



HOSTING AN

# **UNFORGETTABLE**

# **COMPANY RETREAT**

THE ONLY GUIDE YOU'LL EVER NEED!

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# Introduction

We are in the midst of The Great Resignation and it is keeping executives up at night. So what's the cause? It's a silent killer stalking the halls and cubicles of businesses from coast to coast. It is slowly and steadily sucking the life out of people. It drains their enthusiasm, creativity, productivity and loyalty. And it cannot be treated with lavish bonuses and extravagant perks. Doing so treats the symptom, not the cause. [CALL OUT] The deadly disease is boredom and the symptom is dead people working.

Why this mass exodus from the traditional workplace? It's a reaction to meaningless work, boredom and toxic business environments. As a counteroffensive to The Great Resignation, C-suite leaders who get it, recognize the importance of bringing people together to reconnect, reflect, re-imagine, re-energize, and

**The deadly disease is boredom and the symptom is dead people working.**

resurge into the future. They know that today's (largely millennial) workforce prefers to spend money on experiences, not things. So when it comes to rewards at work, people are hungry for adventures, connection, and making memories; not just conferences followed by cocktails.

Give people an extraordinary experience and guess what? They will re-tell and re-live the experience with their friends, family and co-workers. Talk about instilling some serious FOMO back at the office, this is a gift that keeps on giving. When you are planning your next mid-year meeting or off-site do something different, something memorable to differentiate your employees' experience. Give your people something to brag about and connect around.

Albert Einstein said "Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted." When done right, a great retreat can pay huge dividends. It's priceless.

What happens when you take people to a beautiful place where they turn off auto pilot, shift out of the routine, and eliminate distractions? They have time to think more clearly about the company and their roles in it. To talk and reconnect. To be creative. They have the freedom to “pull over” and consider strategic questions that accelerate product, service, and business model innovation.

We've learned from our own experience that people who travel, seek adventure, and explore new activities are more innovative. Invite people into an adventure and they will grow and advance the long-term success of the business.

When people know the business values them enough to take them off-site, give them a voice, tap their gifts and talents, and invest in them, energy rises and they become more connected and more engaged. This is not insignificant. Depending on which study you read, **it is estimated** that dead people working costs U.S. businesses between \$350 and \$450 billion in lost productivity.

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The uncertainty of the pandemic put a halt on all in-person meetings and company retreats as well and rightly so. But the aftermath suggests people are fed up and in search of more. The big question isn't: “Will people come to meetings and retreats, the more pressing question is where will there be space to accommodate the demand. Hotel executives, consultants, facilitators, and companies such as American Express Business Travel say company retreats are growing rapidly.

# 11 REASONS WHY YOU SHOULD GET AWAY



# Retreat

Consider the word “retreat” for just a moment. It means to get away from the craziness of life, from the numbing of work-as-usual...from the noise of the world. It means to step back, look at things from a different angle and get a fresh, new perspective.

Here are the reasons for doing it:



## 01 Unplug Together

Focus is a powerful thing, but sometimes when you are grinding away in the daily routine of building a new business or shaking up an existing one you develop tunnel vision. You can't see the forest through the trees. This can be dangerous because you develop blind spots, miss opportunities, and overlook fracture lines. Getting away gives people the ability to step out of the details, see the big picture, and ask, “Are we working on the right stuff? Are we working seamlessly or grinding gears? How can we do this with more ease and efficiency?”

We discovered in ourselves, and in the people who come to our retreats, when you turn up the canyon to Sundance it's like a weight gets lifted from your shoulders and you can breathe. Nothing inspires fresh thinking like gathering in a drop-dead gorgeous place. You see problems from different angles. When seen from a new perspective, challenges that seemed insurmountable become more doable. You find solutions you hadn't considered before.



## 02 Relax Together

Perhaps the reason to get away isn't to ask the tough strategic questions, maybe it is simply to come together and relax before or after a season of intense work. Leaders who don't recognize the need to recharge the batteries individually and collectively do so at the risk of burnout. Great sprinters make all kinds of contributions to a company. But if you break down because you never learn to replenish, your long-term contribution will be limited. This is especially important because growing a team and a business is usually a marathon.

Maybe the purpose of the retreat is bringing together a team that works remotely across the nation or around the world. Perhaps, after months of emailing, texting, Slack, and video conferencing they need to get to know each other offline and in-person. Spending three days together sharing war stories of success, strategies that fell flat, and lessons learned requires vulnerability. Genuine, in-person conversation and connection is essential to getting to know one another and forming stronger friendships. It's not therapy, but it can be surprisingly therapeutic.

When you make it fun, a retreat can unleash a lot of creative energy and happiness because people are excited to see each other. Retreats can offer a major rallying point in the year to inspire collective empathy and deeper team appreciation.



## 03 Train Different

The opportunity to grow, expand and get faster, better, smarter rates extremely high on almost every job satisfaction survey. Yes, people want to be paid well and they want to be recognized for their contributions. But research shows employees want ongoing education, skill development, growth and expanded responsibility. At one point in time training meant sitting through a power point seminar or completing homework in a three-ring binder filled with boring training materials. But then, we had to look in the mirror and ask, “How’s that workin for ya?” In most cases it wasn’t.

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Today, people want to be engaged in something that’s meaningful, relevant, and fun. They want to be part of something that challenges them. There are many ways to do this besides a retreat. But take people off-site, challenge them to think creatively, on issues that really matter, then, give them an opportunity to pitch their thoughts and ideas and you’re tapping into our deep seated human desire to contribute and add value. Invite people into extreme adventure experiences that are memorable and exciting. Now, you are doing something that captures their attention and gives them something to talk about.

## 04 Learn What Makes People Tick

When you are going 90-mph with your hair on fire, it's harder to get to know coworkers on a personal level. Pressing the flesh, engaging in face time, and interacting over 2-3 days gives people an opportunity to learn about each other in ways that are limited on Zoom, Teams, and Skype. At our retreats, people gather for wine and cheese on Thursday night and are typically together until Monday morning. Spend that much time together and you are bound to learn things you couldn't back at the office or online. In fact, we've often found that the late evening "chill time" after a day of activities is fertile ground for dialing into each other's personalities and for critical issues to surface.





## 05 Job Sculpting

A retreat can be a good way to check in with individual team members and dig deeper to customize their job experience. Job sculpting is the art of structuring a person's job so that they are doing more of what turns them on and less of what frustrates them. If you can forge a career path that is aligned with a person's deeply embedded life interests they will be happier and more engaged. But this takes time—time for people to identify what their deeply embedded interests are and time for executives to really listen to and understand the needs of people. And, it takes time to sculpt a job that meets the needs of the company as well as the person. If you take away parts of a job a person dislikes, you have to find someone else who is excited about taking them on. Leaders must become both detectives and psychologists. The ones who do this well frequently check-in with people. This is a major reason why they have a strategic competitive advantage in attracting and retaining great talent.

