



why retreats are a powerful ritual of high-performing teams

... and the seven principles involved to make them “force multiplying” moments

thoughts for leaders

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foreword:

At Perpetual, our Talent Development team have a wealth of experience in working collaboratively with clients to scope, plan and deliver impactful, memorable off-site events.

We also, however, seek to “take our own medicine” – knowing first-hand just how important such moments are for ambitious, high-growth, values-centric organizations. Indeed, we aspire to gather the whole Perpetual global company together every quarter in order to celebrate wins, review and reset strategic direction, reward exemplar behaviours, share knowledge and “best practices”, professionally develop and to generally check-in with each other and rejuvenate ourselves for the next “strategic bound” ahead.

Fresh from such an event (Lake Tahoe), this white paper seeks to explore the role of such retreats, when to consider having them, why they have the potential to be such potent team moments and the seven “success principles” that unlock their full force-multiplying benefit.

Whether you are considering a strategic retreat for your six-person leadership team or the powerful launch of a new strategic initiative with your entire 500-staff company, there should be something in this paper for you.

Happy retreating!

The Perpetual Talent Development Team

The Perpetual Talent Development Team.

the role of the corporate retreat – why bother?

Before we dive into the success principles, let's take a step back and explore the role of the corporate retreat¹ and the "why bother?" question.

We, perhaps, also need to recognise right up front that, for many companies, the concept of "corporate retreats" are somewhat besmirched. This may be due to an association with more prosperous times – as possibly even tarnished by

moments of embarrassing corporate largesse. Maybe, in your experience, they were really just an excuse for an executive get-a-way with minimal pretence for any meaningful output?

If you, and your top team colleagues, have a similar (pejorative) perspective on the matter, we would strongly encourage a re-evaluation. In the increasingly VUCA (volatile,

uncertain, complex and ambiguous) nature of business operation – coupled with the empirical fact that executive teams regularly overestimate the level of contextual clarity that exists amongst themselves – there has never been a more pressing strategic backdrop for (well-executed!) corporate retreats.

So, back to the core question: why bother?

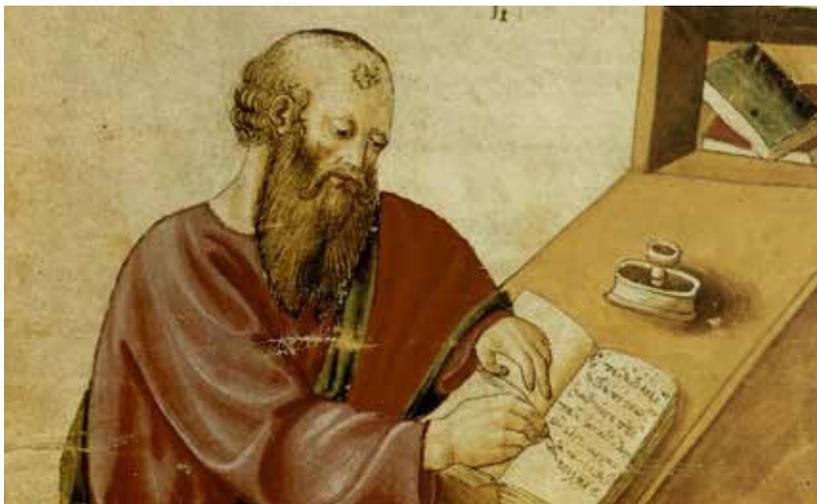
To answer, let's go right back to the ancients.

Aristotle – and for now, let's excuse him his 2,300-year-old gender asymmetry, famously said:

Man is, by nature, a social animal.

There was much behind this line; indeed, it sat at the heart of his huge body of philosophical thought and, at its essence, was central to his view of human nature.

Aristotle felt that for humans to flourish they need to reside in orderly, rational communities which



¹We use the term "Retreat" throughout this paper but please note this word bears no special meaning in and of itself; multiple other terms exist (e.g. Huddle, Off-site, Escape) and each can be used interchangeably. The important points all pertain to what is actually achieved in this concentrated time together not what you call it.

