

**Mission:** *Creating Exceptional Team Synergy Through Excellence in Retreat Planning, Facilitating & Follow Up.*

**“Excellence”** is *“The Superb Execution of the Basics”*

### The 10 Basic Steps to Creating a Successfully Executed Retreat

A Custom Learning Systems Group Ltd. facilitated retreat is based upon a 10 step planning, execution and follow up process.

#### **STEP #1: CLARIFY THE APPROPRIATE RETREAT FORMAT**

We jointly clarify the right retreat format to meet your needs.

- A. Strategic Planning
- B. Team Building / Morale Enhancement
- C. “Activities” / “Bonding” Event
- D. Personal Growth / Professional Development
- E. Focus Group(s)
- F. A combination of A-F above

#### **STEP #2: LOGISTICS PLANNING**

We brainstorm with you to select the right location, if not already selected, and we provide you with a **“Retreat Planner’s Guide”**.

#### **STEP #3: CONFIDENTIALITY AGREEMENT**

To satisfy any concerns you may have with protection of proprietary or sensitive information, we include a signed **“Confidentiality Agreement”** along with your Retreat Engagement Letter.

#### **STEP #4: PRE-PROGRAM QUESTIONNAIRE**

To gain an initial assessment of your issues and goals, we supply a **“Pre-Retreat Questionnaire”**. This information helps us prepare for the **next step**.

#### **STEP #5: PARTICIPANT PRE-RETREAT INTERVIEWS**

**Where appropriate**, in order to develop and finalize the **Retreat Agenda** and clarify goals and objectives, we offer the **option** of conducting an **individual telephone interview** with each participant.



### **STEP #6: AGENDA / PROGRAM DESIGN**

Based upon feedback from Steps #4 and 5, upon request, we collaborate with you in the **final design** of a **draft Agenda** and Retreat Program which may include both the formal educational content and the informal social component.

### **STEP #7: RETREAT PROMOTION**

We invite you to consider how you may want to promote a **positive expectation** towards attendance including:

- A. Planted **reminder cards**
- B. Program **flyer(s)**
- C. Ordering of **retreat-wear**. For example, T-shirt / sweat-shirt, etc.

### **STEP #8: FACILITATING THE RIGHT BALANCE**

A critical aspect of producing a successful retreat is to strike the **right balance** of:

- Discussion
- Education
- Brainstorming
- Relationship Development / Bonding
- Professional Development
- Implementation Planning

The “**Welcome!**” to your retreat would start with an “**icebreaker**” and conclude with an **agreement on Retreat ground rules**.

It’s also critical, regardless of the nature of the discussion, to end on a “positive high note”.

For future improvement, everything is evaluated.

### **STEP #9: NEXT STEP IMPLEMENTATION RECOMMENDATIONS**

Immediately following the Retreat, we proceed to develop what we call: “**Next Step**” **Implementation Recommendations**.

### **STEP #10: POST-RETREAT DEBRIEF**

To fully leverage the benefits, we:

- A. Provide a “**Post-Retreat Questionnaire**” to stimulate a thoughtful **follow up process**.
- B. Discuss with you how we can **creatively assist with Implementation**.



## SATISFIED RETREAT CUSTOMERS SAY IT BEST

4440 West 95th Street  
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November 7, 2000

Mr. Bruce Lee  
President  
Custom Learning Systems Group, Ltd.  
2133 Kensington Road, NW, Suite 200  
Calgary, Alberta, Canada T2N 3RB

Dear Bruce:

I want to thank you for the valuable role that Brian Lee played in our recent Executive Leadership Retreat at the Four Seasons in Chicago. As you know, achieving excellent customer service is a top priority of Advocate Christ Hospital and Medical Center. Brian's presentation provided an energetic and valuable start to our meetings that set the leadership agenda for the coming year.

As we discussed, service excellence is a key strategy for Advocate Health Care as a whole, and we are excited about improvements we are making in this area. As one of the nation's top ranked integrated health systems, we believe that delivering exceptional service in all areas of our system is critical to our future success. In doing so, our system leadership of physicians, administrators, and board members provides the direction and example that will determine how successful we will be in this area.

Brian's talk was well received by everyone at the retreat. Our feedback on his message and delivery was extremely positive and considered to be right on track with our commitment to service excellence. It is clear to me that there is a strong need for Brian's message in health care today and for the future. Thank you for helping to make our event a success and for supporting us in our journey towards achieving the 95% in overall patient satisfaction.

Sincerely,

  
J.P. Gallagher  
Director, Surgical & Outpatient Services



Newport Harbor  
Radiology Associates Group

"Well prepared. A lot of thought and details addressed prior to meeting which saved time and was organized."  
Lynda Frye

"Brian opened up the groups ability to communicate with each other and made everyone feel involved."  
Roger Thomas

"Excellent leadership, kept the group focused and on track."  
Adrian Jameson



**CROWFOOT VILLAGE FAMILY PRACTICE**  
STRIVING FOR EXCELLENCE IN  
COMPREHENSIVE CARE

"Enthusiastic, practical, participative. Excellent use of adult learning principles."  
Rick Ward, MD

"Energetic, motivating, fun, knowledgeable, and well researched."  
Debbie Lopishinslay, RN

"Exceptionally well done. Interactive – learned lots!"  
Sean Smith, Senior Manager



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