Doing a job you love contributes to your well-being and according to a recent Forbes article, 89 percent of employees at companies with well-being initiatives such as job sculpting are more likely to recommend their company as a great place to work.

While this process might not be completed at a company retreat, getting away is a great way to kick-start these conversations. It gives individuals and teams uninterrupted time to get the ball rolling and “chew” on some really important questions. Here are some questions to launch the discussion:

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- What kind of activities come natural to you? What are you inherently good at?
  - What makes you passionate?
  - What kind of people do you like to work with? What kind of environment?
  - What do you want to get better at?
  - What parts of your job bring you joy and fulfillment?
  - What parts of your job do you find frustrating and draining?
  - If you were doing your dream job, making a significant contribution, what would it entail?

If job sculpting is a way to invest in your team's engagement and wellness, the business results are compelling. The same Forbes article indicated that impassioned people who show up to work every day fully awake and firing on all cylinders contribute 21 percent more profitability for the company. People who feel seen and heard, because you check-in with them frequently, are 4.6 times more likely to do their best work.



## 06 Drop the Armor

We are amazed to see people come to the mountain who have worked together for years, grinding out multi-million dollar decisions, who really don't know each other that well. In many business cultures, people have a tendency to take on a different, more professional persona when they walk through the office door. Our mentor and friend, Herb Kelleher, the late founder of Southwest Airlines, taught us early on that "professionalism" is highly overrated. Herb wanted the people of Southwest Airlines to bring their playful selves to work.

We find that people come to Sundance over three and a half days and slowly drop the armor. Whether it's kayaking the river, riding a zip line, driving an off-road vehicle or a snowmobile, hiking into a waterfall or snowshoeing in the forest, these activities inspire the playful in people. People become real. In these unguarded moments, when real personalities surface, we are endeared to one another. Imagine what this can do for creativity and productivity back at work. We also find that many of our activities create an opportunity to intermix people from different departments. The objective is to create appreciative bonds that foster team work.

If you are the CEO or team leader, you can set the tone for vulnerability at the retreat by speaking from the heart (without notes), talking about some of the mistakes you've made or developmental opportunities you have, and then, owning the fact that you are here to learn how to be more self-aware, be more innovative or be a better leader along with everyone else in the firm.



Perhaps one of the most beloved leaders of our time, the late **Herb Kelleher**, Southwest Airlines' Founder, being his "playful" self.

## 07 Make Big Decisions In-person

Decisions that can have a major impact on the entire department, division, or company are best hashed out in-person where you can look people in the eye and read their body language. There is a lot we say without words. If you really want to know what people are thinking and feeling there is no substitute for eye contact and face-to-face dialogue.

## 08 Level Playing Field

Many people who come to Sundance are new to the mountain environment. Even those who live here have engaged in activities they've never done before. Exploring new things together levels the playing field, organically opens the mind, and stimulates casual conversation. People learn more about themselves, more about others, and think in new ways about the business.

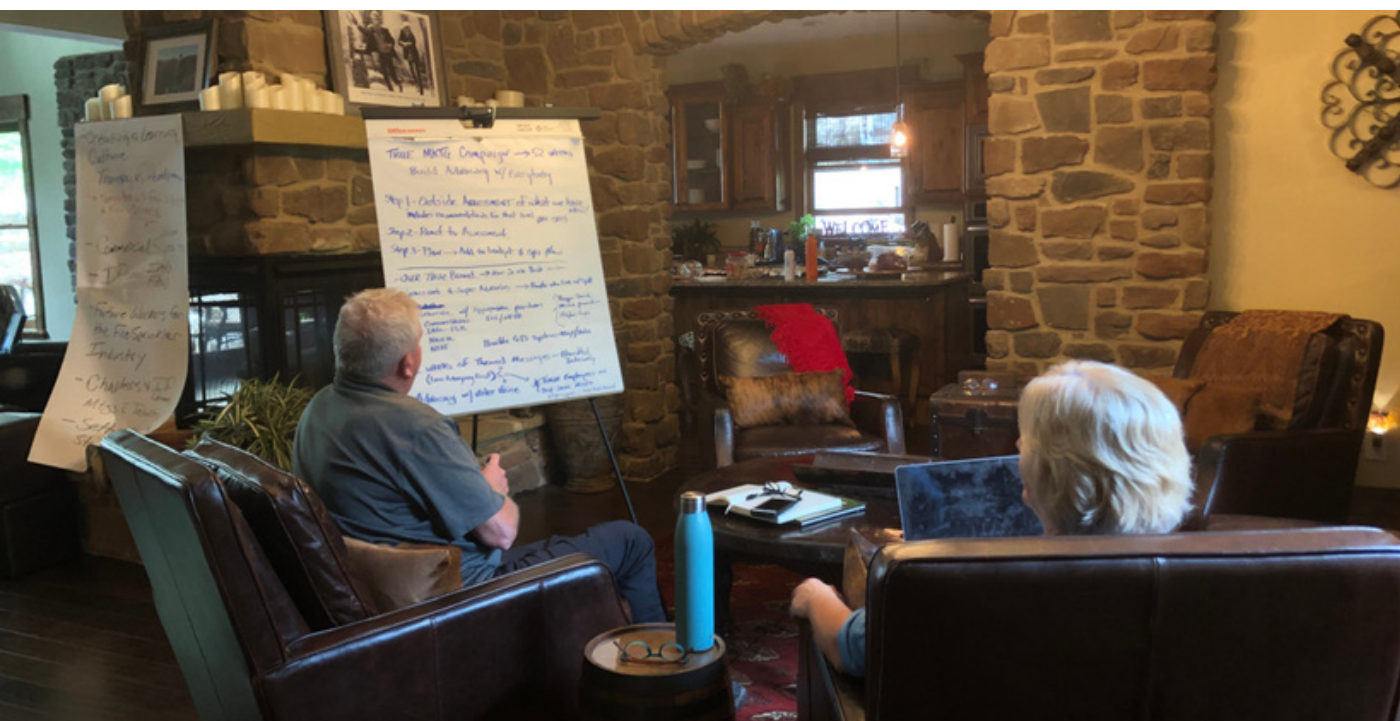


## 09 Inspire Collaboration

The bigger a company gets the more susceptible it is to tribalism. It's natural to drift into a silo mentality and engage in prioritizing our team and our turf over the company as a whole. But innovation and growth feed on diversity, on multiple points of view.

