

By Tom Schuman

# Going Back to Move Forward

## Successful Companies Plan for the Future

Company retreats come in various forms. Although there is no single method employed to reach one's goals, there are a couple of common attributes:

- The nature of the word retreat – a quiet, private or secure place – leads most to find their way to a location away from the everyday distractions of the workplace
- While many businesses face enormous economic and time pressures, those dedicated to future growth make and follow through on the commitment to engage in the planning process

Roger Laidig of Laidig Systems, Inc., in Mishawaka says, “I don't think we can afford not to do it. If you don't have the energies of the team flowing together, you lose a lot of horsepower.”



## Location, location, location

The retreat setting is important for several reasons. One is to avoid interruptions.

“The word retreat conjures up the image of being able to do that, forget the day-to-day, to get away and dedicate a block of time,” states Andrea Davis, vice president of Indianapolis-based FlashPoint, a human resource consulting firm. “It’s much easier for people to get out of the business setting, to dress in a casual manner and not be tempted to go check their e-mail and never come back.”

It’s not enough to merely be away from the office or worksite. Placing people in the proper frame of mind opens them up to the creativity and innovation that are typically part of such sessions.

Michael Goldsby, an associate professor of entrepreneurship and management at Ball State University, notes that nontraditional settings hopefully translate to “people not being in a judgmental state. They drop their usual mindset and get to think a little differently. It’s important early on in a project; people are less critical and open to learning.”

Tim Roberts takes the significance of the setting to a third, somewhat deeper level. Roberts, president of Effective Selling Methods in Indianapolis, focuses on sales training and consulting. His comments also point to his experience as a motivational speaker.

“You want to look for an opportunity to relax, breathe deep,” he claims. “A great retreat takes place in a nurturing environment. Fun and laughter are part of that environment. A training rule is that adults are babies in big bodies. When do babies learn the most ... when they’re doing and laughing.”

Goldsby offers an exception to the “get away from it all” atmosphere. He has witnessed executive education programs and other company learning experiences that benefit from an academic setting.

He points to Ohio State University, which has constructed a world-class hotel as part of its business school. Campus retreats can take place in what he terms a comforting collegiate environment.

“It’s not a traditional classroom experience. Professors learn a little from the business people,” Goldsby explains. “In that situation, in something led by academics, the university setting can be special.”

## Pony up?

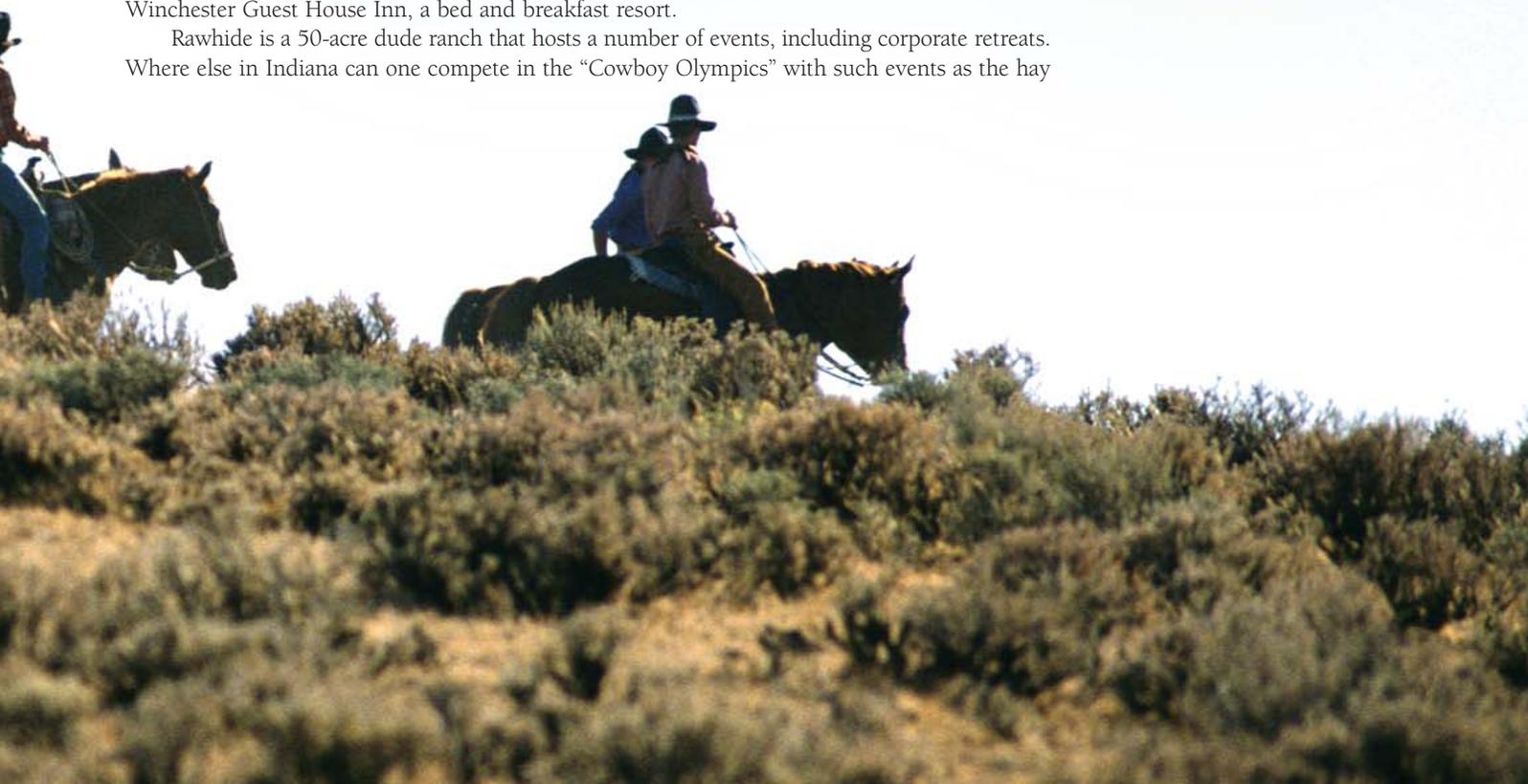
Getting away from the norm can mean a variety of different locations across Indiana and beyond. The extravagant, sometimes tropical locales of the past have given way to more practical settings. The reasons include cost and closer scrutiny on companies and how they spend their money.

