[RETREAT TOOLS]

THE RETREAT THIRDS RULE

Forums break up over bad retreats. Plan a third, a third, a third, and folks do not come away disappointed: covered great stuff, actually got time to connect, not exhausted.

THE THREE THIRDS

1. **One third forum exercises.** Deep-dive experiences on a theme: lifelines, the 3-3-3, life wheel, letter to my future self, KPI and goal setting. First retreat, or any retreat after adding a member, must include a retrospective exercise so everybody has a shared history.
2. **One third activities.** Do something. Tour another member's business, get on the water, something active. This is where the retreat earns its stories.
3. **One third unstructured time.** Pure downtime, no agenda. This is not filler; it is where the deep conversations you seeded actually happen.

MAKING THE THIRDS WORK

DO

- ✓ Front-load the heavy exercises on day one; save downtime for the back of the trip.
- ✓ Assign homework if your forum will do it. Highest and best use: fill out the worksheet on your own time, share it together.
- ✓ Mix the three exercise families: retrospective (shared history), snapshot (where my life is now), forward (goals and future self).
- ✓ Bring a professional facilitator every other year. That is EO best practice.
- ✓ New forums: mini retreat by meeting four. Lifelines on day one, KPI and goal setting on day two.

DON'T

- ✗ Don't wing it. "We're 60 days out and I don't even know the agenda" is how retreats sour, and it should come up in clearing.
- ✗ Don't schedule every hour. A packed agenda kills the third that does the bonding.
- ✗ Don't burn retreat time sitting around quietly filling out worksheets.
- ✗ Don't drop the retrospective because "we already know each other." Vulnerability is what bonds forums; it is what makes them sticky in a good way.
- ✗ Don't run heavy exercises in the final hours and send everyone home drained.