Fundamentally, at the heart of high-performing teams and fast-growth companies are very people-and-values centric cultures.

create the conditions for human growth and “flourishment”. He envisioned, effectively, a circular relationship where humans live for the purpose and social nourishment they derive from communities – and communities seek to deliberately create these conditions.

If we replace “communities” with “teams, companies and the communities in which they reside” then Aristotle could have laid claim to being a world-class talent development specialist.

As talent development and high-performing team specialists, we totally know where Aristotle was coming from.

Fundamentally, at the heart of high-performing teams and fast-growth companies are very people-and-values centric cultures.

Even with all the modern technological enablement of highly-connected, location-agnostic communications channels and tools, humans flourish – primarily - as a function of human connection.

It is, of course, possible to build highly-collaborative and effective teams that span multiple geographies and time zones (i.e. that primarily reside in a state of virtual, operational connection) if, and only if, this human, physical principle sits at the foundation of such a team i.e. is acknowledged and invested in.

So, why bother?

Well, you should bother because you will only truly unlock your team, or company, potential if you regularly and systematically put everybody in the same physical space – to

hear the same message, from the same voice, at the same time. Whilst technology takes us close to this proxy it will never replace the very human, energy-galvanising, social effect of such interaction.

If you accept that fundamental premise – and believe us, you should² – then the corollary aspect to consider is the role of such moments: to what ends can such gatherings serve?

The answer to this is many-fold – as illustrated by our own broad experience in facilitating multiple such events for clients. The primary objective(s) of such a retreat can range from any of the following, non-exhaustive list:

- > *To take strategic stock – to review and reset a corporate/business unit/team strategy and plan;*
- > *To pressure test a strategic plan (via scenario role-play) to understand its impact on the business (see Perpetual’s War Gaming service offering);*
- > *To powerfully “cascade” an operational strategy/plan/objectives down through an organization/team (see our “Mission Alignment” service proposition);*
- > *To celebrate team success and briefing/energising everyone for the strategic period ahead;*
- > *To facilitate a high-performing team experience in order to continuously improve your team’s collective professional development;*
- > *To facilitate intra colleague-to-colleague feedback in order to massively accelerate individual growth;*
- > *To launch a major new strategic initiative and/or product/service launch;*
- > *To facilitate accelerated*

knowledge sharing across a disparate work force – emphasising the importance of colleague-to-colleague connections as the foundation of your knowledge management strategy;

- > *To simply, get to know each other better – professionally and socially;*

You, hopefully, get the idea. There are multiple moments in an ambitious firm/team’s journey where it just makes manifest sense to bring everyone together and the more systematic, regular you are with such collective conversations, the more successful you will be.

When to consider organizing a corporate retreat

As broad as the possible set of key objectives might be for such a retreat, so are the potential “trigger points” for organizing one.

You might want to consider such an event if there is a major strategic decision, or set of plans, to communicate and such quality time is required for everyone to fully understand the imperative and rationale behind this new course – to fully assimilate the implications and to cascade down the resultant action plans. A major new product launch might be an example of this.

At a smaller level, you might want to consider such an event when a new team has been brought together as the perfect time to build their interpersonal relationships and collaborative behaviours. Or, it might just be for such a small leadership

Or, it might just be for such a small leadership group to truly step back from the operational fire fight and to review, and re-forge, strategic direction.

²We can empirically show how it lies at the core of high-performing teams - as captured in our Team-to-Tribe T3 research. Please contact us to talk you through this fascinating linkage.



group to truly step back from the operational fire fight and to review, and re-forge, strategic direction. Or, to engage in service and product innovation.

We also observe many leading companies, that organize such retreats in a very regular, systematic way in order to keep the “drumbeat” of a high-performing culture. A common pattern in this regard might be an annual event to finalise and communicate business plans (fully cascaded from the board vision down to every employee) to quarterly events which focus more on team-development, personal/professional development, knowledge-sharing and general values reinforcement.

You most certainly want to consider such an event if there is just a general sense of operational stasis and meandering corporate performance.