Two of the many Indiana destinations are the Rawhide Ranch near Nashville and the Winchester Guest House Inn, a bed and breakfast resort.

Rawhide is a 50-acre dude ranch that hosts a number of events, including corporate retreats. Where else in Indiana can one compete in the “Cowboy Olympics” with such events as the hay



The hay bale toss and horseback riding are among the team building activities at Rawhide Ranch.



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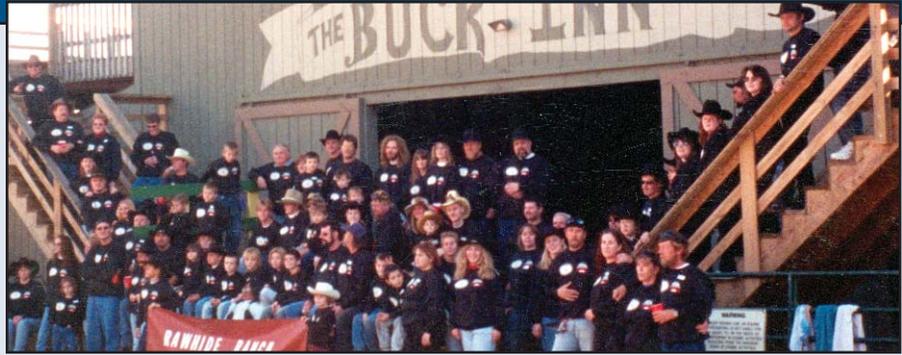
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This company's outing at the Rawhide Ranch included family members.

bale toss and tug of war? How about horseback riding, food cooked over a campfire or hotel accommodations in the "Horsetel," located above the ranch's barn?

"It's something different to do. There's not any place around here that does exactly what we do," explains manager Jenny Pennycord, adding that several business groups have returned each year since her father and his partner purchased the ranch in 2000. "Being outdoors opens up people's minds. Some companies hold their meetings, but people are still allowed to bring their families."

The Winchester Guest House offers special indoor (heated pool and spa, theatre/game room) and outdoor (volleyball, croquet, horseshoes, etc.) activities on site, with a 27-hole golf course and 30-acre wooded area nearby. Its seven guest rooms and other amenities have been part of a building process for owner Ted Davenport, who envisioned the opportunity to serve as a corporate retreat site when he purchased the facility in November 2001.

"We're too small to handle the large company retreats, but we have more facilities to offer than most," he asserts. "We offer a home kind of environment. You feel like you're at home, but the beds and meals are taken care of."

## Team approach

Retreat participants emphasize the team building aspects. Yes, there is a predetermined business agenda for the event, but the ability to bring people together yields additional benefits that are important to company growth.

Laidig Systems manufactures bulk storage and reclaim facilities for agricultural and other customers. Sales and engineering personnel are brought together several times a year, with one of those sessions focused on long-term strategy.

"At least once a year, we want to get away from the daily routine and the things that distract people," says Roger Laidig, with a portion of the event typically including a golf or fishing outing. "Just going out to eat together, playing pool, the chemistry of the team really improves. There are a lot of side benefits."

