A BrightHill Group
Special Report 2023

HOW TO CONVINCE YOUR BOSS TO FIND THE BUDGET FOR

A TEAM OFFSITE RETREAT

Bright
Hill group.com

Welcome

I'm excited to share this special report:

How To Convince Your Boss To Find the Budget For Your Team Offsite Retreat: Your questions answered.
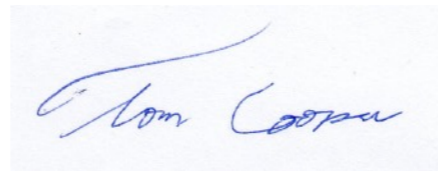
As I have worked with leaders and teams since Covid, I have seen two key themes emerge:

1. Teams are constantly challenged to do more, and after all these years of "*Do more with less,*" team members are more disconnected than ever and feeling burned out. And

2. While organizations often have no specific team building budget defined, it's clear that teams with more communication, trust, team work and collaboration produce more, have better employee retention and have happier team members.

Based on updated research, this report examines the challenges that companies are facing and discusses ways that teams like yours can find the funding to take the next step to invest in a team building retreat that will help your team members and your boss.

In today's marketplace, where more than 70% employees are significantly disengaged & more than 50% of managers are experiencing burnout, **it is difficult to retain top talent.** Particularly in cities where team members are consistently in demand, building a work environment that supports team cohesion and cooperation is more important than ever.

Tom

Principal Geek - BrightHill Group 240-668-4799

2

Executive summary

Executive summary

> "*Taking no action is often the most expensive option of all.*"
> — Ken Blanchard
> Author: The One Minute Manager

Why Do We Need To Invest In Our Team?

Post Covid, more than 50% of managers are suffering from burnout. During the pandemic, productivity among knowledge workers soared, but that can only last so long, and now three years later, we are seeing more and more team members overwhelmed and disengaged.

Worse, often teams are not led by and filled with team members who are highly skilled at teamwork, communication, collaboration, and healthy team habits.   In fact, many times companies promote the best team member to a management role.
　　The best accountant becomes the accounting manager.
　　The best engineer becomes the lead engineer.
　　The best developer becomes the software manager.

The problem with this approach is that hands on technical work and leading people require two different skill sets. Often the great individual contributor turns out to be a lousy manager. This is the worst-case scenario. You have THREE sets of unhappy people: The top performer is now doing a lousy job and hates it. The team is led by a person who demoralizes them, and the company loses because team performance goes in the dumpster.

Your team members need high trust, great communication and effective conflict resolution skills. And there is good news: *Team retreats help build all of those!*
Setting aside time for your team to step away from the daily grind and really connect with each other can have significant impact. Team members will be happier, and you'll get more done. Higher quality work, less rework, more projects done on time, and with less staff turnover, too. It really is possible!

How Do We Know It Will Work for Our Company?

Research shows that team building can have a positive impact on productivity and morale. Team building activities have been proven to bring people together, help foster collaboration, increase engagement in the workplace, reduce conflicts between colleagues, develop problem-solving skills, create better communication between team members, and create an atmosphere of trust and support.

This will work for YOUR team because we will create a customized "done for you" experience that team members will enjoy while growing trust within the team.

How Much Will It Cost?

What kind of results do you want? In "The Costs" section I go into detail about the potential ROI you can get from strategic investments in team development.   Great programs may be as inexpensive as a few hundred dollars per participant all the way up to customized team retreats of several thousand dollars per day.

The more time and effort your team and leaders can commit to the process, the more results you'll see from your investment!

According to the Association for Training and Development, most organizations spend about $1,208 per year on programs for team members.
High achieving companies spend more. (And we can talk about high value programs that can cost far less than that, too!)

How Will we Know When We Have Found the Right Provider?

The best programs are simple for you and your team members. They offer a PROCESS, not another PROJECT for you and your team.
Great programs are based on the needs of the adult learner and include the motivation (WHY) the skills (HOW) AND include triggers or reminders to USE the skills from the training.
This is a key difference from traditional programs, and it makes a huge difference.

