

# Annual Offsite & Quarterly Follow-Up Playbook

Goal: Align your team around how they work, uncover hidden patterns that hold you back, and co-create bold experiments that drive performance, collaboration, and a culture of continuous improvement.

## 1-Day Offsite: Align & Accelerate

### Pework Assignments:

- Please bring one object from home that represents something important about who you are - it could be tied to your values, your background, or just something you love. Be prepared to share during our time together.
- Reflect on this question that we will discuss during our time together: If this team worked at its absolute best consistently, what would that look like in practice? Think about what it looks like when we are thriving, how we handle it when things go wrong, how we invite and respect different perspectives into our problem-solving, how we make decisions, the way we stay aligned, and how we make and keep our agreements with each other. What do we do really well today? What gets in our way today? What opportunities do you see for us to improve in terms of consistently working at our best?

### 9:00 – 9:45 | Opening & Connection

**Purpose:** Build psychological safety, create shared context, and signal that this day is for honest reflection and alignment.

**Script to introduce the day:** Today is about stepping back from the whirlwind and looking at how we work together as a team. It's a pause. I'm excited for us to connect, celebrate what's working, surface what's holding us back, and design experiments to take our collaboration to the next level. This is a safe space to think boldly, speak honestly, and imagine how we can truly thrive both as individuals and as a team.

### Activity: Artifact Sharing

- **Script to introduce:** We're going to start today by connecting on a human level. Each of you brought an object from home that represents something about who you are. It might tie to your values, your background, or just something you love. When it's your turn, share what your object is and why you chose it. This helps us see each other as whole people, not just the roles we play at work.
- **Facilitation note:** Keep the time tight, about 1–2 minutes per person, so everyone gets a chance to be heard.

**Outcome:** People see layers of each other's identity, creating empathy and safety for later tough conversations.

### 9:45 – 11:30 | Taking Our Work to the Next Level

**Purpose:** Identify the behaviors, processes, and cultural patterns that slow the team down.

### Activity: Rose-Bud-Thorn Mapping

#### Setup:

- Stack of pink (Rose), green (Bud), and yellow (Thorn) sticky notes and black marker for every 4 participants.
- Make sure all participants have paper and a pen to write with.
- Post a big "Rose-Bud-Thorn" legend on the whiteboard so everyone remembers which color is which.
- Write the powerful question on the whiteboard: If this team worked at its absolute best consistently, what would that look like in practice?

**Script to introduce:** Now that we've taken a moment to connect as people and see each other beyond our roles, it's time to turn that curiosity and honesty toward how we work together as a team. The goal here is to *surface patterns*. To recognize the things that are working well, uncover the habits and patterns that help us thrive, and spot the small roadblocks or opportunities that keep us from consistently being our best. By naming these patterns together, we create a shared understanding of the team we *are* today and the team we *want to become*. The framework we'll use is called Rose-Bud-Thorn:

- *Roses* are what's working well, strengths to celebrate.
- *Buds* are opportunities, things with potential we can nurture.
- *Thorns* are challenges or pain points that get in the way.

What are the Roses, Buds, and Thorns for this question: If this team worked at its absolute best consistently, what would that look like in practice? Let's take a deep breath, zoom out, and close your eyes if you are comfortable. Think about what it looks like when we are thriving, how we handle it when things go wrong, how we invite and respect different perspectives into our problem-solving, how we make decisions, the way we stay aligned, and how we make and keep our agreements with each other. What roses, buds, and thorns do you notice?

Part of the pre-work was reflecting on this ahead of time. You have another 5 minutes to do some free writing about this. If you jotted anything down in preparation for this conversation, feel free to get that out now and spend some time reviewing it and adding anything that is popping up for you now.

### **Step 1: Partner Sharing (20 minutes)**

- Ask participants to find a partner and share their roses, buds, and thorns with each other.
- Ask them to create a combined list of the roses, buds, and thorns that they believe have the biggest impact or are most important to what it looks like in practice for the team to work at its absolute best consistently.

### **Step 2: Small group sharing (20 minutes)**

- Ask partners to find another set of partners to pair with to make a group of 4.
- Ask each set of partners to share out their biggest impact/most important roses, buds, and thorns and as a group, determine the top 10 total roses, buds, and thorns they believe have the biggest impact or are most important to what it looks like in practice for the team to work at its absolute best consistently (10 total, not 10 each).
- Once the group has decided on their top 10, write one idea per sticky note with the black marker (headlines so they can write large enough for the room to see) - Roses on pink, Buds on green, Thorns on yellow. Each group should have a total of 10 sticky notes.

