



IGNITE SERIES

# Strategic Planning Retreats

*Accelerate  
your strategic  
planning process*

[fathom.net](http://fathom.net)

[brentr@fathom.net](mailto:brentr@fathom.net)

**860.463.4661**

*A strategic retreat designed to unlock a powerful vision and develop the relationships to make it a reality*

Traditional approaches to strategic planning often leave the majority of your team's potential unexplored and unrealized, because they:

- (1) only invite your team to explore what they already know,
- or know how to do (2) are based on the idea that your organization is or has a problem that needs to be fixed (3) focus on processes and actions, and almost completely ignore establishing critical relationships and agreements (4) Culminate in a document that occupies shelf-space instead of provoking your teams' imaginations and actions.



# When strategy becomes fuel for your future

**Fathom's approach to strategic planning retreats is centered on the idea that visioning and planning for the future is a distinctly creative and human act.** Because of that, we put your people's ability to imagine and act on what matters to them and your organization at the center of the experience. As a result, your team won't just plan your future, they will be ready and motivated to bring that future to life.

## Organizations who will get the most out of this have:

A leadership team committed to creating an organization that realizes extraordinary performance while enhancing its ability to have a positive and meaningful impact on the lives they touch and communities where they work.



### You will define

**The greatest opportunities** to move beyond existing benchmarks and what your history says is possible

**What makes your organization unique**, where your unique value comes from, and to whom it should matter most

**Clear priorities for where to invest** energy that will make the biggest difference moving your organization forward

### As a result you will

**Experience a new level of enthusiasm** for and a clearer path toward your ideal future

**Be more confident and decisive**, knowing your team collectively created and endorsed your strategy

**Be closer and more connected with your team** by knowing what really matters to each person, and what everyone is committed to contributing

## Logistics & format:

Retreats can take place over a single day, or multi-day timeframes. A typical strategic retreat agenda would include:

### PART ONE

#### ***Establishing vision for the future***

The first session focuses on introducing a multi-dimensional framework to think with, and to use it to reveal where you stand, the ideal future you seek, and a powerful reason to invest in pursuing that future.

### PART TWO

#### ***Reflection and engagement***

Over dinner, we continue the conversation to further discover new insights, to address doubts and to come into a deeper relationship with the vision for the future.

### PART THREE

#### ***Integration strategy***

With refreshed minds, we focus on how to best integrate the strategy into the culture and behaviors of the firm and wrap up with clear agreements and accountabilities to move forward.

Each workshop results in a beautifully designed report that captures the key insights, strategies, experiences and actions created by the team in a way that can be powerfully shared with your whole firm.

## First hand experiences

*"I've participated in a ton of these types of working sessions and that was easily the best and most meaningful facilitation I've seen yet... I've been exposed to a lot of people who "claim" they can do what you did today, but many fall flat. You are very good at your job!"*

*"Brent's enthusiastic leadership - helped us get beyond the typical "what can we do" thinking to "what's truly possible" for our organization. We left the session energized and excited about our future; with some practical next steps to keep the momentum going."*

*"No matter what kind of engagement you take on with Fathom, you will most certainly leave with renewed passion for, and a clearer path toward, your ideal future."*

#### **Jamie P. Barr, LEP**

Vice President,  
Langan Engineering

#### **Karen Clarke**

Executive Director,  
Conscious Capitalism  
Connecticut

#### **David Urbanik**

COO,  
Halloran & Sage

# Fathom accelerates growth by elevating humanity



## We believe

**Organizations that are driven** by ideas greater than what they sell or make outperform those that aren't

**Every organization possesses** the courage to choose and the power to create a more meaningful future

**Organizations have a responsibility** to use more of their humanity to connect and serve more of humanity

## Which drives our approach

**Connect your team** to the ideas and ambitions that stir your imaginations and provoke not just a willingness, but a desire to change and grow

**Enroll your entire organization** in the work of bringing those ideas to life through unified enthusiastic action

**Develop the tools, relationships, and habits** required to make transformation sustainable, no matter how busy you are with the demands of today

*Find out how Fathom can accelerate your strategic planning process*

[fathom.net](http://fathom.net)   [brentr@fathom.net](mailto:brentr@fathom.net)   **860.463.4661**

## Strategic planning for boards of directors

Do you have a board of directors? Would you like to re-invigorate their enthusiasm and activity? How about establishing a higher performing and more satisfying relationship between the executive leadership team and the board? If so, ask us about our extended board/leadership team retreats.