Finding Budget For Your Team Retreat

- Executive Summary
- The Problem
- Your Questions
- Your Boss
- The Costs
- Conclusion

References
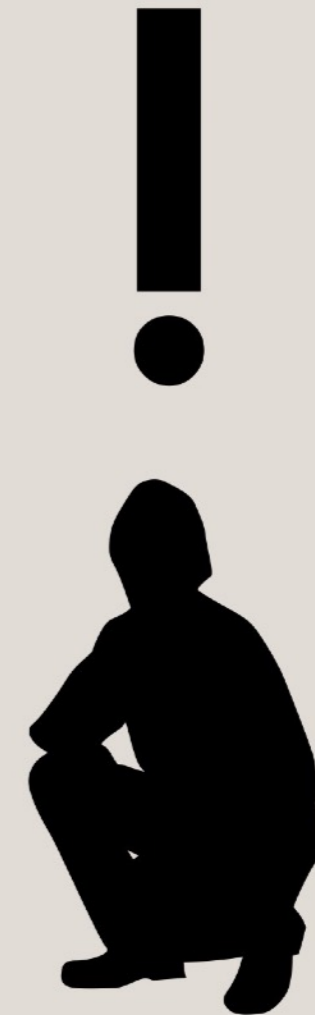
The Problem

THE PROBLEM:

TEAM MEMBERS HAVE BEEN PRODUCING SO MUCH FOR SO LONG WHILE ISOLATED THAT WE ARE SEEING AN ALARMING INCREASE IN BURNOUT IN KNOWLEDGE WORKERS

TEAM MEMBERS AND MANAGERS EXPERIENCE

BURNOUT

- Job demands exceed human capacity
- Role conflict - pressure from all sides
- Lack of recognition
- Lack of support from manager or team
- Workload or work policies seen as unfair

76% of employees say they'd stay longer if they had more training and support
— Microsoft report

65% of surveyed tech employees reported they have considered leaving their job due to stress
— VMWare study

Managers and teams have all had to massively re-think ways of working over the last few years. Largely we have performed well, but not without a price. Remote work adds flexibility, but also ambiguity. Corporate leaders worry about tracking productivity and team members struggle to find the line between work time and non-work time. This adds stress.

WITHOUT TIME TO WORK ON TEAMWORK

EVERYONE IS UNHAPPY!

Without team building

Team members struggle with isolation, stress, anxiety, and lack of career progression.
It can also be difficult to build trust and effective communication between team members.

This can lead to lack of collaboration, increased conflicts between colleagues, decreased engagement in the workplace, and poor problem-solving skills.   Unhappy teams have high turnover, low productivity and high stress.

It's just the wrong recipe for creating great results.

Making the time for a retreat like our software offsite retreats give employees the opportunity to take a break from their everyday routine and learn new skills while networking with peers in a comfortable environment.

With Team Building

These activities provide an opportunity for employees to bond and learn how to work together more effectively, which can improve job satisfaction and productivity. All these benefits translate into higher performance outcomes for businesses who invest in team building initiatives.

> There's no team without trust
> — Google's Paul Santangata

TEAMS DON'T DEVELOP GREAT TEAMWORK WITHOUT SUPPORT

"IF YOU TAKE AN ENGINEER AND YOU WANT TO TURN HIM INTO A LEADER IN AN ORGANIZATION YOU CAN'T JUST ASSUME THAT YOU PROMOTE THEM AND THEY WILL LEARN OVER TIME HOW TO BECOME A LEADER. SOME OF THEM WILL. THE VAST MAJORITY WON'T."

DR. PETER BAMBERGER

Your pressing questions

Your questions

How much will it cost?

So you're convinced that the problem is real, and you buy into the idea that the company is going to have to make an investment - but… how much is it going to cost?

It depends on the amount of return on investment you want to get from the program. The more time and energy that your team members can commit, the more likely you are to see significant benefits. The "the costs" section later in this report helps you understand the typical costs for customized programs and executive coaching based on current industry research.

If the conversation is only about the costs, and not on the expected benefits and return on investment, it's going to be a lot tougher to get the buy in you need from your leaders.

CFO: *"What if we spend money on this retreat and people leave?"*

CEO: *"What if we don't, and they stay?"*

## How can I convince my boss to spend that much?

This is where the rubber meets the road. Too often money spent on training programs yields little measurable benefit. Worse, many times there's no perceived improvement in team actions or results. Because of this, some leaders are reluctant to spend money on training, particularly if they have not consistently done this in the past - and have little or no budget allocated to train the team.

How your boss thinks
Typically, executives tend to ask the following three questions when presented with a spending decision:
1. Why do we need this?
2. Is this approach going to work?
3. Why work with this provider instead of someone else?

