

Strategy and planning awayday / workshop

The sponsor's checklist

Nine decisions to make before anyone books a venue

You are paying for the day and you own what happens afterwards. Most disappointing awaydays were decided badly weeks before, not delivered badly on the day. Work through these questions before you brief a facilitator or hand anything to your organiser.

A good answer is one you can say out loud in a single sentence. If an answer takes a paragraph, it needs more thought.

1. Purpose: why this day, why now

- ☐ Name the trigger. What happened in the last three months that made you want this day?
- ☐ State the purpose in one sentence to someone who was not in your head when you had the idea.
- ☐ Decide which day this is: aligning the team behind a decision you have already made, or making the decision together. These are different days and they need different designs.
- ☐ Check you are not using a group day to avoid a conversation you should have one to one.

2. Outcome: what is different on Monday

- ☐ Write down the three things that must exist at the end of the day and do not exist now. A decision. A plan. A shared understanding. A disagreement resolved.
- ☐ Decide whether the team leaves with decisions or with recommendations for you, and tell them which before the day rather than during it.
- ☐ Set a six-month test. If the day worked, what will be measurably different by then?
- ☐ Decide what you will do with the output. If the answer is "circulate it", expect nothing to change.

3. People: who is in the room

- ☐ List every attendee and, next to each name, why they need to be there. If you cannot answer, they do not.
- ☐ Decide about the layer below your top team. Including them changes the honesty of the conversation, in both directions.
- ☐ Decide who must not be there. If the goal is honest feedback on your own leadership, that question includes you.
- ☐ Brief the facilitator on the tensions: the two who do not get on, the promotion that stung, the resignation nobody has mentioned. A facilitator walking in blind will find all of it at eleven o'clock, in front of everyone.

4. Scope: what is on the dartboard

- ☐ Name what is genuinely open for debate.
- ☐ Name what is settled and not being reopened, and say so early in the day.
- ☐ Name what is off limits entirely: a deal in progress, an individual's performance, a pay review.

Silence reads as permission

If you do not say a topic is closed, the room will assume it is open. Half a day spent reopening a settled question is the most common way an awayday wastes its own time.

5. Your own role on the day

- ☐ Decide whether you are participating, chairing, or observing. Choose one and say which.
- ☐ If you want honest challenge, plan to speak less than anyone else in the room.
- ☐ Give the facilitator permission, in advance, to interrupt you when you talk too much. They will not take it unless you offer it.
- ☐ Decide how you will react when someone says something you do not want to hear. The room will read your face, not your words.

6. Input or facilitation: the balance you want

Most days sit somewhere on this scale. Pick your point before you brief anyone.

Mostly input	New tools, language and models from outside. Suits a team that is stuck inside its own thinking or new to leading at this scale.
Balanced	Content in the morning, applied to your business in the afternoon. The most common choice, and usually the right one.
Mostly facilitation	Your content, your agenda, an impartial chair and a structure. Suits a team that already knows the answers and needs to reach them together.

- ☐ If you have run awaydays before, decide what you are doing differently this time, and why.

7. Follow-through: decided before, not after

- ☐ Name the owner of each likely output before the day. Ownership assigned at 4.30pm on a Friday rarely survives the weekend.
- ☐ Put the review date in diaries now. If it is not in the diary before the awayday, it will not happen after it.
- ☐ Decide where progress gets reported: your existing board or management meeting, or something new.
- ☐ Decide what happens when an action slips, and who says so.

8. Money and time

- ☐ Set the budget and be clear whether it covers venue, catering, accommodation, travel and the facilitator, or only some of those.
- ☐ Count the real cost. Eight senior people out for a day is the larger number, not the invoice. Judge the day against that.
- ☐ Consider a second, shorter day four to six weeks later instead of a longer single day. Coming back to report progress does more for follow-through than another two hours of discussion.

9. The brief

- ☐ Give your facilitator and your organiser the same brief. Two versions produce a day that satisfies neither.
- ☐ Tell the facilitator the thing you have not told anyone else. It is usually what the day is really about.
- ☐ Describe what a bad day would look like. Facilitators find that more useful than a description of a good one.
- ☐ Agree how you and the facilitator will talk during the day if the plan needs to change. It often does.

What next

There is a companion checklist for whoever handles the practical organising: venue, room layout, kit, catering, pre-work and capture. Send it to them.

If you want to talk through the design of a day for your own team, book a conversation at bobbbradley.co.uk/meet. I do not charge for the first one, and I do not mean a pitch session.

Bob Bradley has led six businesses as GM, MD or CEO, three with up to 500 staff, and facilitated over 800 meetings with more than 300 business leaders.