The 4 Questions to Ask: Planning a Knockout RETREAT

A leadership retreat is a huge investment... but are you seeing a noticeable difference with your team post-retreat and a lasting positive impact on your business? Here are the top reasons why retreats fail to move the needle:

1. Budget Allocation:

Are you making the right investments?

How much are you spending on air travel, hotels, food, and wine tours... vs your facilitator? Which investment will have the greatest business impact?

(Check the facilitator's credentials: What leadership roles have they held? How deep – and wide – is their IP? And what external recognition have they earned?)

2. Agenda Structure:

Is the "run of show" strategic?

Are you trying to do too much? Not enough? Has each segment of the retreat "earned" the right to be there? Is it the right mix of strategic, tactical, and relational? And does the agenda build your collective knowledge base and ability to drive the business?

3. Accountability:

Does every team member make commitments?

Does the day just end, notebooks close, and everyone run off to food and drink? (Or to check their phones...)

Or have you built in an accountability process, with written and verbal commitments, and post-retreat follow-up?

4. "Team-Building" Activities:

Do they actually improve collaboration?

Do traditional "campy" team building activities like ropes courses and trust falls actually contribute to better performing teams...?

Design team-building activities that actually foster connection and stronger relationships, that carry over to when you land back at the office. (We have lots of ideas for you.)

For more insights

Leadership Retreats: Strategic Overview
[Recorded live webinar and Q&A]

Choosing a Retreat Facilitator:
10 Tough Questions to Ask [2 Pager]

The Retreat Expectations Gap: What teams ask for vs what they need [1 Page tipsheet]

When it comes to ROI, we know how to create a retreat experience that creates lasting impact on your business trajectory. Reach out to see how we can help.



Randall Craig

Hall of Fame speaker, former senior exec, serial entrepreneur, best selling author, & Braintrust Professional Institute CEO

braintrust
Professional Institute

LET'S DELIVER A GREAT RETREAT!

www.BraintrustProfessionalInstitute.com | info@randallcraig.com | 416-918-5384 | Book a meeting; www.randallcraig.net/30



Braintrust Professional Institute

Leadership Retreats

Randall Craig: 3X founder. Public company senior exec. Author of 8 books. Retreat Facilitator, Coach, and Hall of Fame Business Speaker.

The purpose of a retreat is not to have a retreat: it's an opportunity to drive change, and work "on" the business, not just in it. It's an opportunity to generate alignment, upskill, strengthen relationships, and empower the group to achieve.

As retreat facilitators, we work exclusively with leadership teams and boards, sharing been-there-before advice, creative thinking, and perspective. We work through your most challenging issues, and build understanding and consensus. The vast majority of our work is with service or knowledge-based organizations, and ranges from helping innovators grow, to helping global leadership groups solve their most complex problems.

We've held many senior roles ourselves, and have worked with 100+ credible organizations, so we understand many of the issues and pressures that leaders face. My experience as an executive coach, venture partner at a VC, and public company board member means more real-world expertise can be brought to the table.

If you have any questions, or think there is a fit, please reach out at request@RandallCraig.com; my direct mobile number is 416-918-5384. We're easy to work with, and exceptionally responsive. Let's make your next off-site or retreat a success.

Randall

CREDENTIALS

braintrust
Professional Institute

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www.BraintrustProfessionalInstitute.com

The Braintrust Retreat Process



We work with your senior leadership on an agenda that meets your objectives, driven by insights from interviews from your team.

BUILDING A SUCCESSFUL RETREAT: THE BRAINTRUST PROCESS

Kick-off meeting: Draft your goals for the retreat

Generally, the goal of the retreat is to synchronize and set direction, but what are you specifically hoping to accomplish? What is the one thing that can be achieved by bringing the group together that can't be done during the regular day-to-day? What issues need deeper exploration, or would benefit from stronger alignment? And are there any no-go zones that should be avoided?