When you come prepared to answer these questions, you're much more likely to get them to say yes.
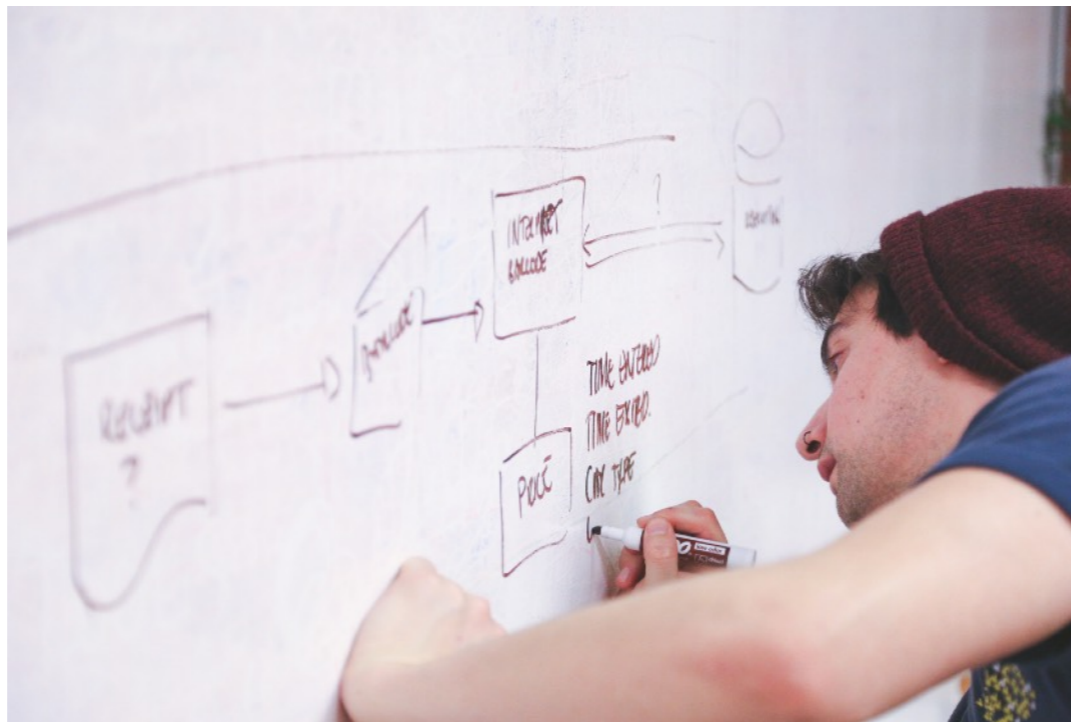
Executive Summary

The Problem

Your Questions

Your Boss

The Costs

Conclusion

References

Your Boss

Your Boss

1. Why do we need this?

Organizations that implement teamwork well are 40% more effective than those who do not.

— ICESI University research

1. **Why do we need this?**
   What is it costing you today?

Overwork, stress and burnout is deadly to team morale and team productivity

More and more we are seeing teams overwhelmed and exhausted.
Rework, waste stress, burnout - all reduce productivity and lower job satisfaction - it's a vicious cycle.

For software teams, the cost of losing a great employee - known as "regrettable churn" - is a minimum of 100% of salary (G&A Partners research)

Can you afford to lose a key player?
Eventually the ones with the best options often opt out. This leads to a loss of tribal knowledge, cost of recruiting, no productivity till you find a replacement, the impact on team morale, low productivity as the new person comes up to speed - these expenses go on and on.

We can support you and either reinforce teams that already have a great core, or we can build trust within one of your struggling teams. The question is not so much *"How much does it cost to fix it?"* as it is *"What is it going it cost us if we don't fix it now?"*

Sure, you can keep doing what you've been doing, but what is that costing you?
How much more can you afford to spend by continuing the path you're on?

When teams exhibit honest feedback, mutual respect & personal openness, team members were 80% more likely to report higher emotional well being.

— Atlassian Research

The #1 reason team members report *"going the extra mile"* is for those who have the respect of their peers

— TinyPulse survey on engagement

52% of voluntarily exiting employees report that their manager could have done something to prevent them from leaving.

— Gallup

 Executive Summary

 The Problem

 Your Questions

 Your Boss

 The Costs

 Conclusion

References

Your Boss

2. Will this work for our team?

> *"If your organization values employees, it's not too much of a leap to see how investing in your employees will make a stronger organization."*
> - Jessica Rohman

2. Is this going to work for us?
How will we know?

The fact is that *cookie cutter approaches don't work*.
Your organization has a unique culture and work style.
You need a program designed to fit the needs and preferred approaches of your team, and one that fits with the schedule and priorities of your team.

Measurable results
Great programs are action-oriented. They focus on individual action plans with measurable outcomes. They offer mechanisms where participants can easily share their action plans with their managers and the mangers and the company can see changes in behavior based on what they are learning.

A process, not another project
A great provider can deliver a system that makes it simple for you and your team. They will bring a proven process for equipping people that lets you focus on your business without having to become an expert in training and development.

