed? Why? How?
- Did the team pause regularly to assess its progress and quality?

#### **Interpersonal:**

- Were all skill sets recognized?
- Was the climate conducive to freedom to express opinions? Did anyone have anything left unsaid at the end? How does the team know?
- Is the team stronger as a team after the task?
- Was there effective listening? Give examples.

# **Offsite Business Model**

## **Pinnacle Leadership**

### **XI. Conclusion**

Offsites are powerful because you have a focused environment where people are judged in the moment and there is no place to hide. Offsites are used to move the business through focused attention and then rigorous execution after return to the business. A secondary goal is teambuilding.

Schedule your offsites early, ideally for the entire year. You can always cancel, but adding dates to busy calendars can be daunting. Plus, a yearlong calendar shows your commitment to building an offsite culture.

One last point: A good offsite can move the business, but an offsite culture will propel Grand Circle toward our vision.

We will strive to be the world leader in international travel, adventure and discovery for American travelers over 50 - - providing high impact, inter-cultural experiences that help change our travelers' lives.