

# EXPERTS WITH IMPACT

## In Employee Engagement and Change



### SITUATION: BESPOKE OFFSITE EVENT FOR A WEALTH AND ASSET MANAGEMENT FIRM

We worked closely with the client to design and develop a bespoke offsite event in Lisbon with the objective to increase the impact in the way they communicate and to maximise the value of every meeting they lead or attend.

### OUR ROLE

Following discovery and briefing meetings with the client, we agreed to distribute an online questionnaire to participants to anonymously answer questions to obtain their thoughts on the status quo of communication in external and internal meetings. This allowed us to obtain real, unbiased quantitative and qualitative data which formed an integral part of our content.

We based the offsite around an overarching framework model: *Preparation for, Conduct during, Follow-up after.*

We divided our content into specific, discrete but related areas based on the priorities the client shared with us – we then allocated these to the most appropriate phase of the framework model. Within each phase, we provided practical tools, tips and techniques for participants to apply in their professional lives. This model helped us to navigate through the wealth of content we would be covering under our two broad headings of communication skills and meetings.

The offsite was highly interactive and practical. Participants were asked to consider Moments of Truth which formed the basis of the practical work. Those moments included delivering the opening remarks of a key presentation, handling a Q&A session, dealing with a dominant contributor in a meeting,

facilitating a conversation around an important topic, getting a message across to a culturally diverse audience etc. We explored these moments with two panels – made up of a cross-section of the client's representatives in terms of gender, seniority, expertise and culture. The panels assisted us by bringing their insights to the day's discussion, noting any gaps they observed between best practice and reality – and also the practical approaches they've developed to maximise impact and success.

## IMPACT:

All team members left the offsite feeling that they were now better equipped to lead meetings and successfully communicate internally and externally. The team was also stronger as a result of the offsite – it provided an opportunity to bond, share an understanding of challenges mutually faced and work collaboratively. Working together the team produced a document defining best practice for meetings and a set of communication protocols to which they all agreed to commit.



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For further information on how FTI Consulting can assist you in designing and delivering engaging offsite events, please visit

[fticonsulting.com/offsite-events](https://fticonsulting.com/offsite-events)

### About FTI Consulting

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