Confidential Interviews with retreat attendees

We meet one-on-one with each of your team members who will be attending. We want to understand their priorities and challenges, hear what's stopping them, and learn what would help them become more effective leaders. We do this so we can identify common themes and low-hanging fruit to include in our retreat design. (It also builds trust, which is critical during the retreat itself.)

Retreat Design

Based on your goals and the interviews, we'll put together an agenda that can include a mix of training modules, breakout group work, practical problem solving, and facilitated conversations. (It will also include relationship-building and social time.) There will be a "flow" – a story arc for the day where each block in the schedule builds on the previous one. We will also put together possible pre-reading (or pre-work), so everyone can hit the ground running.

Approval and Fine-tuning

We'll walk you through the draft agenda, and work with you to fine-tune it. Some clients are surprised by elements of the agenda – but they are there because it can address issues brought forward by members of your team. Once the agenda is set, we'll begin developing the detailed facilitation notes, customizing any training, and putting together any pre-reading/pre-work.

On-site Mentorship

Attendees will typically have many questions and reflections during the event. Some of the most impactful conversations happen outside the formal schedule: at breaks, the evening before, and the evening after. We actively seek out these conversations to help your team more deeply process their learning.

Post-event Reinforcement

For any new learning to stick, there needs to be follow up. We will provide visual reference sheets, and provide post-retreat readings. After the event, we will also meet with your senior leadership to share additional insights that surfaced during the pre-interviews, formal sessions, and our on-site conversations.

WHY US?

Focus:
The vast majority of our engagements are with service or knowledge-based organizations.

Professional:
We are easy to work with, go above-and-beyond, and are discrete.

Client empowerment:
The goal is client self-sufficiency - not consulting-style "scope creep".

Individualized approach:
Your organization has a unique history, people, strategy, structure, strengths and challenges. We don't use a one-size-fits-all "program": your retreat will be as unique as you are.

Randall has likely been in your shoes:
Nine years consulting at KPMG. Senior exec at an American public company, Serial entrepreneur, Executive coach, Corporate and not-for-profit board member, VC Venture Partner.

Credentialled:
Several university degrees, FCMC, CFA, iGP, CSP, HoF, plus other certifications. And 8 books, 400+ media interviews, a podcast, and over 650 articles published.

More than just work:
Randall has served several not-for-profits as President, earned a black belt in Karate, enjoys long-distance cycling, and has written a broadway-style musical. He is married with three adult children.

Randall is a perceptive, highly innovative thinker with an acute awareness of the fundamental principles of business and a sincere curiosity in the promise of technology and how it can improve the human condition.

Patrick Ferrier
President, McGraw-Hill Ryerson Higher Ed

Their methodologies have depth and are effective. We get exceptional value for every dollar spent.

Brad Christmas
CIO, Akin Gump

A top number one communicator and visionary with excellent skills and technical knowledge. I can recommend Randall without reservation.

Bob Coffey
Vice Chair, KPMG

Randall is simply one of the brightest people I know. He is gifted in seeing things from both the 50,000 foot level and sea level at the same time, and snatching -- seemingly from thin air -- the one piece of the puzzle that will make the entire strategy work.

Michel Neray
CEO, MoMondays

Randall's expertise and experience in all areas of strategic communication, marketing, web and social media is remarkable in its breadth and depth.

Sylvia Link, APR
Chief Administrative Officer, RTOERO

request@randallcraig.com 416-918-5384

Client List (Selected)



Deep experience, powerful impact, and easy to work with.