### **Break: 15 minutes**

### Step 3: Whole group share-out (20 minutes)

- Ask each group to share out their top 10 roses, buds, and thorns with a short explanation and post their sticky notes on the whiteboard when they are done.
- As sticky notes accumulate on the board, do some light affinity grouping (clustering common ideas together). For example, if more than one group talks about the Monday morning meeting, cluster those sticky notes together and write “Monday morning meeting” above it.\*

### Step 4: Pattern recognition (30 minutes)

#### Script to introduce:

- Let’s step back and observe. What patterns are emerging?
- Give a few minutes of silent thinking time and then ask them to discuss at their tables.
- Share out whole group.

#### Prompts for table and whole group discussion:

- Where are we clearly at our best? What clusters of Roses show the habits and strengths we cannot afford to lose as we grow?
- Which Buds are game-changers? If we had the capacity to pursue only one or two opportunities, which ones would move the needle most significantly for our team’s impact?
- Which Thorns are costing us the most right now? What patterns of friction drain energy, stall progress, or create frustration we can’t keep tolerating?
- Where do our experiences diverge? What do the mixed clusters reveal about blind spots, uneven experiences, or places we’re not being consistent as a team?
- What rises to the top? If we carried only three insights forward into action, which ones would change the way we work together in the biggest way?
- If six months from now someone outside our team described how we work together, what would we want them to notice first - and what from today’s Roses, Buds, and Thorns will get us there?

Ask the group to capture big ideas from this whole group discussion and write them on the whiteboard.\*

**Outcome:** A visible “Pattern Map” of team strengths, opportunities, and roadblocks plus collective clarity on how they work today and where they want to shift next. The process itself builds trust by naming real issues together.

## 1:30 - 12:30 | LUNCH

- Encourage the group to sit with someone they don't usually work with to build cross-functional connection.

## 12:30 – 2:45 | From Insights to Experiments

**Purpose:** Translate patterns from the Rose-Bud-Thorn into small, concrete experiments the team can try.

### Activity: Design Behavior Experiments

#### Setup:

- Stack of blue (or anything other than pink, green, and yellow) sticky notes and black marker for every group.
- Stickers or dry erase markers if using dot voting in Step 2.

**Script to introduce:** This morning we surfaced strengths, opportunities, and challenges in how we work together. Now it's time to turn those insights into action. But here's the thing: shifting the way a team works isn't simple. It lives in the realm of complexity - where the same action can produce different results depending on timing, context, or relationships. That means we can't design the perfect plan and expect it to hold. So instead of trying to design a perfect solution, we're going to design *experiments*.

Here's the mindset I want us to be in this afternoon:

- These are our best ideas right now for how we want to shift our behaviors.
- Our hypothesis is that these ideas will move us closer to the thriving team we want to be.
- They won't be perfect and they won't all result in the exact outcome we want.
- Our job is to run the experiment and then learn and adapt from the outcomes. We'll try something, then come back to ask: Is it working? What parts aren't? What are we learning? And what do we want to try next?

### Step 1: Generate Possible Experiments (45 minutes)

- Ask groups to review the key ideas captured from the morning conversation and design experiments that could help the team consistently work at its very best.

- Prompt: Based on the big ideas from our work this morning, what small shifts or new behavior could we try as an experiment that might help us move towards thriving/working at our best consistently? Don't forget those "Roses" that we identified as ones we can't afford to lose!
- Ask each group to write their experiment ideas on sticky notes and share out with a short explanation and post their sticky notes on the whiteboard when they are done.
- As sticky notes accumulate on the board, do some light affinity grouping (clustering common ideas together).

## Step 2: Prioritize (15 minutes)

- Use either dot voting or an Impact vs. Difficulty matrix to determine top 3 experiments to run over the next 90 days.
- Facilitator script: We can't do everything at once, so let's prioritize. Which of these experiments feels both important and doable for us to try first?
  - Dot voting\*: Give every participant 3 stickers or a whiteboard marker. Explain every one has 3 votes to identify the experiments that feel both important and doable to try in the next 90 days. Participants can "spend" their votes however they want. Agree to move forward with the top 3 experiments.
  - Impact vs. Difficulty matrix\*:
    - Draw a horizontal and vertical axis on the board.
    - Label the horizontal axis as Difficulty.
    - Label the vertical axis as Impact.
    - Ask the team to move the experiment sticky notes into the matrix based on how difficult (time, budget, manpower, etc) the experiment will be and how big the impact the experiment has the potential to be for the team.
    - Start with the experiments that are low difficulty and high impact first!