A company retreat is a perfect way to break down walls, collaborate cross functionally, and build trust. It's an opportunity to enlighten people about what's going on in other parts of the company. It's easy to become myopic, right? "My job is really hard. Theirs looks pretty easy?"

When people come to a retreat and share what they are working on, what excites and concerns them, and what they need in terms of support, collaboration has room to grow. When participants feel more connected to other people's work they're more likely to think systemically, appreciate how hard others are working, and work more seamlessly. Often, the result is alignment, a sense of purpose, and increased motivation.





## 10 Unify

Whether you are chewing on critical issues, team-building, or simply getting away to show the people you work with that they are and appreciated, the result is unifying. Put people together for three-plus days, encourage them to dig deep and play hard, and more often than not, they will develop greater appreciation for each other and for the company. Making your team feel cared for and showing that you care about the person behind the employee fosters loyalty. In the war for talent, when the competition comes calling, culture and connection count. Your people will be less tempted to jump ship.

Highly successful companies make regular face-to-face meetings part of their culture. The purpose of these gatherings is long-term effectiveness and productivity, meaningful connectedness, and a shared mindset. Imagine a team member who was on the fence about staying but after a retreat has a renewed sense of connectedness and loyalty. This is why leaders see retreats as an investment in their future and a special part of a company's bonding and loyalty tradition.



## 11 Build Bench Strength

Meanwhile back at the office, you're building bench strength as well. Provided you have coached people and set them up for success, your time away at the retreat gives those who are not attending a chance to rise to the occasion and demonstrate their competence when the team is away. Done well, this builds their trust in you for trusting them. And when trust rises, the confidence to "let go" also rises.

**PLAN WELL.  
DON'T WING IT.**



# Planning

## **Be Proactive.**

You are investing a lot of money in taking people off-site. Treat this like you would any other major initiative. Start early. Give it the time, energy, and resources needed to hit a home run, get the ROI you desire, and inspire your people to come back for more. If you run lean and fast it's tempting to let the planning for a retreat slip to the last minute. But your people will pick up on it.

## **Put the Right People On It.**

If you do all the planning internally, make sure you get input from the right people. Your executive team needs to weigh in on exactly what they want to accomplish. If you use an outside facilitator/planner (see Outside Facilitation of Not? below), insist that they talk to the person(s) who ultimately owns the event. Here are the kinds of questions we ask:

- If you could wave the magic wand, what would the outcome of this retreat look like?
- What quantitative or qualitative metrics will you use to determine the ROI on this retreat?
- Imagine your team going home after the retreat, what are they thinking and feeling?



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## Pre-work.

Retreats are an investment in people and in driving and advancing success. That said, it is critical for you to think through your desired outcomes before you press go.

*What is it you want people to think and do different as a result of having attended a retreat?*

In the following pages of this guide we will unpack six questions you must ask if you are going to press go and pull off a kick-ass retreat:

- Why do a retreat?
- Who should attend?
- What content and activities support your why?
- When will the retreat happen?
- Where will the retreat take place?
- How will you do it?





**WHY DO A RETREAT?**

# Purpose

Be clear about your core reason for meeting and what you are trying to accomplish. If you have several objectives prioritize them. Are you there to stop, take a collective step back and set vision, create alignment and foster collaboration, address some discord and build trust, celebrate milestone accomplishments and say “thank you” for people’s contributions, or just relax, socialize, and be together?

Is your desire to develop leaders, accelerate innovation, improve your culture, or create opportunity-led change? Maybe you are trying to juice up morale, spur engagement, and invigorate your team.

Is this a time to get your thumb on the pulse of your organization by listening to people’s ideas and concerns? Are you launching a new product, establishing a new office, or building a new team? Your answers will drive the choreography of the retreat. The more clear you are the more likely you will achieve your desired outcome.

Once you decide WHY you are doing a retreat, come up with a THEME that captures your why. This focuses people and helps them get in the right frame of mind before and during the retreat. **Clear objectives and a powerful theme are a grid that helps you determine the way the entire retreat should be run.**



# WHO SHOULD ATTEND?



# Invitees

## Who should be at the retreat...

...senior executives, management, department heads, your team, remote workers, or families? The purpose and objectives of the retreat should drive your invitation list. For example, if you are launching a new product or service it might make sense to invite some customers to your retreat. If there is discord between two important areas of the business, team members from each area should be present. If you are celebrating a major achievement it might be a nice touch to invite spouses so they can join in honoring the contributions of their partners. You get the point. Let the goals of the retreat determine who participates.

Then, as you plan your retreat ask yourself some questions:

- At work, what is a typical day like for each of these people?
- When they are not at work, what do they do for fun?
- Are they active, sedentary, or somewhere in between?
- Are they risk takers and early adopters or cautious, late adopters?
- What are their biggest challenges concerns?
- Does anyone have food allergies? Physical limitations?

Questions like this can help you “dial in” to your audience and anticipate their needs. They will also help you determine how to get participants outside their comfort zones and into exploring during activities while making it a great experience.

## Something for Everyone

Resolve yourself to the fact that you can't please all of the people all of the time. But you can be thoughtful about the different personalities and needs of your team. At Sundance, we try to shake it up so the group gets to enjoy as much variety as possible. That means variety in terms of food, restaurants, activities, etc. And people have choices.

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While we work hard to keep the team together, we've had participants opt out of certain activities. When this happens there is no blame or shame; only an open-minded acceptance that respects their choices.

Whether you are cooking, bringing a chef in or eating out, we've found that surveying everyone on your team before the retreat about food allergies or dietary restrictions is another way to show your team that you have anticipated them. This gives you an opportunity to plan for meals or give the restaurant a heads-up about your participants. Ensuring that everyone's needs are met is a form of hospitality that makes people feel seen and heard.





# WHAT CONTENT AND ACTIVITIES SUPPORT YOUR WHY?

# Activities

## Balance: Dig Deep and Play Hard

We think it's important to create time for work-related, deep-dive discussions AND non-business activities that are fun and exciting. The more out-of-the-ordinary the better. At Sundance, we open company retreats with a wine and cheese overview and some get-to-know-you time. Then, the next three mornings are devoted to digging deep into issues related to the retreat objectives. Afternoons are for adventure. We kayaking the Provo River, zip line, hike, and tour the wilderness in off-road vehicles. For three of the four evenings we share meals and de-brief the activities in one of Sundance's award-winning restaurants. The other evening is free time. The goal is to make the discussions relevant to the growth of the business and to engage in activities that are memorable, bonding and fun. We want people to walk away from the entire retreat and say, "WOW! Let's do that again!"