Selected Retreats, Workshops, Keynotes

Financial Services

Association for Corporate Growth
Canadian Association of Insolvency/Receivership Professionals
Canadian Insurance Accountants Association
CG Coralisle Insurance
ENCON
FCC Farm Credit Corporation
Financial Executives International
Manitoba Crown Corporations Council
Manulife Financial
Million Dollar Round Table study group
Social Investment Organization
Surety Association of Canada
TD Asset Management
Toronto CFA Society (5X)
Toronto Police Widows & Orphans Fund
Treasury Management Association of Canada

Professional Services

CCWESTT Annual Conference
CMC Thought Leadership Forum
CPA Canada (5X)
Felix Global (4X)
Grant Thornton (6X)
Legal Marketing Association (2X)
Minden Gross
National Association of Trial Lawyer Executives
Ontario Centre for Engineering and Public Policy
Project Management Institute (2X)
Sapiens
SB Partners conference
Social Media Week
The Law Office Management Association

Entrepreneurs

Family Firm Institute
Galtronics
Happy Worker
Klever Programmatic
Responsive Group
Rogers Small Business Forum
Speakers Forum
Women's Enterprise Centre of Manitoba

Education/Public Sector

Asper School of Business Exec education (2X)
Assoc of Municipalities of Ontario
Canadian Association of Communicators in Education
City of London
Global Youth Leaders
Municipal Information Systems Association
Ontario Association of School Business Officials
Ontario Business Educators Association
Queens University
Ryerson University (2X)
Schulich Executive Education Centre
Schulich School of Business
Society of Local Government Managers of Alberta
Toronto Attractions Council
University of Guelph
University of Toronto
York University

Health/Medical

American Massage Therapy Association
Evara Health
Ontario Association of Naturopathic Doctors (2X)
Toronto Dental Academy

Associations / Regulators

Admin Professionals Conference
American Association for Quality
American Coal Council
American Society of Association Executives
APEX (2X)
Association of Accrediting Agencies of Canada
Association of Registered Graphic Designers
Automobile Journalists Association of Canada
Boating Ontario
Canadian Association of Professional Speakers (6X)
Canadian Association of Fairs and Exhibitions
Canadian Association of Family Enterprises (2X)
Canadian Car Wash Association
Canadian Network of Agencies for Regulation
Canadian Produce Marketing Association
Canadian Safe Boating Symposium
Canadian Urban Transportation Association
Construction Safety Association of Ontario
CSAE National Conference (9X)
CSAE Summer Summit, Winter Summit, HR Summit
HRAI National Conference
HRPA National Conference (3X), plus many chapters
International Association of Business Communicators (3X)
International Customer Service Association
National Coalition of Black Meeting Planners
Ontario Association of Cemetery and Funeral Professionals
Ontario Retirement Community Association
Recruitment & Retention conference (2X)
Registered Veterinary Technologists and Technicians of Canada
Structural Pest Management Association of Ontario
Supply Chain Logistics National Conference
Tire and Rubber Association of Canada
Western Sponsorship Congress

Selected Coaching or Advisory Engagements

Financial Services

Advance Insurance
BC Securities Commission
BDC: Business Development Bank of Canada
CIBC
CMDF
DBRS
Encasa Financial
Hillmount Capital
HMW Capital
CIRO (formerly IIROC)
Manitoba Public Insurance
MDS Capital
Mellon Bank
OMERS
Pension Investment Association of Canada
SLA of California
Sun Life Financial RE group
TD Bank Quantitative Analysis
Thomas Cook Financial Services

Health/Medical

Acupuncture Canada
Canadian Alliance of Physiotherapy Registrars
Canadian Chiropractic Association
Kinark Child and Family Services
Ontario Association of Naturopathic Doctors

Professional Services

Advocates for Justice
AJAG
Akin Gump
BAI Bragonier & Associates
Basadur Applied Creativity
Bensimon Partners
Cole Engineering
Crowe Soberman, Crowe BGK, Crowe MacKay
Davies, Ward & Beck
English Marketing Works
Dykema Gossett
Grant Thornton
Hardie & Kelly
KPMG
SB Partners
Stikeman Elliott
Strategic Counsel
Strategic Systems Engineering
Thane Crossley Partners
Tuckers PC
Warren Shepell Consulting
A Global Top 5 Law Firm

