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Generating new ideas through a team retreat

Posted on November 12th, 2012 Written by [Wanda Kenton Smith](#)



Through the years I've noticed that marine marketers often hibernate between the last show of the fall and the early-winter onslaught. Although boat sales traditionally cool off when the mercury drops, that doesn't mean our marketing activity should chill. In fact, this is the ideal time to get your team fired up for 2013. I'm suggesting a team-building strategy to ignite the passion of your marketing group.

First, plan a retreat. Invite your marketing team to participate in a minimum full-day, totally dedicated marketing retreat. This may be two people or 10, in-house only or in combo with your agency. Whoever is involved in planning and executing your marketing program should be encouraged to participate.

Second, leave the boardroom behind. Take your retreat offsite. It's amazing how a change in scenery can encourage candor and stoke the fires of creativity. Select an easily accessible location that will allow your team to feel totally comfortable and to work uninterrupted. A few ideas to spur your thinking on venues: I've held retreats aboard a yacht (a blast that my team loved), in my home, in a hotel boardroom, in a condo poolside clubhouse — even at a wilderness resort lodge.

I once attended an incredible two-day marketing retreat held by a vendor in Vail, Colo., with meetings in the morning and skiing in the afternoon. Now that was heaven! Whether you meet in someone's home or in some exotic location, getting away from the humdrum and interruption of the office is the way to go.

Another simple tip: Plan meals in advance and have plenty of beverages and snacks available. I'm a big believer that breaking bread together helps break down barriers.

Another recommendation: Make it "very casual" Friday dress. The goal is getting your group to relax and unwind in a warm and friendly atmosphere that promotes teamwork. Leave the suits, ties, button-downs and high heels at the shop.

Third, prepare well. Don't go to the effort of arranging a site without developing a plan. The goal here is to maximize your time together and get the most from your collective brainpower. As the retreat planner and the marketing executive in charge, you must identify goals and tailor your strategies and tactics to those goals. I've also found these sessions to be powerful relationship builders and enhancers.

Before the meeting at which you explain your plan for the retreat to your team, prepare a list of the marketing initiatives undertaken in the past year. Give everyone a copy and ask them to be prepared to candidly share their thoughts about the strengths and weaknesses of each initiative and to bring specific suggestions for improvement.

For example, if you participated in boat shows, what worked well? What didn't? What can you do to improve? What did you see others do that seemed to work well? Ultimately, you will want to drill down responses so you can analyze your performance and identify areas for improvement.

Assign team members to come to the meeting with three brand-new marketing ideas to consider for the coming year. Offer an incentive for the best new idea, as chosen by group vote. It can be a cash prize, a gift certificate, dinner for two at an upscale restaurant, maybe even a full-day boat rental or boating charter. Incentives work!

Fourth, build momentum. If your team is like those I've been associated with over the years, they will be excited by this opportunity, but if you haven't done a retreat before they may also be a bit nervous. Leaving the workday behind and brainstorming is fun, but some folks are intimidated by the idea of speaking up and sharing their opinions in a group setting. Send out an email after your introductory meeting to summarize the assignment, and then every few days or each week follow up with a countdown (days to the retreat) or a quote about teamwork.

Fifth, 'Big Day' dos and don'ts. Get there early and make sure all is ready for your team's arrival. Although we live in an iPad and PowerPoint time, you should have pens and paper pads available. I'm a bit old school in this regard, but I'm visual and I still love a flip chart and colored markers for brainstorming. Use whatever tools best fit your team's profile.

As your team arrives, host an icebreaker to warm things up — a brief scavenger hunt or a guessing game, Pictionary, or even a more challenging event, such as a ropes course, if the setting permits. A plethora of team-building activities are available to choose from (search online or find resource books at your library or bookstore). Do something interactive to get the blood pumping.

Once it's time to start the meeting, review in detail the agenda you've prepared. Make sure it is time-sensitive and appropriate for all that you plan to cover. I usually prioritize my subjects with the most important discussion points at the top, then set aside specific time blocks for each and monitor the process throughout the meeting. Indicate where you have built-in breaks and meals so your team knows what to expect. Cellphones need to be turned off and checked only at breaks; no texting allowed! Review any other protocols and see whether anyone has questions. If not, it's time to throttle forward.

Sixth, meet for success! Your team is fully accounted for and well prepared to share their ideas and suggestions. You have a great location and a solid agenda. Everyone knows the rules. You're set for success. Here are a few final tips to ensure you enjoy the best return on your marketing investment.

First, set the stage for brainstorming by communicating that there are no stupid ideas or wrong answers and that everything is ruled "in" at this stage. Encourage people to speak up and contribute. The fastest way to shut someone down and kill the spirit of teamwork is by blasting an idea or allowing someone else to do so. Each participant should freely share his or her ideas, and as the retreat moderator it is your job to ensure there are no brainstorming buffoons or blunders.

Do not allow an individual to dominate the discussion, and that includes you. A gifted moderator knows that encouragement after people share their comments builds confidence and stimulates greater

participation by all.

Second, assign someone in the group to be the “recorder.” This could be the person with the best handwriting, who keeps notes and/or is the writer on the flip chart (or their PC or tablet).

Another assignment is to put someone in charge of monitoring the clock and providing a five-minute warning before the conclusion of a particular segment. This allows the moderator and/or group to choose to continue the conversation or not.

At the conclusion of your retreat, take time to verbally review and summarize key findings. As moderator, be sure to explain that the next steps will involve the management team to sort out the priorities, budgets and plans. Genuinely thank each person for his or her contributions. Vote on the best idea, present the reward and then wrap up as desired; a casual dinner is often a winner.

Seventh, put the action in the plan. I hope your retreat has given your team an opportunity to clearly reflect on your recent marketing initiatives and to determine areas for improvement in the coming year. New and exciting ideas likely have emerged. I’ll bet the entire team will leave the retreat re-energized about their roles and the future of the company.

As the retreat leader, send a thank-you note to each participant and mention at least one specific contribution that individual made that you believe is notable. Don’t wait a week; strike while the flame of enthusiasm is hot.

Second, get your “recorder” to prepare a final document that captures all of the key points of discussion.

Third, reflect, review and meet with your management or ownership to share the outcome of the retreat. You are well on your way to developing a written marketing plan for the coming year.

Once the new plan has been blessed, bring together all those who participated in the retreat and share it. Recognize the team’s contribution to its development and thank each person.

Don’t be surprised to discover that many direct and indirect benefits of hosting this retreat will be felt for days and months to come, in delightful and unexpected ways.

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