

The Leadership Retreat Was a Success. Now What?

Retreats typically have different dynamics from regular board, medical staff, and management meetings. They provide a setting and time for reflection, discussion, and interaction among the organization's leaders. Many organizations find retreats to be so valuable that they are a regular, often annual, event.

On one level, the retreat can be considered successful if there are no logistical problems and attendees enjoy themselves. Although these are important considerations, the greater payback comes when an organization builds on ideas and momentum generated at the retreat.

The following seven steps offer a checklist for systematic follow-up to maximize the value of a retreat.

1. **Review any notes** from the retreat as soon afterward as possible. Some points might not have gotten onto the flipcharts, while other points may need to be clarified or expanded upon.
2. **Thank all participants.** The CEO, board chair, or convener of the retreat should send a note or thank each participant in person.
3. **Address any open issues**, such as an unanswered question or missing piece of data, promptly.
4. **Report on the retreat** at the next board (or medical executive, or management) meeting. This will keep key people informed and may prompt additional comments or questions.
5. **Use the findings.** Make sure that output from the retreat — comments on the organization's vision or scores from ranking of objectives, for instance — becomes input to the appropriate governance, medical staff, or management process.
6. **Solicit feedback.** Evaluation forms filled out at the conclusion of a retreat, when participants have their minds on the golf course or return trip, might not provide the kind of thoughtful response that will improve subsequent retreats.
7. **Make notes** about what went right and what went wrong. Turn this year's hindsight into next year's foresight, and begin building the foundation for an even better retreat next year!

Resources for Retreat Planning

Lifton, J. 2002. "Holding a Successful Retreat." *Strategic Health Care Marketing* August.

Kane, C.M. 2006. "The Top 10 Myths about Leadership Retreats." *HealthLeaders News* Jan. 24. Available online at www.healthleadersmedia.com.

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Ties That Bind: Connect Emotionally with Boomers and Reap Marketplace Rewards

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mentions that she collects beanie babies, consider enclosing something related to that when you send her her annual birthday card with a reminder to schedule routine exams and tests.

4. Sell to the Age They Think They Are

The phrase "young at heart" has real meaning as people grow older. Boomers may be 60, but they will tell you they feel and act like 45. That means adjusting campaigns and messages accordingly.

You also need to be aware that as people age, they become more right-brain dominant. Instead of seeing things as black or white, they now see in shades of gray. Facts and logic do not always work. Hunches and feelings, possibilities and probabilities, life experiences and emotions — all of these serve as filters that your messages pass through. Play to these things, provide alternatives for the audience, then stand back and let them make up their minds.

Provide people with anchors, things they are familiar with and can relate to in your messaging. If you are explaining a virtual colonoscopy, you might describe it as a CT scan or an MRI that can look inside organs. Those are technologies they know. Or you can describe a virtual colonoscopy in terms of a video game — their grandkids play those!

5. Add and Then Market Appropriate Services

As already noted, boomers do not want to be thought of as old. In fact, look for the term *senior citizen* to disappear from the vocabulary. Is it any surprise that cosmetic surgery and dermatology are some of the fastest-growing medical specialties or that reality TV shows that make people over are so popular?

Respond to what the marketplace will demand. Is cosmetic surgery one of your service lines? Do you offer holistic treatment choices? Do you provide informational resources to keep the boomers informed of the latest treatment and techniques in their areas of interest? Research and listen to what the boomers want.

Boomers are driving and will continue to drive the push to consumer-directed healthcare. That means you have to earn each and every boomer customer. That takes a long time. That is why you need to reach them early, get to know them, and tie yourself to them emotionally. When they are ready to choose health services, you will be well positioned to "find the gold in gray." 🌀

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