Technology / Agencies

Bargains Group
Box Clever
CanRad
Conros
EXT. Marketing
H Street Digital
Insception Lifebank
Instanet
Lemonade Media
Mount Pleasant Group
Pearl Strategy & Innovation Design
Piquant Marketing
RSRS
The Search Guru

Education/Public Sector

Auditor General of Canada
Dufferin-Peel Catholic District School Board
Durham District School Board
Environment Canada
Metrolinx
Ontario Ministry of Education
Peel District School Board
Peel Industry-Education Council
Toronto District School Board
University of Toronto
University of Western Ontario
Veterans Affairs
York University

Associations/Regulators

Canadian Association of Professional Speakers
Canadian Society of Association Executives
Canadian Society of Nutrition Management
Childhood Cancer Foundation
College of Veterinarians of Ontario
Cooperative Housing Federation of Canada
Lean In Canada
NALP
OACETT
Retired Teachers of Ontario
Retirement Homes Regulatory Authority
Room 217 Foundation
Toronto Real Estate Board

Media & Publishing

Canadian Publishers' Council
Globe and Mail
Harlequin Enterprises
McGraw Hill
Torstar/Toronto Star



CHOOSING THE RIGHT RETREAT FACILITATOR

HOW DO YOU KNOW IF THE RETREAT FACILITATOR IS RIGHT FOR YOU? The best way is to ask some tough questions:

① HOW MUCH DO YOU REALLY KNOW ABOUT STRATEGY? LEADERSHIP?

A tough question, but if the answer is "read all of my books, review my (published) research, listen to my podcasts, and here are example advisory clients", then the person may have the expertise. But is it proven? Have they built their own strategies at the organizations they've led? And helped their clients do so too? And what is the scale of the organizations that they have led (or advised)? And what is the size of the organizations whose retreats they have led? ***Feel free to read all eight of my books, and listen to my podcast; happy to share my list of advisory clients as well. I have decades executing strategy as a leader, decades advising senior leadership on strategy, and decades as a master facilitator. I've advised (and led retreats for) global multinationals, start-ups, and associations. And I've built three companies myself.***

② WHAT DID YOU DO BEFORE? HOW LONG AGO WAS THAT?

It's very hard to get up in front of a group of leaders if you haven't been in their shoes. And it's hard unless you have worked with many leadership teams, across different sectors, helping solve their toughest challenges. Just because you can speak or facilitate, doesn't mean you have the depth to run an effective retreat. ***My early career was with KPMG, and left them in the 1990s to become a (3X) serial entrepreneur. I have also spent three years as a senior exec at an American public company, and have long sat on corporate and not-for-profit boards. I've helped 100+ well-known organizations address their key issues.***

③ WHAT ELSE DO YOU DO, BESIDES LEAD RETREATS?

Is the facilitator committed to leading retreats, or is it just a sideline? And if they do other things, do these enhance the value of the retreat experience, or do they distract from it? ***We exclusively focus on helping organizations build alignment, solve tough problems, and grow. Core to our successful retreats is the value we bring from our three other activities: executive coaching, training leaders, and writing/speaking. I also sit on a public company board and am a venture partner in a VC, which brings another important dimension to many of our retreats.***

④ ARE YOU REALLY A THOUGHT LEADER?

The retreat leader should not just be a facilitator, but also a thought leader who can inject new insights into the retreat conversation. The problem is how to prove that they actually "are" one. A strong indicator is a long history of creating new intellectual property. If they don't demonstrate their thinking outside of the retreat, then it's unlikely they will bring new insights or add unique value at the retreat. Pay attention to their podcast and blog, but also LinkedIn, Facebook, YouTube, X/Twitter, etc. Google them, see how often they come up, and where they appear. ***Beyond my weekly blog and weekly podcast, I have 700+ thoughtful articles, 70+ white papers, and hundreds of hours online of me being interviewed (and me being an interviewer). Check out my LinkedIn profile, the Braintrust and the Randall Craig websites, and Google. (I never call myself a thought leader, but others have: Thinkers360 has ranked me a "Top 50 Global Thought Leader" on Business Strategy, and also a "Top 50 Global Thought Leader" on Marketing.)***

⑤ WHO ARE YOUR "BEST FIT" RETREAT CLIENTS?

