

Bolder Technology, Inc.



Facilitated Planning Retreat

A special offering of BTI is the Facilitated Planning Retreat. The retreat is a three-day work session designed to explore the emerging technology trends and to identify their implications to your marketplace.

Through a carefully designed set of activities, the planning retreat allows your group to understand and internalize technology and industry changes, define the critical issues, search for alternative solutions, and formulate a concise action plan. The retreat pulls together three key elements: our combined expertise and experience, your knowledge of your organization and its capabilities, and quality, focused time to identify strategic directions to pursue and an action plan to pursue those directions. Leveraging his thirty-years of industry experience, Dr. Richard Hackathorn, president of BTI, will be the retreat leader to insure the desired outcomes.

Benefits

A Facilitated Planning Retreat provides the following benefits:

- Quick identification of assumptions, issues, and challenges
- Creative generation of solution alternatives
- Concise, focused action plan
- Quality, uninterrupted think-time
- Customization to your unique situation

These benefits are achieved by blending BTI's expertise and experience with your industry knowledge through professional facilitation.

Objectives

The Facilitated Planning Retreat is focused on you and your company achieving the following objectives:

- Clear statement of the issues and the priorities for those issues
- Opportunity for all members of the group to voice their ideas and opinions in an open and safe environment
- Building of group consensus on the issue definitions and their resolutions
- Clear listing of the action items, initial plan of attack for each item, and who is the steward of each item
- Forceful commitment to help drive the action items. This is not a one-shot event, but the initiation of a sequence of on-going strategic initiatives.

Typical Agenda

During the morning of Day One, attendees arrive at the lodge and get settled. The afternoon session reviews relevant background information and sets the agenda and objectives. During this session, the changing market and technology trends are identified, and the capabilities of your company are examined.

Day Two is a full workday during which issues are surfaced, solutions are brainstormed, and priorities debated.

The morning of Day Three brings closure by formulating an action plan with specific next steps, individual accountability, timeframes, and milestones. Attendees depart in the afternoon.

Spreading the work sessions over three days provides quality time in the evenings to reflect on the day's discussions and craft innovative solutions.

Prior to the retreat, Dr. Hackathorn prepares the objectives statement and detailed agenda in close consultation with your company. They focus on the above agenda to ensure that the critical issues facing your organization are surfaced and addressed. The appropriate BTI analyst prepares any additional background research needed to facilitate our discussions.

Facilitated Retreat

These are professionally facilitated sessions. Our facilitator is Dr. Craig McGee. He has over twenty years of Organizational Development experience conducting hundreds of similar planning retreats. Dr. McGee has spent his career helping organizations like yours identify strategic shifts required and proactively develop the plans and capability to remain a leader in their respective fields. His clients include Sybase, IBM, Xerox, and Hewlett-Packard.

Pricing

Upon request, the fee for this service will be determined depending on number of participants and several other variables. This fee includes the BTI staff, Dr. McGee, and the conference facilities (as described below), and supporting custom research.

Facilities

The planning retreats are scheduled at one of the quality lodges in the Colorado mountains. For example, the [Aspen Lodge](#) is located seven miles south of Estes Park and offers meeting rooms with excellent views of Longs Peak. The new [Lake Shore Lodge](#) is a three-story log structure, with vaulted ceilings and wrap-around decks, on the shores of glacier-fed Lake Estes.

Accommodations include quality rooms, gourmet meals, full bar and exercise facilities in a rustic setting. The package covers the room, meals, breaks, and meeting room. The client is responsible for travel and incidental expenses, such as alcoholic beverages, telephone calls, horseback rides and the like.