## Break: 15 minutes

### Step 3: Build the Experiment Plan (30 minutes)

- Create new work groups, one for each of the top 3 experiment ideas. Each group designs one of the experiments. Determine and capture:
  - What exactly will we try in this experiment? The who, the what, the how, and the when.
  - What's the outcome we believe this experiment will unlock (i.e. our hypothesis)?
  - Who owns it?
  - How will we know if it's working?
  - How will we know if it's not working?
  - When will we check in to evaluate?
- If you have a larger group and/or experiments people are excited to get to, you can select the next 1, 2, or 3 experiments you will try AFTER these first 3 and have groups working on those as well.

### Step 4: Share and Finalize the Experiment Plan (30 minutes)

- Ask each group to share their experiment plan with the whole group.
- Ask the whole group for their feedback on the experiment plan. Prompts:
  - What might get in the way of us actually doing this and how could we design around that?
  - Whose perspective or input is missing here that could make this stronger?
  - If we ran this tomorrow, what's the first moment it might break down and what would we need in place to prevent that?
- Ask if everyone is willing to participate in this experiment plan as written. Make adjustments as needed.

**Outcome:** A 90-day experiment plan that names the key behavior shifts the team wants to try, with clear owners, timelines for evaluation, and a shared commitment to implementing, learning, and adjusting along the way.

## 2:45 - 3:15 | Closing Reflections

**Purpose:** Close the day with clarity, ownership, and energy connecting today's insights to personal commitments and creating a collective launch into the 90-day experiments.

### Activity: Reflection and Launch

**Script to introduce:** Today, we didn't just talk about our work, we looked at the way we do our work together. That's our culture. And culture isn't something out there, it's built moment by moment in the patterns we choose, the conversations we have, and the behaviors of all of us every single day.

We've named what helps us thrive, we've designed experiments to shift what gets in our way, and now the real work begins. Because culture doesn't change in a day - it changes in what we do after we walk out the door.

Before we close, I want us to take two final steps to lock in today's momentum:

1. **Personal Reflection:** Take 3 quiet minutes to write down your response to this question:

*What shift will I personally need to make in order to fully participate in the experiments we committed to today?*

Be honest with yourself - this is about ownership, and is only for you.

2. **The Launch:** Let's whip around the room. Each person will share one thing you are excited about as a result of today. It can be big or small - just one thing that has you looking forward. I'll give you one minute to think about it.

This is our launch moment. The experiments are written on paper, but their success lives in us - in the way we show up, challenge ourselves, and support one another. This is how we shift from intention to action. This is how we thrive!

\*Take photos or otherwise capture this work product for Quarterly Follow-Ups.



## Quartely Follow-Ups: Reflect, Learn, Adjust

### Pework Assignments:

- Review the 90-day experiment plan from the offsite. Reflect on your personal role and contributions to each experiment.
- Bring examples or observations from the last 90 days: what worked, what didn't, and any surprises.
- Consider experiments you wanted to try but weren't prioritized at the offsite.

### 8:30 – 9:00 | Opening & Framing

**Purpose:** Reconnect the team, align on the purpose of this session, and create psychological safety for honest reflection.

**Script to introduce:** Over the last 90 days, we've tried new ways of working together. Some things went well, some didn't, and some surprised us. Today is our chance to pause, reflect, and learn as a team. We're not here to judge or blame - we're here to see patterns, understand what's really happening, learn from what we've tried, and decide what to try next. This is about learning, alignment, and action.

### Activity: Speed Dating

**Facilitator Script:** To start our day, let's do a quick connection activity. When I say 'go,' find a partner in the room that isn't at your table right now. You will have 3 minutes total to share your answer to this question: <select one question from the list below or sub your own>. Once you've shared with your partner, I'll say 'switch.' Find a new partner and answer the same question again. We'll do this three times total so you'll meet three different people. Each round is just 3 minutes - 1.5 minutes per person. This is fast, fun, and a chance to hear different perspectives around the room. Ready? Let's go!

### Sample Questions:

1. What's something you've learned about yourself over the last 90 days?
2. What's a mistake you made recently, and what did you learn from it?
3. What's one thing you're proud of from the last quarter?
4. What's one thing you want to learn in the next 90 days?

**Facilitator Tips:**

- Keep time strict: 3 minutes per round, then call “switch.”
- After the three rotations, ask for a few volunteers to briefly share anything interesting they heard.

**Outcome:** Team is primed to engage openly, connect, and focus on learning from the experiments.

**9:00 – 10:00 | Experiment Reflection & Insights**

**Purpose:** Surface what’s working, what isn’t, and patterns across experiments.

**Activity: Quick Experiment Reporting & Reflection**

**Set up:** Recreate the Rose, Bud, Thorn map, big ideas, and experiment list (Dot voting or Impact vs. Difficulty matrix) captured from the Annual Offsite (or last Quarterly Follow-up) on the board/share photo to the whole group.