Facilitation is important, but domain knowledge is equally important: you certainly don't want the retreat leader learning your industry or sector "on the job". ***We have deep experience with service or knowledge-based organizations: professional services, financial services, agencies, tech, and associations. Our leadership retreat clients have ranged from scrappy start-ups, to global financial institutions. We only accept engagements where we know we can make a difference, and where we enjoy working with each other.***

⑥ WHAT IS YOUR APPROACH TO FACILITATION?

"The answer is in the room" is the hallmark of an excellent facilitator, but it is rarely the hallmark of an excellent retreat. Retreats are rarely just pure facilitation, and the best ones also include components of small group work, training, coaching, group dynamics, social time, and a linkage to other resources. ***While each of our engagements is unique, they all share a common foundation: to explore the knowledge in the room, extend it by introducing new shared vocabulary, and build alignment toward common goals. We use a variety of techniques - including the ones cited above - to make sure that we get the most from each and every participant, and that the retreat goal is achieved.***

⑦ WHAT ARE YOUR REQUIREMENTS OF US, BEFORE THE RETREAT?

Too often, retreat facilitators bring a canned presentation or process, and ask perfunctory questions for "customization". The benefit of this is that there is little time impact for you beforehand; you show up, participate in "the process", and then go back to the usual day-to-day. The downside: no deep customization, little alignment, and incomplete buy-in. There must be participant engagement with the facilitator beforehand: this is the "raw material" that the facilitator uses to fully customize the agenda, develop the materials, and interact effectively. ***We meet with the leader to understand the objectives, then interview each attendee to understand their challenges, and the dynamics at play. We listen for themes, then design the agenda and work with you to fine-tune it. Finally, we'll develop any training modules and facilitation notes, and review then with you. And if needed, we'll also do some micro-coaching to maximize your effectiveness at the retreat. The goal of the retreat isn't a retreat - it's to achieve a specific outcome: this can only happen when everyone is engaged, right from the start.***

⑧ WHAT DO OTHERS SAY?

Read through the facilitator's testimonials, and ask for their credentials. Is their client list filled with credible names? Then satisfy yourself with their references, either through online testimonials, or by asking for the reference's contact info. ***Check out my LinkedIn recommendations for feedback from my clients, or ask me for references.***

⑨ HOW HAVE YOU BEEN RECOGNIZED FOR YOUR IMPACT?

Experts are recognized by their peers – not themselves - for the impact of their work. Beyond their certifications, ask about their national-level awards. ***I am the only person who has been named a Fellow of the management consulting profession (FCMC), and also been inducted into the Canadian Speaking Hall of Fame. And I am one of only 27 people awarded the Griner award by the CSAE for my impact on the association/not-for-profit sector in Canada.***

⑩ HOW DO YOU MAKE SURE THAT WHAT HAPPENS AT THE RETREAT "STICKS"?

Dig deeper, because the answer to this question starts well before the retreat itself: what conversations and interviews take place beforehand? How is the agenda set up? What pre-reading and/or pre-work is expected of attendees? And then within the retreat itself: What accountability processes are set-up? What commitments are made by each attendee, and by the group as a whole? Finally, what follow-up is built into the post-retreat processes, both by the most senior leader, and potentially by the retreat facilitator. ***We do all of the above, and more. Post retreat, we can collaborate closely with internal resources, and if required, we can supplement existing internal resources with coaching, functional training, ongoing professional development, and resources from our Leadership Intelligence Center.***

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THE BRAINTRUST TEAM





RANDALL CRAIG, CEO

Key roles on Braintrust Retreats
Randall will work with you to define the overall retreat goals and parameters; he'll also be your key executive contact.