## Pre-Retreat Homework

Give people time to think about the critical issues that will be discussed at the retreat. The deeper you dig the more research, reflection, and effort you want people to put toward their contributions. This can be done in a variety of ways. Prior to the retreat, you can:

- Break your team into small discussion groups to discuss critical issues and questions that could be unpacked at the retreat,
- Provide a journal for people to write down ideas and perspectives to share at the retreat,
- Turn corporate presentations into videos people can watch before the retreat so the retreat time is saved for "meaty" reaction and discussion
- Ask a critical mass of team members for their ideas about discussion topics and activities. This demonstrates transparency, gives people ownership, and raises trust. Transparency, ownership, and trust fuel engagement.

The exception to pre-retreat homework is when you have sensitive information such as a new product launch, a major change in leadership, or a new strategy you don't want to go public.

## Post-Retreat Outcomes

Before you end the retreat, be very clear about what agreements were reached. Make sure action plans are established. Decide who will be accountable for what tasks or strategies. If you let your team leave with a hazy view of what's going to happen don't be surprised if things fall into a black hole.

Post-retreat conference calls (45-90 minutes) to discuss the progress of action items from the retreat raise the accountability factor. For the first three months following the retreat, schedule these calls monthly, then quarterly after that. This is a good way to fuel momentum. It also prevents people from coming to the next retreat discouraged because they didn't execute on the action points or plan from the current retreat. We are all motivated by moving the needle, by making a significant contribution. When we do, we are compelled to come back for more.

If you decide to plan an annual retreat and want the next one to get better, learn from your experiences. Conduct an after-action review where you ask for specific feedback. Some questions might include:

- What did you like most about the retreat?
- What did you like the least?
- How did you feel about the location? Activities? Food?
- What do you think about the time allotted? Was it enough? Too much?
- If you were planning next year's retreat what would you do different? How would you improve it?



**WHEN WILL THE  
RETREAT HAPPEN?**

# Timing

## Timing is Everything

Think about what's going on in your organization. If you are navigating a difficult time—think lay-offs, loss of market share, new leadership, lack of collaboration, cash flow problems, keeping up with growth, labor shortages, outside constraints—this could be a good time to bring people together, let them share their feelings, and acknowledge major challenges. If this is a time of too much pressure on the organization it might be better to do it during a recovery period.

If your people have been crushing it, but it has been a long haul and they are tired, a retreat could be the kick starter to rejuvenate.

In a world where change is exponential there will never be a perfect time to take people away. So, you have to be intentional because there will always be distractions and significant reasons why you shouldn't do it. It's important to ask, "What are the costs if we don't do it?" *"Intentional" means you will consider the context and the season your business is in when you schedule an off-site.*

## Time of Year Matters

Choose a time of year that works best for your team. If you live in a cold climate, maybe going somewhere tropical is an added bonus to getting away. If you're in a warm area, the snow country might shake it up for your team. Temperature could also drive the time of year you go off-site. You might want to rethink a retreat at a Texas resort in July or a Florida resort during hurricane season.

As you will see, at Sundance each season unveils the many different personalities and moods of the mountain. And each is spectacular in its own way.



UNFORGETTABL COMPANY RETREATS





**WHERE WILL THE  
RETREAT TAKE PLACE?**

# Location

## Choose A Location That Inspires

This can be a make it or break it decision for several reasons. Getting to the retreat location is as important as the retreat itself. For example, Sundance is easy to reach (60 minutes from Salt Lake International airport which has many direct flights), yet worlds apart. In an hour you are deep in the mountains. Once you are here, you are ten minutes from being in a wilderness area where you feel like you are in the middle of nowhere, yet minutes from all the resort amenities. The setting is breathtaking, refreshing and inspiring.

A retreat should be an opportunity to break away from the routine and the chaos of life and work-as-usual. Choose a setting that inspires and entices fresh perspectives. A setting that enables your team to get out of their familiar, everyday surroundings and shake up the status quo. Most likely, that's not a staid office or boring conference room. Make it a place where they can think more clearly and have some fun.

Go somewhere that inspires discovery and growth. Sundance is recognized as one of the top destinations in the world. When you look up at the awe-inspiring beauty of 12,000 foot Mt. Timpanogos you can see why. People come here from all over the world to be with each other, to be inspired and rejuvenated, to satisfy their need for creative expression and to engage in the kind of dialogue that affects positive change in the world.

Go somewhere that entices people to get out of their comfort zones, explore, and test boundaries. Sundance is a community that shares a passion for nature and the outdoor way of life. Here you can kayak the Provo River, zip down one of the highest, longest, and fastest zip lines in the world, UTV into the Wasatch Mountains with breathtaking panoramic vistas, hike into waterfalls, horseback ride, ski, snowmobile, snowshoe, and cross-country ski all within 10 minutes of our retreat location. This is a mountain environment where creativity thrives, discovery never ends, and growth is inevitable.

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**Visit the Site Beforehand:** A picture is worth a thousand words, right? Your confidence in hosting will be much higher if you have an opportunity to see the accommodations and get the lay of the land before your group is on-site.

## **Accommodations**

The quality of the place you stay, its ambiance, and amenities sets the tone for the retreat. If you stay at a first-class hotel, Airbnb or VRBO it tells your team that they are important. When people feel valued it influences their demeanor. Staying at an impeccable place inspires people to rise to the occasion and bring their A-game.

While hotel rooms offer privacy and an opportunity to get away from the group, we have found that our 7 bedroom mountain home is far more inviting. Our home, and others like it inspire people to congregate over drinks and during down time people play pool, sit at the bar and chat, and stay up for some late night conversation. Being in a home together creates the opportunity for those organic interactions walking to the refrigerator or gathering around the kitchen island while still allowing for privacy. Introverts who need to recharge from group activities have the option to retire to their rooms. Some of this would not happen if people were locked away in hotel rooms.

However you decide to do it, think about the message your accommodations are sending to your team. And if the environment is well suited to help you accomplish your why.

## **Margin/Down time Before the Retreat**

If it's possible, especially for people who have traveled a long distance, give participants time to check-in, get a snack, take a shower, and decompress before the retreat starts. When people have a chance to recharge their batteries they will engage in the retreat with far more energy and enthusiasm.

## Meals/Snacks

Decide how you will provide meals. Will you do it onsite, at restaurants, or both? Will there be any “working” meals (discussions/working sessions while eating)?