- **Step 1: Individual Reflection (5 minutes)**
  - Prompt: For each experiment you participated in, what did we learn? What worked better than expected? Where did we get stuck or encounter surprises?
- **Step 2: Small Group Share & Synthesis (25 minutes)**
  - Move into groups of 4 and share your learnings. Identify emergent patterns: What is moving the needle? Where are recurring challenges? What unexpected benefits or consequences appeared?
  - Identify your top 3 insights, aha’s, or learnings as a group and be ready to share them.
- **Step 3: Whole Group Share & Consolidation (30 minutes)**
  - Each group reports key learnings and patterns to the whole team.
  - Captures key insights on the whiteboard (e.g., “what’s working,” “unexpected results,” “what we’re learning”).
    - Focus on collective insight, not individual mistakes.
    - Discussion Prompts:
      - What patterns of success do we want to preserve or double down on?
      - Where did our experiments hit unexpected roadblocks, and what can we learn from that?
      - Are there opportunities we didn’t prioritize at the offsite that might make sense now?
      - What’s the most important learning to carry into the next quarter?

**Outcome:** Shared understanding of experiment results, emergent patterns, and lessons learned across the team.

**Break: 15 minutes**

## **10:15 – 12:00 | Adjust & Design Next Experiments**

**Purpose:** Translate learnings from the past 90 days into concrete experiments for the next quarter.

**Activity: Adaptive Experiment Planning**

### **Step 1: Generate New Experiment Ideas (20 minutes)**

- Ask each group to review the patterns and insights surfaced in the Experiment Reflection & Insights section and brainstorm new experiments inspired by what worked, what didn't, and what opportunities emerged.
- Ask each group to write their experiment ideas on sticky notes and share out with a short explanation and post their sticky notes on the whiteboard when they are done.
- As sticky notes accumulate on the board, do some light affinity grouping (clustering common ideas together).

### **Step 2: Prioritize Experiments (25 minutes)**

- Add any additional experiment ideas to the list captured from the Annual Offsite that haven't been completed yet.
- Facilitator script: "We can't do everything at once. Let's surface which experiments feel both important and doable, so we can focus our energy where it matters most."
- Use dot voting or an Impact vs. Difficulty matrix, just like in the Annual Offsite, to identify the top 2–3 experiments for the next quarter.\*
- Encourage participants to consider previously deprioritized experiments if they now seem valuable or previously prioritized experiments if they now seem less valuable.

### Step 3: Design Experiment Plans (30 minutes)

- Create new work groups, one for each of the top 3 experiment ideas. Each group designs one of the experiments. Determine and capture:
  - What exactly will we try in this experiment? The who, the what, the how, and the when.
  - What's the outcome we believe this experiment will unlock (i.e. our hypothesis)?
  - Who owns it?
  - How will we know if it's working?
  - How will we know if it's not working?
  - When will we check in to evaluate?
- If you have a larger group and/or experiments people are excited to get to, you can select the next 1, 2, or 3 experiments you will try AFTER these first 3 and have groups working on those as well.

### Step 4: Share & Finalize (30 minutes)

- Ask each group to share their experiment plan with the whole group.
- Ask the whole group for their feedback on the experiment plan. Prompts:
  - What might get in the way of us actually doing this and how could we design around that?
  - Whose perspective or input is missing here that could make this stronger?
  - If we ran this tomorrow, what's the first moment it might break down and what would we need in place to prevent that?
- Ask if everyone is willing to participate in this experiment plan as written. Make adjustments as needed.

**Outcome:** Updated 90-day experiment plan that reflects lessons learned, incorporates new ideas, names key behavior shifts, assigns owners, sets evaluation timelines, and has full team alignment and commitment.

## 12:00 – 12:15 | Closing Reflection & Launch

**Purpose:** Anchor ownership, personal commitment, and team excitement for the next quarter.

### Activity: Reflection and Launch

**Script to close:** Today we've reflected on what worked, learned from what didn't, and designed experiments to push ourselves further. The real work starts when we leave this room. These experiments are how we practice our culture, and each of us has a role to play. Let's carry this energy, this clarity, and this commitment into the next 90 days so we continue building the team we want to be - thriving, aligned, and bold.

Before we close, I want us to take two final steps to lock in today's momentum:

1. **Personal Reflection:** Take 3 quiet minutes to write down your response to this question:

*What shift will I personally need to make in order to fully participate in the experiments we committed to today?*

Be honest with yourself - this is about ownership, and is only for you.

2. **The Launch:** Let's whip around the room. Each person will share one thing you are excited about as a result of today. It can be big or small - just one thing that has you looking forward. I'll give you one minute to think about it.

**Outcome:** Personal and team ownership of next-quarter experiments, aligned commitment, and energy to take action.

\*Take photos or otherwise capture this work product for Quarterly Follow-Ups.