Category

Strategy

Strategy Offsite & Board Alignment Workshop Playbook

A facilitator's run-of-show for designing a strategy offsite that produces genuine executive and board alignment on hard tradeoffs, not just a well-attended slide review.

- Executive
- Intermediate
- Template Included
- Workshop Ready

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- 8 minute(s)

Overview

A complete run-of-show for a strategy offsite that surfaces real executive disagreement before the room, forces structured debate, and ends in documented, owned decisions.

Why not just let disagreement surface naturally during the offsite itself?

Because seniority dynamics and the social cost of publicly contradicting a colleague in front of the board make natural surfacing unreliable — the people most likely to hold a genuine dissenting view are often the least likely to volunteer it cold, in the room, without a structure that makes doing so the explicit design of the session. The pre-offsite interviews exist specifically to de-risk that first disclosure.

Should the board be included in the pre-offsite 1:1 interviews, or just the executive team?

Include board members whenever the offsite decision requires board approval or oversight — their private view of where they think management is aligned or not aligned is exactly the kind of insight the alignment map needs, and it's rarely visible from a standard quarterly board presentation.

What if the structured debate doesn't produce a clear decision?

That's a legitimate outcome, and the decide-and-dissent process should still produce a documented interim decision — often "proceed with option A, revisit in one quarter with these specific data points" — rather than letting the offsite end without any decision at all. An explicitly time-boxed interim decision is far better than an undocumented non-decision.

How is a "decide-and-dissent record" different from just taking a vote?

A vote produces a number; a decide-and-dissent record produces a decision plus the specific, named reasoning of anyone who disagrees with it, which the team can revisit later if the dissenting concern turns out to be right. It preserves the substance of the disagreement instead of erasing it the moment the vote is counted.

How long should the strategy-on-a-page document take to produce after the offsite?

Draft it within 48 hours of the offsite closing, while the specific language of the decision is still fresh, and circulate it for a final check to attendees within a week. Documents produced weeks later tend to drift from what was actually decided as memories of the exact tradeoff soften.

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