ProTrans International is a logistics transportation and management company headquartered in Plainfield. It has service centers across the United States and in Mexico. The synchronization of a new sales process brought between 25-30 members of the sales and marketing teams together. The setting was the Wilstem Guest Ranch near French Lick.

"When we were in the (meeting) room, we were focused strictly on learning. We had to work through some customer service and operational issues," relates company spokesman Craig Hare. "But we were able to leave the facility, spend time outdoors and get involved in team building."

A result was the normally competitive sales people were able to "see some unifying characteristics come out."

Borshoff Johnson Matthews is a public relations and marketing communications firm based in Indianapolis. It includes all 30 staff members in an annual one-day retreat, typically evenly divided between business (a look back at the past year and ahead to the next one) and creative, team building pleasure. Off-site facilities have included the Indianapolis Art Center and the National Institute for Fitness and Sport.

"We're one company where everyone has an opportunity to contribute, and we want everyone to feel a part of what we're doing," says partner Susan Matthews. "Teamwork is so important in how we deliver services to our clients. Getting away delivers a different feel, and we find ourselves working together in different combinations."



A kitchen, game room and big screen TV are among the amenities that make visitors to Winchester Guest House Inn feel like they are at home.



### Creating success

Goldsby, the Ball State professor, consultant Davis and trainer Roberts offer their viewpoints on successful retreats. Among the key points: plan ahead, make sure there is open dialogue, use an outside facilitator when appropriate and ensure the proper follow-up takes place.

“You’ve got to have at least a general idea what you hope to get out of the retreat,” Goldsby reiterates. “You may not get as much buy-in or (you may) lose valuable time if you don’t plan ahead of time.” There is a slight concern with overplanning, if new and creative ideas are among the objectives. “You don’t want to shut people off until you see where things are going.”

The professor adds that companies have to know their people when determining a location. A ranch or isolated atmosphere may be relaxing to some, but stressful for those who thrive on contact with others.

Davis offers two locations she has used – Indiana University-owned Bradford Woods for its casual, relaxed atmosphere and outdoor activities, and the Indianapolis Arts Center for its “creative feel” and variety of locations for small breakout groups.

“Companies that are successful recognize the benefits. Even though they are busy, the leaders say, ‘We have to get away – consistently,’” she contends. “Ones who say, ‘Oh, we can’t do it this



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**Experts caution not to underestimate the value of good food and camaraderie (at the Winchester Guest House Inn here) during company retreats.**

year,' they may end up paying for that down the road."

The retreat work, she says, begins well ahead of the event and continues after the participants return to the workplace.

"If it's not well planned, that can set the tone. Be clear with people exactly what you hope to achieve. Tell them why you're taking time out of their busy day and get those people participating involved beforehand.

"It's very helpful to have an outside facilitator, one who can be a neutral party," Davis continues. "If it's a planning session, you're going to leave with some kind of action plan. It means the real work lies ahead. That is part of the whole process."

Roberts may be a sales trainer and consultant, but he realizes getting the job done effectively is all about people. The goals, quotas and numbers that salespeople live with every day have to take a back seat when it comes to retreat time.

"The good companies, the ones that have the right attitude, the right culture, they're not afraid of the economy being down. They're willing to forge ahead; they want to make a difference," Roberts exclaims. "These companies have a high AQ – adversity quotient. They're willing to take risks. They say, 'No, this is the perfect time. Others are cutting back. We're moving forward.'"

The difference between "wallowing in mediocrity and thriving in abundance" is spending money on human capital. Retreats are part of the equation, through developing a theme, sticking with it and building people up. That responsibility often falls to Roberts or others who serve as the facilitator.



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“You want an environment that is safe for bringing up ideas. I call it ‘holding them safely.’ You want to be deliberate in listening, pay attention to strengths and let humans flourish,” he asserts. “You must be successful in getting contributions from everybody and letting them know the playing field will be level. The good facilitator only talks about 20% of the time.

“Legendary companies have a culture and that culture is always about people,” Roberts concludes.

Making the commitment. Planning ahead. Securing the right location for your company. Creating an open environment. Following through on the plan developed. Do all of these and your company’s retreat will be on the road to success.

#### INFORMATION LINK

**Resources:** Mike Goldsby, Ball State University, at (765) 285-5320

**Andrea Davis, FlashPoint, at (317) 229-3035 or [www.flashpointhr.com](http://www.flashpointhr.com)**

**Tim Roberts, Effective Selling Methods, at (317) 845-0041 or <http://effectiveselling.sandler.com>**

**Rawhide Ranch at [www.rawhideranchoutfitters.com](http://www.rawhideranchoutfitters.com)**

**Winchester Guest House Inn at [www.winchester-inn.com](http://www.winchester-inn.com)**