Onsite cooking or bringing in a chef can be used as a teambuilding activity in and of itself. It's usually more intimate and you don't have to transport people to restaurants. If you choose to eat out, consider time and transportation to and from the restaurants. At Sundance, we do it both ways. Breakfast and lunch is done onsite. Dinners take place (often in a private room) in each of the resort restaurants five minutes from our home:

- The Tree Room (elegant)
- The Foundry Grill (rustic, yet still elegant)
- The Owl Bar (rustic with live music and heated patio area)



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During the retreat decide what drinks and snacks you will provide. Given that we are almost at 7,000' in altitude, we try to provide healthy snacks and encourage people to stay hydrated.

### **Technology Needed**

Once you've decided your retreat agenda, identify what types of technology you need to support that agenda. If you are video conferencing or showing movie clips make sure the venue is well-connected and has reliable internet. Will you need speakers, wireless microphones, large flat-screen monitors, etc.? Can the venue provide these things or do you need to find an outside vendor?

**Whether you choose a hotel, cottages, or a private home, here are some questions to consider:**

- How far is the retreat location from the airport?
- Will the location accommodate people who are physically challenged?
- What type of transportation will you provide?
- How much time (margin) will people have between arriving and the retreat start?
- Have you considered access during winter months if appropriate?
- How will you handle meals? Transportation to and from Restaurants?
- Will the ambiance of the location support your retreat objectives?
- Are there any major events going on during your stay? At Sundance we have the Film Festival in January, concerts and theatre on the mountain during the summer.
- Will the location support all of your technology needs?

# HOW WILL THE RETREAT BE RUN?



# Decisions

## Establish Your Budget

Based on how your business is doing, your objectives, and the message you want to send to your people, decide how much you can afford to spend. What do you want your per person cost to be? What are the non-negotiables, the essential elements that must be part of the retreat? Start there and then revise your budget until it works for your company. As a reference point, companies that want to go big and have major impact spend between \$3,500 and \$6,000 per person not including outside facilitation.

Don't waste money, but don't cheap out. Make it a big deal. Make people feel proud of the work they are doing and who they are doing it with. That pride will show up in the future in a creative, whatever-it-takes mentality. When your people feel like you've gone ALL IN and invested in them, they will go ALL IN for the company.

Many company cultures are in a state of flux. People want more than efficiency, productivity, strategic initiatives and oh hum meetings. People are eager to re-engage and they want to do so in meaningful ways. A retreat offers a great way to revisit and reinforce your core values. Consider the money you spend as a capitalized investment in protecting and promoting your corporate culture. Ask yourself: "What's the price tag on retention? On hiring, on-boarding, and training new people to fill vacant positions? On engagement and accountability? If leaders are responsible for cascading the culture out to new hires, what happens if they get it wrong? Is it reasonable to assume a retreat will mitigate some of these costs?"

## If You Are on a Tight Budget

- look for airlines and hotels that offer group discounts,
- shop for packages that are all-inclusive—transfers, activities/tours, catering/meals, facilities, and accommodations,
- be proactive and book ASAP,
- go off-season during a non-prime time of year,
- tie it to an existing event. If your team is already traveling to a conference, trade show, or customer meeting, piggy back on the event to hold your retreat,

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- rent a house or cabin and get members of the team take on a meal. This can be less expensive than staying in individual hotel rooms and group dinners at restaurants,
  - don't be afraid to negotiate with venues, outfitters, restaurants, hotels, etc.

### Outside Facilitation or Not?

Do you run the retreat on your own or bring in an outside facilitator? Read and evaluate this next section knowing the we are outside facilitators.



## Objectivity

**Internal Facilitator.** The advantage of you or someone on your team facilitating the retreat is that you know the business, the issues, and the personalities of those attending. The disadvantages are all of the above and knowing so will influence your perspective.

Another disadvantage is that you play a duo role of leading and guiding making it a challenge to be a participant who is fully focusing on engaging in the process.

Internal-facilitated retreats tend to be heavily influenced by the status of those in the room. If you have an authority position in the company and you facilitate, you run the risk of squelching tough questions along with open and honest debate. You must make a concentrated effort to check titles and egos at the door. If you encourage open, honest conversation, but don't listen well and dismiss concerns you could miss a huge opportunity to engage your team and tap their talent. And that may derail the purpose of the retreat.

Internal facilitators have biases, pre-determined ideas, and taken-for-granted assumptions about the way the business works, the character and competence of the people.

**Outside facilitator.** The advantages of an outside facilitator are objectivity, a focus on facilitating, paves the way for everyone having a voice, encourages active listening, and allows each team member to participate as equal in the process. Outside facilitators are more likely to confront assumptions, ask difficult questions, and dare to challenge people with positional power on critical issues.

## Expertise

Tenure, industry expertise, history, and context comes with someone on the inside facilitating your retreat. Yet, it's important to weigh the trade-offs between this and an outsider who brings an outside-the-industry perspective. An outside facilitator can ask critical questions that insiders don't think about or questions people are afraid to ask. While an outsider will not have the business/industry experience of an insider, they often bring a wide array of experience from other companies and industries that can be quite valuable to your outcomes. For example, with eight books and 30 years of working with companies all over the globe, we bring an outside perspective on leadership, team unity, change, and innovation.

Using an outsider can also elevate the level of perceived importance people place on the retreat.

## Organization

Using an outside facilitator will add cost to your retreat. So, if someone on your team assumes the burden of organizing talking points, discussions, activities, and meals, etc., you will save money. But keep in mind, event planning is time-consuming and intense. To do it well, you might need to pull people from existing projects or lighten their loads to let them plan the retreat properly. If it is important for everyone to participate and relax without this burden, then the investment of using an outsider is worth it.



## The Sundance Experience

From the time people arrive at Sundance to the morning they leave, we handle everything. This includes designing the discussions for each of the three mornings, leading each of our team building activities, hosting wine and cheese events, and coordinating meals at restaurants. Once on-site, participants get to be participants.

## One Size Doesn't Fit All

One Size Fits One. To zero in on retreat objectives we conduct pre-retreat interviews with the “owner” of the retreat and key informants to learn about the business, culture, industry, team dynamics, and objectives. From this homework we craft the morning discussions and the flow of the three and a half days we are together.

## Decision Making During the Retreat

When it comes to the work-related discussions it's important to give participants a sense of how decisions will be made. Will you brainstorm without judgement or criticism and then debate the merits of an idea? Will you make decisions by majority vote or by the person in charge? Clear is kind. Participants should know whether they are making decisions senior managers will support or recommendations senior managers will take into consideration.