He will interview about 1/3 of the attendees, and together with Ronja, will build the draft agenda. Once this is set, he will develop the facilitator notes, develop customized training segments, and build the presentation materials.

During the retreat itself, Randall will be the principal facilitator, engage attendees between segments, and provide real-time feedback and insights to the leadership. He will also engage with key participants to answer questions, reinforce key concepts, and provide on-site mentorship.

After the retreat, Randall will prepare visual reference sheets and post-retreat readings for distribution. He will also facilitate an impact meeting to go over our insights, answer any questions, and review our recommendations on getting the progress to "stick".

Bio
Randall has held a long-time position at KPMG, was an executive at an American public company, and founded (and exited) two of his own companies. He has served over 100 organizations as an advisor or board member, leads the Braintrust Professional Institute, sits on a public company board, and is a venture partner at a VC. Randall has written 8 books and has built a library with over 1100 resources. He delivers executive coaching, facilitates high-stakes meetings, and delivers key training courses.

Randall has been inducted into the Professional Speaking Hall of Fame, earned a Black Belt in Karate, and has written a Broadway-style musical. He holds an FCMC, CFA, MBA, CSP, iGP, and is a certified Basadur Simplexity facilitator.

Quotable Quote
"What if? What's stopping us? How might we?"



RONJA FRANCOEUR, COO

Key roles on Braintrust Retreats
Ronja will put together the interview guide and interview about 2/3 of the attendees. She will comb through the meeting notes, then cluster common themes, identify low-hanging fruit, and note sensitive issues for executive review. She and Randall will then build the draft agenda.

During the retreat itself, she will deliver selected modules, engage attendees between segments, and function as an "over-watch", providing in-session feedback and insights – this allows us to flex the content and adjust the schedule in real-time.

After the retreat, Ronja will prepare the impact report, summarizing any additional insights that surfaced during the pre-interviews, formal sessions, and our on-site conversations.

Bio
Ronja has held prior roles as a facilitator and marketing leader in an advisory firm, and is an expert in marketing and digital marketing management. Ronja is responsible for the operational leadership of the Braintrust Professional Institute, delivers client training and retreat facilitation, and has co-created the library of Braintrust courses and resource kits.

Ronja speaks French, is an active community leader, and a graduate of the Innovation Governance Program. She holds an Honours BA from York University, in addition to a Certificate of Technical and Professional Writing.

Quotable Quote
"Be a role model. Be someone people want to be with."



Randall does his research, homework and structures every session based on a theme, and comes with a list of ideas.

Jillian Bannister
CEO

Randall was incredibly deft at picking through the "noise" to help me drive sustainable growth.

Hal Smith
Founder

Working with him over the years transformed the organizations I led.

Alison Dantas
Executive Director

Randall's astute counsel and strategic perspective have been invaluable to me as the CEO.

Kirk Layton
President

Ronja challenged us to think deeply about what truly mattered.

Christina Braun
President

The ideas he shares and feedback he's provided have driven growth. There's nothing I can't bring to the table.

Leslie Carruthers
CEO

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BRAINTRUST RESOURCES



WEEKLY THOUGHT-PROVOKING INSIGHTS TO PROVIDE TIMELY NEW PERSPECTIVES

Defining a Leadership Retreat's Objectives

"We need to get on the same page."

It's a common refrain when organizing corporate retreats, and on the surface, it seems straightforward enough. But is "getting on the same page" really what your team needs? The difference between a stated objective and what can actually make this happen can mean the difference between a transformative retreat and a missed opportunity.

When planning retreats, there's often a gap between the initial ask and the deeper organizational needs – a gap that can only be bridged through careful investigation and honest dialogue.