Accountability - it works!
Personal accountability is the key to successful change. A great program sets team members up for success with personally set goals. Participants hold themselves accountable to the goals. The provider holds them accountable and the team can create shared accountability through group coaching sessions

Leaders ask:
1. Why do we need this?
2. Is this going to work for us?
3. Why should we go with this provider instead of someone else?

Companies with Team Building Programs

23% improvement in productivity

14% increase in market capitalization

50% reduction in defects

20% reduction in inventory
— Harvard Business Review

Your Boss

3. Why work with this provider instead of someone else?

> *"Are you developing people, or 'sending them to a class?' If you want to see real, and significant improvement, you'll focus on real development of your team members.*
>
> - Tom Cooper

**3. Why work with this provider instead of someone else?
What to look for**

Are they a "fit?"
Does this provider connect with you and with your people?
Does the process plug into your company's needs and expectations?
Do you and your team members feel comfortable communicating with the provider and their team?

A track record of success.
Great providers should be able to provide a list of happy clients.

A process that makes it simple to succeed.
Does their approach let you focus on your strengths during the process?

A guarantee of satisfaction.
What will they do if you're not satisfied? Are they confident enough to offer a money-back guarantee?

Will they hold you, the boss, accountable too?
Leadership programs that do not have the full support of senior leaders are far less effective. Will your provider hold your feet to the fire to challenge you as the boss to be engaged in the process, look at results and connect with the participants about what they are learning?

Leaders ask:
1. Why do we need this?
2. Is this going to work for us?
3. Why should we go with this provider instead of someone else?

> *"Leadership and learning are indispensable to each other."*
>
> - President John F. Kennedy

> *"Leadership is not a gene & not a secret code…Leadership is learnable."*
>
> - Professor Barry Posner

Sidebar Navigation

- Executive Summary
- The Problem
- Your Questions
- Your Boss
- The Costs
- Conclusion
- References

Executive Summary

The Problem
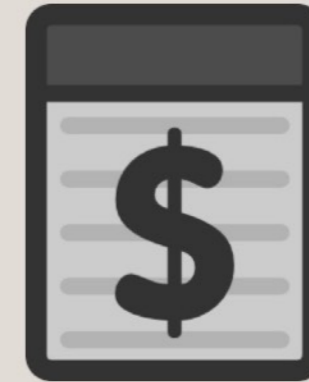
Your Questions

Your Boss

The Costs

Conclusion

The Costs

The costs

If you don't expect a return on investment when it comes to team development, you're making a bad business decision.
— Tom Cooper

What kind of ROI is there, really?

It all depends on the commitment your teams make to grow. When team members are committed, you can see amazing results.

Successful programs consistently seen great results from committed team members and leaders who are engaged in the process.

Outcomes include better relationships, more efficient work within and across teams, better and faster communication and higher trust. And those are just the results that can't easily be measured.

When it comes to dollars and cents, studies show that investment in teamwork and executive coaching REALLY pays off.

A study published in the journal Leadership Quarterly said that the return on investment for leadership training was up to 200%.

And what about the coaching aspect? A 2001 study published in the academic journal The Manchester Review found that executive coaching can deliver a return on investment of 700%!

Up to 200% ROI for leadership training with an average of 140%
— Leadership Quarterly

Up to 700% ROI for executive coaching, with an average of 570%
— Manchester Review

The costs

> "*Most organizations operate with a 5-10% loss of productivity that could be eliminated by having better leadership skills.*"
> — Saratoga Institute

What is the cost of doing nothing?

When it comes time to think about investment, it's easy to over look the hidden costs of taking no action at all. We've shown that there are real and tangible hard benefits to developing your team members, and there are "soft" benefits, too. If you do nothing, what will it cost you this year?

Is leadership development expensive?

You want the best provider to bring your team great results, right?

You want to say to your team: *"We searched for the best trainer we can find, and we are making an investment. We expect you to participate and take full advantage of what we're investing in you."*

The question you have to ask is:

How much ROI would make it worth it?

How much are you spending today on payroll for your managers?
What if your return was "only" 5-10% of that - clearly demonstrated in their increased productivity, and the productivity of their team?

How much *should* you spend on this?

When you think in terms of the return on investment, consider whether you're spending enough.

The trend has been increasing over the last several years. **In 2013, companies spent $1,208 per employee** for general training for their teams. And high performing companies tend to spend more.

When you want to get great results, you need to be prepared to invest the right amount of time, energy and money. Your competitors are investing - are you investing enough to make a real difference?

What kind of results do you want?