If people are led to believe they are making decisions, when in fact, the boss is going to decide, they might feel betrayed and the purpose of the retreat will backfire. If the person in charge asks participants to implement something they had no ownership in, this can also derail the outcomes of the retreat.

## Build Anticipation—Communicate the Plan and Expectations

For both logistical and emotional reasons, we communicate with each group that comes to Sundance weeks before the retreat. For us, the guest experience starts the moment they say “yes,” or know their company said “yes.” Logistically, we want people to feel anticipated. We want them to be extremely comfortable on the mountain. Here, the weather can change radically and quickly. We discuss what to where, when, and how to pack for this mountain environment. We also send out the daily agenda so everyone knows what to expect, where they will be and when. This reduces uncertainty and enables participants to keep their families informed.

Emotionally, we want people to anticipate the retreat with a sense of excitement. We want them to know: “What’s in it for me?” This can be done in writing through emails and texts and/or short videos. We also discuss what it means to come with a posture of expectancy and a sense of adventure and exploration. We want people to come with the right mindset. That is, *the retreat is what WE make it--everyone owns the outcome.*

You really can’t over-communicate and you can’t be too thoughtful about messaging. People learn in different ways at different times. Some team members will read what you put out immediately, some at the eleventh hour, and some not at all. The more you communicate in detail the fewer surprises there will be. This puts people at ease, enables them to relax, and builds anticipation for attending the retreat.

### Here's a communication check-list:

- Exact dates and location of the retreat at least two months in advance,
- Word or literal picture of the accommodations,
- How transportation to and from (and during) the retreat will be handled,
- Theme and objectives of the retreat and why they were chosen,
- Detailed agenda from start to finish,
- Expectations and roles of the participants,
- Pre-work questions, research, idea generation,
- Weather predictions if you are going outdoors,
- How to pack for restaurants, discussions, and activities.

## Surprise Take-aways

We want guests to have something to take away as a memento of their time here at Sundance. Often, that involves a Sundance branded Yeti-style coffee mug, picture frame and soap from Sundance Farms. Guests also get some things during the retreat to take home and remind them of some of the principles discussed during the retreat. We make sure that what they get can be packed for an airplane.

## Be Flexible

At Sundance, the weather on the mountain can change in a heartbeat. Thunderstorms in the summer and snow storms in the winter often come with little or no warning. Even with the most careful planning, unforeseen challenges will arise. So, you have to take it in stride and have some contingency plans in place. If you do, you will be more agile and adaptive.

During one of our Fall retreats we got on the river in kayaks. Half way down it rained and then hailed. The group turned it into an adventure and had fun with it. Plus, it made their story more dramatic and their time on the river more memorable. Having survived the adventure, no one opted out of the off-road experience the next afternoon when the weather was slated to be equally as bad. As is commonly said in the mountains, *"there is no bad weather, there's just bad clothing."*

## Capture the Memories

If you are going to a special location and participating in memorable activities, consider a photographer/videographer to capture people in action. At Sundance, we have someone capture "b-roll" (silent raw footage) from our discussions and working sessions as well as our dinner events. We also have them capture people playing and reacting together during the outdoor activities. The outcome of this raw footage could be a short compilation video, a beautiful photo book for each participant, or something as simple as a shared album on Google photos. The point is to give everyone something that allows them to relive the memories.

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## Create Time to Decompress

Although participants have told us that it is the right balance of discussion, play and down time, at Sundance we keep people very active for three days. They leave on a high, but they leave tired in a good way. If it's possible, give people a day to decompress before they go back to work. This gives them time to reflect on what happened during the retreat, debrief it with loved ones, and go back to work re-energized.





# RETREAT ACTIVITIES

# Ideas



## Get-To-Know-You Icebreaker

Blow up a beach ball and write a bunch of questions in it. Decide whether you want them to be off-the-wall or relevant and thought-provoking. Toss the ball around the room enough so everyone get a couple of turns. When someone catches the ball they can introduce themselves and their job. Then, have them answer the question closest to their index finger on the ball.



## Fictitious Competitor

This could be done either before or during the retreat or both. Break your team up into groups. Ask them to create a formidable fictional competitor that could threaten the success of your company in 24 months. Who runs this company? How do they operate? What's their culture like? Who do they hire and how? How do they serve customers? What makes them so scary? Then, create new groups and ask each of them to come up with 3-5 success strategies to be better than the fictitious company.



## Team Cook-off

From burgers and pizza to salsa and barbeque sauce, friendly competition reveals how people work together and who needs what to flourish. Any activity you walk away from where you learn more about others and what they need to thrive is a win for the business as well as the participant. A corollary to this is taking everyone to a cooking class.



### Community Project

When you bring people together to serve the community you create a feeling of teamwork, humility, goodwill, and significance. People feel good about doing good. Many years ago the marketing team at Southwest Airlines went into several inner city areas to paint out graffiti. Plastered with paint from head to toe, they laughed, told stories, interacted with community officials, and had a blast together.



### Wine, Bourbon, Beer Tasting

Figure out which one would be most attractive to your group, then set up a tasting that is truly educational. If your group is sophisticated, break people into small groups and do a blind tasting. Make it a fun competition to guess the varietal and country of origin of the wine.



### Sporting Event or Concert

Taking your team to a sporting event or concert where they can simply be together being entertained and sharing a memory can be a great bonding experience.

# SUNDANCE SPECIFIC ACTIVITIES



# SUMMER

**At Sundance** we trade boring presentations, stale conference rooms, awkward team-building events and forced socializing for activities that are exciting and memorable:



## Kayaking

Five minutes below our home is the Provo River, a relaxing class I-II float with views of Mt. Timpanogos and beautiful scenery at every turn. Kayaking in tandem kayaks is a great team building activity.



## Scenic Chairlift Rides

During our retreat we take people via chairlift to the top of Sundance for lunch at Bear Claw's cabin. The cabin/restaurant was named after Bear Claw, the character in Robert Redford's movie, Jeremiah Johnson. The 360 degree, panoramic view from the summit is spectacular.



## Mountain/Road Biking

Sundance has over 25 miles of lift-serviced, singletrack mountain biking for intermediate and advanced riders. If cycling is your thing, the Alpine Loop has extraordinary vistas. You can ride along the Provo River as well.