So here are five key factors that can bridge the gap:

1) Pre-retreat Intelligence: Beyond industry and trends research, Interview each participant before the retreat. Very often there will be patterns and perspectives that weren't visible in the initial planning conversations. When multiple people highlight the same challenge from different angles, it signals an important area that might need addressing.

2) External Perspective Advantage: Outside facilitators often uncover insights that internal stakeholders miss. Without any political "baggage", they are able to gather candid feedback and identify common threads far more easily.

3) Balancing Competing Needs: Sometimes what's needed and what's asked for aren't the same thing. For example, a request for "leadership training" might actually mask a need for better decision-making processes, or a bonus plan that encourages greater collaboration. The skill lies in addressing both the stated objectives and the underlying needs.

4) Setting Expectations: Once the insights are collected and analyzed, they can be used to set clear expectations with both the senior leadership, and participants. This ensures everyone arrives prepped for the retreat, and which may be a very different experience than previous retreats.

5) The Flexibility Factor: Build flexibility into both the retreat design and its execution. The idea isn't to be a slave to the schedule, and when necessary, adapt in real-time as the retreat unfolds. If a particular discussion strikes a chord or when an unexpected challenge surfaces, these are opportunities.

Being willing to deviate from the planned agenda – whether that means extending a productive discussion, reorganizing breakout sessions, or pivoting to address an emerging issue – can lead to breakthrough moments. The key is maintaining enough structure to achieve core objectives while remaining responsive to the group's actual needs and energy in the room.

Insight to Action: One of the biggest challenges to delivering an impactful retreat is one where the status quo is (merely) fine. Consider the last retreat that you participated in, and give your organization a grade for each of the above five factors. (The best retreats have five Straight A's.) Then file this Tipsheet for when it comes to planning your next one.

What Would My Mentor Do?

Coaches and mentors hold a special place in most successful leaders' careers. They provide advice on difficult decisions, give valuable perspective, and smooth the political way when problems occur.

But what should you do if your coach or mentor is not available, and you need their advice? Stalling or deferring your decision isn't a preferred alternative, and neither is interrupting their vacation with your question.

One obvious approach would be to ask someone else; in other words, looking for a substitute. Or perhaps you might collect more facts, in order to reduce the risk of making the wrong decision. (If you use this approach, however, make sure that you are not conveniently doing so to procrastinate making the decision itself.)

The problem with these approaches is that they both do not take advantage of the experience you've gained through your relationship. Instead, what if you were to ask yourself a simple question: What would my coach or mentor do in this situation? Asking this question shifts your perspective, and allows you to see the situation with a new light: your coach's or mentor's. In fact, the closer your relationship, the better your answer will be.

Ironically, perspective shifting is useful even if you don't have a coach or mentor. Before making any decision, just imagine how a specific senior leader would approach the issue: what would they do?

And while you're at it, why not consider the situation from several perspectives. For example, on a pricing decision: what analysis would Jennifer the CMO do? What questions would Pat the CFO come up with? Your board chair? Your largest client? And so on.

A coach or mentor's gift is their perspective, but we often forget it's there even when they aren't; we just have to ask!

Insight to Action: Beyond the day-to-day, what is your biggest professional challenge? This week, consider how your coach or mentor(s) would approach it: What would they say? And how might they start addressing the issue?

MORE BRAINTRUST RESOURCES

- 700+ articles like those on this page, to provide point details and timely new perspectives.
- 130+ episodes of *So Here's your Challenge* podcast designed to translate insight to action.
- 180 hours of thought leadership video interviews.
- 83 topic-focused video Q&A recordings on leadership, strategy, people, marketing, and business development.
- 71 white papers that focus on specific strategic and tactical issues.
- 9 tactical online courses on business growth topics.
- 8 books that provide long-form deeper knowledge.
- 5 years of continuous email-based learning.
- *Braintrust Professional Institute:* Leadership retreats, Executive coaching, Management training, and just-in-time, continuing professional development.

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