

## Virginia Council of CEOS

### Roundtable Retreat Examples

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#### **Roundtable 14 (Michael Falcone)**

##### 2014 Retreat

Oct 28 everyone flew as a group flew to NY (except myself I was in NY already for work) to

Oct 28 we gathered for a power lunch at Delfrisco Steak located across from Radio City Music Hall. We had a private room in the back where we held our round table meeting brief. This allowed us to be in a different environment and opened up everyone to an exciting social level as well as business. Approx 1 to 4 pm

Oct 28 4pm I guided everyone down Madison Ave on to 5th Ave as a group. At this point we all went to the NBC building 30 rock. Afterwards we walked 5th Ave and even attended a brief at St Patrick's Cathedral. Many in the group had not been to Manhattan or it had been a very long time. Many real estate conversations at this point took place :)

Oct 28 5pm We walked over to Central Park then the Plaza Hotel in which toured the hotel and Todd English Food hall

Oct 28 5:30 We gathered for drinks at the Ritz Carlton Central Park where we discussed current activity, the good the bad the ugly at work. This was enjoyable again in a different environment which allowed us to discuss every level of activity going on in our work place.

Oct 28 7:00 pm We gathered at Madison Square Garden (I have a lux box) Stephen Gould Box was a great treat to everyone. The box was catered with open bar and waiter service. Everyone loved the game! The night was fantastic. We agreed a must do again!

Oct 29 I took a 6:00 am flight to Bentonville Arkansas and the group gathered at the Brooklyn Dinner (my referral) for breakfast. Here is where they sat next to Jerry Seinfeld. Exciting trip!!!!

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#### **Roundtable 10 (Bryan Mueller)**

Our group has done a retreat every year. We start with a group activity. One year it was a golf outing the afternoon before the retreat (everyone participated even though everyone isn't a golfer). Last year we stayed at Lake Gaston and spent the day on the lake. We have done dinner in that last 2 years. It was great bonding time cooking together.

At the retreat we have done get to know each other better exercises. We have done a life time line where each of use identified our life's highs and lows. We have done an exercise where we discussed life changing/direction decisions we made in our life and would we have done something different. We also did a personal goal setting exercise where we planned out our next year, 5 years, and 10 years.

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### **Roundtable 5 (Tom Ficklin)**

Tom Ficklin, Roundtable 5

We have done three.

- One was on a strategic topic that one member had questions about. So that person put together a comprehensive presentation, that we all questioned and dug into – no advice.
- Another, we all brought PowerPoint presentations about our company and our strategy. The others questioned (for understanding and clarity) our strategy – no advice. There was great value in the process.
- The third was...well, maybe not as eventful, but I can fully assure you we had a good time. We had new members so we were looking to bond as a group. All intro type stuff.

WE absolutely have a great time everywhere we go. Two, we have taken great food, (and maybe some alcohol, although almost 25% of our group does not drink), prepared it together, relaxed and played games (be careful of beginners who play poker and are not drinking) on Friday night. Sat am, breakfast fit for royalty (knowing you are a huge fan of early morning breakfasts), again, that we prepared. Then we had an extended session (9-2ish) to address the issues at hand. We try to be home by supper time on Saturday. The third, we obtained unbelievable rates at a nice resort.

The last time, we had no phone service, no TV, and I had a roommate that snored. Great accommodations at Bear Creek Lake State Park.

We have never used a facilitator, so I am unable to comment on that addition to the dynamic of the group.

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### **Roundtable 12 (Mark Creery)**

We have done four retreats in my four years as member of RT12.

#### **2011**

We rented a house for 2 days in Louisa/North Anna

We began using the retreats as an opportunity to do an hour long business presentation to the group. The presentation is what you might expect to do for a bank or investor prospect. “Tell me about your business in 45 minutes. What are you doing, how well have you done, what can I expect in the future?”

Our members prepare a one-page business profile (Excel template) that covers:

- Company vision and elevator speech
- Current and past year financial snapshot (P&L, Balance Sheet, and Valuation)
- Organizational changes in past year
- SWOT analysis
- Next year strategies
- Obstacles

The value of this is:

- Provides context for discussions/presentations during the coming year
- Allows for past year’s tracking (as demonstrated in future years)
- Provides opportunity for feedback (Gestaldt on-hold)

We had scheduled Mo for one of our monthly meetings for a “tune-up” earlier in the year. We hired a business coach to help prepare our presentations and facilitate the meetings.