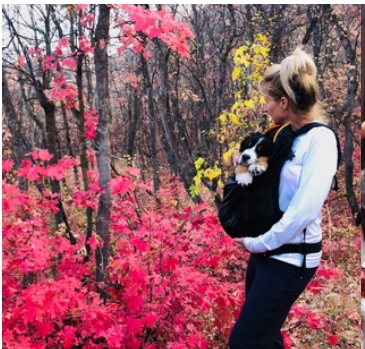
### Horseback Riding

Located at the base of 12,000 ft, Mt. Timpanogos and near Stewart Falls, the Sundance Stables will take you on a scenic ride through a mountain range you'll never forget. Keep your eyes peeled, it's very possible to see wild turkeys, deer, and elk.



### Sundance Zip Tour

With over 2,100 feet of vertical drop, the Sundance Zip Tour is one of the highest, longest and fastest zipline in the world. It includes four spans that cover almost two miles. After training, you ride the chairlifts to the top of the mountain and zip your way back to the base.



### Hiking

For the beginner to advanced hiker, there are over 10 miles of alpine trails that take you through gorgeous mountain terrain, beautiful meadows, and river beds. One of the most popular hikes is up to Stewart Falls. If you are here in the Fall the colors are unbelievable.



### Off-roading

Explore country that can only be accessed in an ATV or side-by-side. Then, look out over mountain top vistas that are stunning. If you're brave enough and don't mind getting wet, you can fly through some river beds and small creeks.



### Golf

Just 20 minutes from Sundance is Soldier Hollow Golf Course, a 36-hole championship course tucked into the base of the Wasatch Mountains. It offers amazing views of Heber City and Midway.



### Sundance Music

There are a variety of music events that happen at Sundance. The most famous is the BLUEBIRD CAFÉ CONCERT SERIES which comes to Sundance's outdoor amphitheater on the mountain five times a year. At these concerts you will listen to the singer-song writers behind the country music hits you know. Gifted local artists perform on the lawn at the base of the mountain during SOUNDS OF SUMMER and LOW KEY VIBES. Then, on Friday and Saturday nights some of these same talented artists play in the Owl Bar at Sundance.





UNFORGETTABL COMPANY RETREATS

# WINTER



## Skiing and Snowboarding

Sundance is the perfect place to learn to ski or board. The ski school is what brought us here 26 years ago. The ski area has expanded dramatically and offers everything, from beginner to expert terrain. If you want to shake it up, there are 11 other ski areas within one hour of our home. But we will warn you, none of them have the unique view offered by majestic Mt. Timpanogos.



## Sundance Nordic Center

Perhaps one of the most beautiful nordic centers in the world, the Sundance Nordic Center has 15 kilometers of cross-country trails. The Center, located just two minutes above our home, teaches both classic and skating techniques.



## Snowshoeing

In just minutes, you can experience the serenity and peacefulness of the woods on one of the Nordic Center's snowshoe trails. If you're here during a full moon you can snowshoe at night.



### **Snowmobiling**

Utah is renowned for 100's of miles of forested snowmobile trails. We use an outfitter that will take you up to 11,000 feet in the Wasatch Mountains where you can look out over scenic vistas



### **Dog Sledding**

If you want to learn what it's like to be a real musher, you can go for a thrilling ride, learn to drive a sled, and have time to love on the incredible athletes. We mean dogs. Located 45 minutes from our home, this is a one-of-a-kind adventure.



### **Sundance Film Festival**

Sundance Mountain Resort is where the Film Festival started. When it got too big for the resort to host, the Festival moved to Park City. But with the original screening room on site, the resort still hosts films during the Festival in January.





# YEAR ROUND



## Fly Fishing

Five minutes below our home and the resort is one of the epic fly fishing rivers in the west, the Provo River. Loaded with Brown Trout, Rainbow Trout, Cutthroat Trout and even Brook Trout, the Provo is a Blue Ribbon fishery for seasoned and beginner anglers.



## Art Studio

The Sundance Art Studio is another way to step off the treadmill, get away from the chaos, and escape. Here, you can learn to make jewelry, throw a pot, make a leather journal, paint, make soap or make a print. During certain times of the year, you can watch artisan glass blowers blow everything from glasses and vases to elegant decanters.



## Bourbon Tasting-Distilling

More of a long-term, teambuilding project, you could make a barrel of bourbon with a master distiller. At Sundance we do it with James Fowler, founder of Sugar House distillery. It begins with an extravagant tasting to determine the flavor your group wants and is accented with James educating your team about the distillation process.



### Sundance Spa

Two minutes down the street from our home, you can indulge in a massage, body treatment, facial, and other wellness offerings at the Sundance Spa.







# 7 THINGS THAT WILL SINK YOUR RETREAT

# WARNING!

The list of things that could go wrong and torpedo your retreat could go on and on.

Here are a few you should anticipate and mitigate:

## 01 Checked-out Leaders

Retreats are an opportunity for leaders to lead, not dominate mind you. They provide time for leaders and team members to bond and collaborate in more generative ways. This means the owner of the meeting should be involved in setting objectives and outcomes for the retreat. If the retreat is designed by committee without the active participation of the owner it's all guess work. When it comes to how the objectives are met (the design of the retreat) a leader can adopt a "hands-off" attitude to empower staff. But to be indifferent or completely abdicate retreat planning is a huge mistake.

## 02 Feature Creep

Be careful not to cram too much into your retreat. Getting away is an investment of time and money. You'll want to account for working hours lost and justify what your people are doing instead. When the meter is running, it's tempting to fill the agenda with as much as possible. But if your people need a vacation after their time away that defeats the purpose of getting away. Rather than overbooking the retreat with a schedule that is jammed, make the most of the sessions you have.

Our retreats are loaded with discussion time in the mornings--a four-hour, throttle down time to problem solve, bond, and create. But about the time people have had enough intellectual activity we switch gears, take them outdoors, and play hard.

We've also learned to build in some unstructured free time for people to reflect on the activities they've been through or to connect with others organically and build stronger bonds. Leave "breathing room" in the agenda for people to catch their breath.



### 03 Zombie Retreats

Listening to a series of reports about how great the company did or where it's lacking is a sure way to torpedo the retreat. Get people involved in discussions and decisions. Talk with them, not at them. Make it safe for them to participate, create space for people to think big and act bold.

### 04 Avoiding Difficult Conversations

Often, the temptation during a retreat is to avoid the elephant in the room—the real issue. It's easier to focus on symptoms: "We don't communicate as well as we need to." When the underlying cause might be: "We don't trust each other or feel safe with each other." If you are willing to "look under the hood" and engage in authentic, transparent dialogue about the real issues and what to do about them, a retreat can be transformational.



## 05 Not Enough Time

Closely related to feature creep is not allotting the time necessary to adequately address tough topics. If you are going to take on a dicey issue, make sure there is enough time to bring it to some type of closure. To leave a crucial conversation hanging can create more fear, cynicism, and uncertainty among team members.