Figure 1. Average Direct Expenditure per Employee

Year	Amount
2013	$1,208
2012	$1,195
2011	$1,182
2010	$1,228
2009	$1,081
2008	$1,068
2007	$1,110
2006	$1,040

Source: ATD

> "*High performing companies spend more*"
> — Forbes Magazine

Options and Investment

Team Dynamics with DISC

Do you know how you work? Really? Did you know that people are different, but predictably different? We can deliver a Team Dynamics with DISC workshop - for just $250/person.

Leadership Communications Workshop

An incredible option for your team is a workshop based on the John Maxwell Team Leadership Game. It's an immersive experience driving communication, laughter, and serious topics that drive connection between team members. Teams of up to 10 people. $300/person.

Process Design Workshop

What if your team had a tailored, efficient process in place to support your development work. Team members all on the same page about steps in the process, tools to use, and supporting them in the process of scaling development to maximize the team's potential. *"Slow is smooth, and smooth is fast"* $4995/day

Software Team "Calibrate" Workshop

What if your software team was *really* calibrated with agreements about roles, responsibilities, culturally sensitive communications, tools, processes, product and software lifecycle, and agile practices?

What if we could do that all in less than a week, while leaving time for "real work" too?
It's amazing how much efficiency your team can gain, and it can pay for itself by helping you deliver just one sprint faster than you would have otherwise. This is an investment that keeps on paying you back. Includes detailed pre-workshop interviews and assessment, custom workshop and post workshop accountability session to demonstrate progress. $29,995

Customized Team Trust and Teamwork Workshop

We can plan a customized workshop specifically focused on your team's needs, with content and exercises specifically targeted to your team's needs. Professional facilitation, a wonderful experience, great memories for the team. Starting at $6,995 for a custom one day onsite workshop.

> "*High performing companies spend more*"
> — Forbes Magazine

Conclusion

Conclusion

Executive Summary

The Problem

Your Questions

Your Boss

The Costs

Conclusion

References

It's Time to Invest in Your Team

In this competitive marketplace, it is a challenge to find great team members and leaders who can help your company compete in the marketplace with great products and services.

Even when we have teams in place, we sometimes struggle, and yet we know that building better teams will yield benefits like:

Improved trust
Better, healthier risk taking
Productive conflict - not just arguments and disputes, but better solutions and better teamwork
Leveraging diverse strengths across the entire team
Improved creativity and better learning
More ownership, engagement and accountability

It is Worth Your Investment

Studies show that making the right investment leads to better financial performance, reduced turnover of team members, better team retention, and a happier workforce.

Your competitors are increasing their investments in team member development - and your employees know it. So-called high potential or future leaders are hungry for growth. Given the opportunity to be a part of an organization that really invests in team members, they may opt to go elsewhere, lowering your capabilities. What's worse is that "A" players attract other "A" players. "B" players tend to recruit "C" players.

Retaining the best team members, and equipping them with leadership skills can lead to great business results!

References

Forbes Magazine "Spending on Corporate Training Soars"
http://www.forbes.com/sites/joshbersin/2014/02/04/the-recovery-arrives-corporate-training-spend-skyrockets/#412f2ac14ab7

ATD - 2014 State of the Industry Report
https://www.td.org/Publications/Magazines/TD/TD-Archive/2014/11/2014-State-of-the-Industry-Report-Spending-on-Employee-Training-Remains-a-Priority

Saratoga Institute
Branham, L. (2005). The Seven Hidden Reasons Why Employees Leave. New York: American Management Association

Manchester Review
http://www.coachfederation.org/includes/docs/049ManchesterReviewMaximizingImpactofExecCoaching2.pdf

Leadership Quarterly
http://www.uwtv.org/fosteringleadership/docs/roldleaqua650.pdf

Harvard Business Review - The Top Complaints from Employees About Their Leaders
https://hbr.org/2015/06/the-top-complaints-from-employees-about-their-leaders

Wall Street Journal - Gallup study
http://blogs.wsj.com/atwork/2015/04/02/what-do-workers-want-from-the-boss/

Harvard Business Review: Two-Thirds of Managers Are Uncomfortable Communicating with Employees
https://hbr.org/2016/03/two-thirds-of-managers-are-uncomfortable-communicating-with-employees

Harvard Business Review: Does Management Really Work?
https://hbr.org/2012/11/does-management-really-work

Journal of Leadership Education
http://law.scu.edu/wp-content/uploads/leadership/Journal%20of%20Leadership%20Education%20March%202009(1).pdf

Tom Cooper - Principal - BrightHillGroup.com - 240-668-4799