Retreat activities included an extended afternoon hike, a big dinner (Paella), poker/drinks/billiards, and one member presentation. We also use our retreats to formally thank our leader for the past year of service and have gotten in the habit of having branded RT12 gifts for ourselves (lighters, pocket knives, etc.). We also elect the upcoming group leader.

## **2012**

Similar program to 2011. 2 days again – slightly longer duration.

We held it at a member’s vacation home about an hour away.

Mo facilitated a member presentation, team building, and covered Five Dysfunctions of a Team.

We did not think the 2011 coach added much to our process, so we self-facilitated our business presentations using a similar format as in 2011. We had the benefit of the prior year for comparisons.

Similarly, retreat included an extended afternoon hike, a big dinner (pasta with meatballs), barbeque, poker/drinks/billiards.

## **2013**

This was a breakout year for our retreats. We had won the membership drive campaign for VACEOs and had \$3000 to cover expenses. So, we went a little crazy. This ended up being 3 days over a weekend at a DC hotel.

We traveled to Washington DC for retreat/recreational/team building activities. Unfortunately, the trip fell in the middle of a Fed Government shutdown, so some activities had to be swapped out (i.e. a visit to Senator Warner's office.) Nevertheless we:

- Visited the Newseum (newspaper museum)
- The Kennedy Center
- Took a Potomac Boat Tour
- Had a nice, formal, dinner out (3-4 hours – great time)
- Took a long hike

We also self-facilitated our annual business presentations. This has become pretty smooth and effective.

2014

We again won the VACEO membership drive, so we had some expense money.

We rented a house in Sandbridge Virginia for 2 nights. Activities included:

- Trip to Norfolk shipyard for tour of docked Aegis Cruiser
- Business presentations (again self-facilitated)
- One in-home cooked meal (clams casino/veal parmigianino), one at a nice restaurant

Our retreats have become great bonding events, useful business review opportunities, and provide a solid framework for an effective monthly meetings.

We use survey monkey before and after each retreat to gather RT input and process improvement. We form a 2-3 member retreat committee to handle the planning. In addition to the financial support from VACEOs, typical expenses covered by our RT run about \$250 each year.

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### **Roundtable 3 (Buck Robinson)**

We've made great use of members' river and beach houses over the years. We've also made sure to have a great balance of actual business and a lot of fun/bonding.

Four years ago, we went to one of the member's river houses and had a fantastic time working with a professional facilitator on Thursday and Friday afternoon on development of personal management skills. Both nights, we had a private chef come in to cater dinner and we got ourselves into just enough trouble to make things very memorable (without enough physical evidence to get anyone indicted).

Then last year we went to a member's beach house in the OBX and had a full day of workshops facilitated by Steve Kimball from Tuscan Advisors - he helped us really get "out of the weeds" and to develop BHAG 5-year goals for our companies (and ourselves). That was followed by a relaxing day of fun on Friday before heading back to RVA on Saturday.

Our general structure has been to arrive on a Thursday afternoon, have a group meal that night (usually catered), work with the facilitator the entire next day, raise Hell that night, and then drag ourselves back to Richmond on Saturday.

V.2015A

This year, we're looking to rent a big place up at Wintergreen and taking advantage of the proximity of many a local winery/brewery - we're also switching things up and making it a Weds-Fri affair due to schedule conflicts on the weekend. We're still working on who we want as our facilitator this year, but we do like the discipline of having someone come in to run the show on our "work" day, rather than trying to leave it to members to handle the training/program.

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### **Roundtable 1 (JJ White)**

In October 2014 we went to Bath County and stayed at a farm house (a very nice one that sleeps 10) near The Homestead. It was owned by a friend of a RT member.

There are many group activities to do through The Homestead. We went to shoot skeet (a great stress reliever) and went on a hike near the James River. For breakfast and dinner we made each other meals. Of course had a bonfire out back and adult libations. Another highlight was traveling in different groups to and from the retreat. It was a fantastic bonding experience.