## 06 Lack of Integration

Even if the retreat is a get-away to celebrate people and give them an opportunity to relax with each other, it should be tied to something larger like reinforcing the culture of the company. The best retreats are not one-offs; they are integrated. That is, they are tied to the work of the company or how the work gets done. They build on conversations about critical issues that are already taking place in the company. There is a synergy between what goes on in the retreat, the company's values and where the company is going.

## 07 Cheap Alcohol and Food

If you want people to feel valued, serve good food and decent drinks. We're not talking about \$400 bottles of wine, Pappy's bourbon or \$200 steaks. Food and drink are essential parts of your retreat presentation. We're talking about being appropriate but classy.

If you are taking a large group off-site, make sure there are enough servers and bartenders so people don't have to wait in long lines. If you are in a private room at a restaurant, work with the staff to proactively create the kind of experience you envision for your people.

A hand holding a glass of red wine in a dimly lit restaurant setting. The background is blurred, showing other people and tables.

**DONE WELL**

A great retreat should  
give your people a chance to:

**REFLECT.**

**REFRESH.**

**REIMAGINE.**

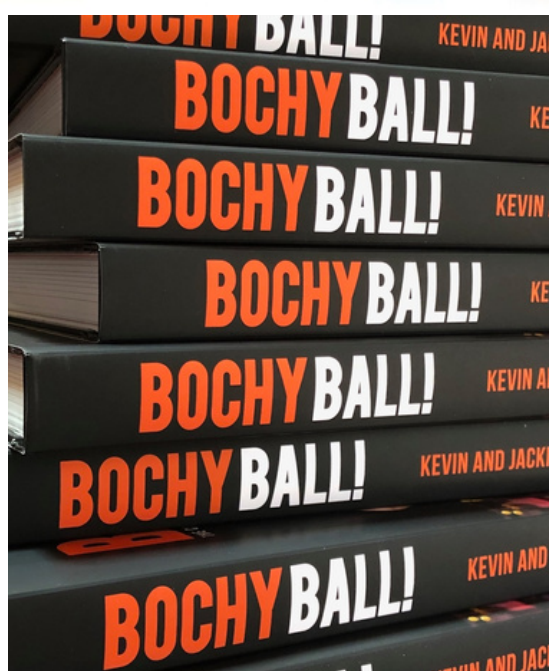
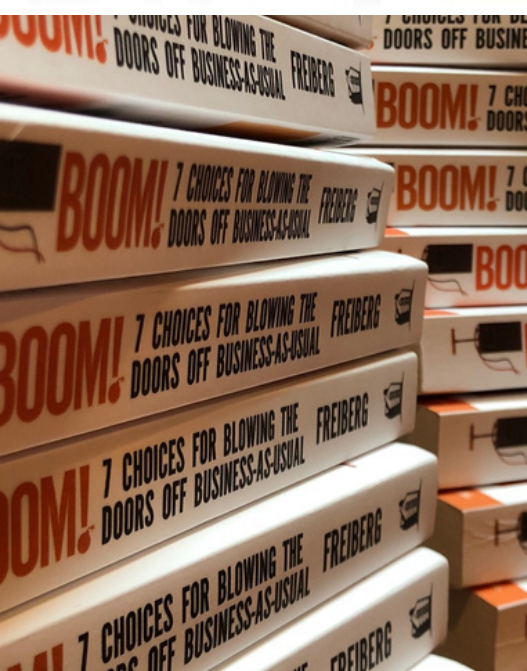
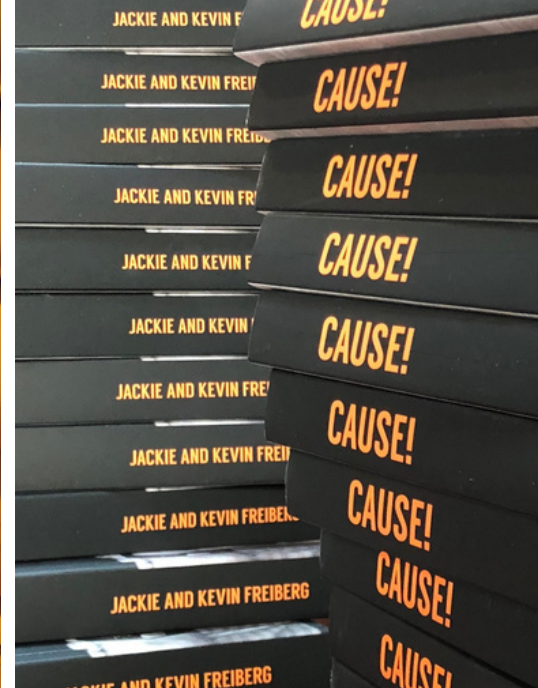
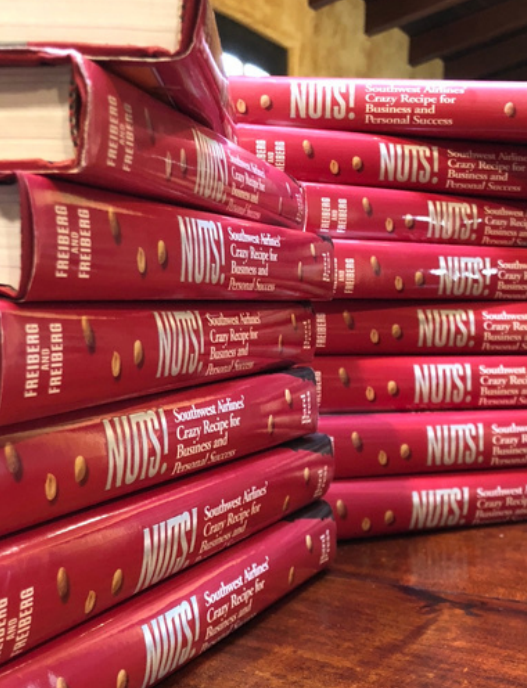
**AND...**

**RESURGE!**

Cheers to crushing it!

**Drs. Kevin and Jackie Freiberg** are partners in a firm that equips leaders for a world of change. They have provided keynotes, seminars and retreats to over 2000 companies in 60 industries around the globe. Recently, they started hosting corporate and couples retreats and bringing the world to Sundance.





The Freiberg's award-winning books profile gutsy leaders who dare to dream big, fill a room with energy and do things others say can't be done. A blend of rigorous research grounded in real-world strategies and memorable storytelling, their books will stretch your thinking, engage your imagination and challenge you to do something now.



COME JOIN US!  
**RETREATS**

SUNDANCE