As an ambitious organizational leader, in your bones, you will know when the timing is right.

The success principles

If you are now, or already were,

convinced of the benefit of such events (maybe you even have forming ideas for such a team occasion?) then you need, next, to fully understand what goes into making them successful.

The continuum between a “truly impactful and memorable” corporate retreat and the “get me out of here” variant is wide indeed and, unfortunately, far too many companies succumb to the poorly conceived, poorly executed, latter variant.

Bringing together such events can come with a significant cost; aside from the physical costs (accommodation, transport, venue hire, facilitation etc) there will always be a high opportunity cost (especially so if the assembled staff are sales-based or revenue-generating).

Don’t get us wrong. The cost-benefit return can be huge – notwithstanding these cost items – when events are expertly scoped, planned and delivered. But, conversely, if these principles are ignored, then you will inevitably conclude that the spend really wasn’t justified. Indeed, poorly

executed events can take teams and companies backwards – as the resultant energy will be just to revert back to operational stasis (i.e. no future investment in such events) which will inevitably curtail your full high-performance potential.

The best events have a very clear summary theme and a set of stated objectives.

So, what separates the average-poor retreat from a truly exemplar, force-multiplicative event? The answer lies in the following success principles.

Success Principle 01: Develop a clear theme and set of objectives

The best events have a very clear summary theme and a set of stated objectives.

By example, our recent Perpetual annual retreat was themed as “Passion and Togetherness”. These describe two high-end attributes in our team high-performance model

(Team-to-Tribe T3) that we facilitate our client colleagues through.

We are humble enough to know that the Perpetual team is on a "Never settle" journey also; that is, we need to constantly reflect on our own performance and address areas of collective improvement. In summary, our (ongoing) ambition to be the most effective team we can be was the core of this year's annual retreat.

A well-conceived theme provides the summary ethos to the event but also allows each delegate to apply their own personal interpretation to the topic.



Figure:
Example Retreat theming | Perpetual's 2020 annual retreat logo

A well-conceived theme then sets the tone and strategic direction for the rest of the event planning and, done well, can visually bleed into multiple other aspects of the retreat; for example, as contingent on budgets: presentation templates, branded clothing and gifts and even venue/space dressing.

Aside from a clear theme, you should be explicit about the objectives you seek to achieve in this precious, co-located time together.

It is perfectly reasonable to have multiple such objectives (e.g.

communication of strategic plans, professional development, reward and recognition, fun!); indeed, the best retreats often have a very rich, balanced set in this regard.

As soon as you can, make these objectives explicit.

Success Principle 02: Project planning

Next up and, ideally, with plenty of time - as relevant to the scale and ambition of the retreat - you need to initiate the event project planning team and allocate explicit roles and responsibilities accordingly.

By way of simple example, for our main annual such events, we might look to put a team together to start location/venue searching and initial theme planning, say, nine months in advance. For our more regular, quarterly gatherings we might start to plan these two months out. Typically, there will be an overarching, accountable event project lead with a small team of colleagues in support. As we get closer to the event itself, many of the firm will be tasked with leading specific sessions - but this all under the auspices of project team coordination.

It often makes sense to break the project planning down into two primary workstreams: event logistics (event sourcing, transport, accommodation and virtualising) and event agenda/content development.



Perpetual's Talent Development team offers both services - as very separate capabilities to our clients.

Project planning tools can really enable this part of the process.

Best practice entails creating a project charter which includes overall aim, objectives, theme, role clarity (RACI), timelines, outline

agenda, etc. This document is then used as the backbone to the planning process and is updated at the regular progress check-in meetings.

We also use a great solution (Method Grid) that enables tight project/task management of a comprehensive event-delivery methodology and checklist we have developed over time as a result of multiple experiences. Whilst every event will be uniquely different, 80% of what needs to be considered and managed is thematically the same - so this type of solution can work really well - especially so if you seek to embed this capability within your business.

So, with your event project team in place - clear as to their roles and responsibilities - next up is a central question: "where?"

Success Principle 03: Location, location, location

This principle is, of course, of paramount significance.

Corporate retreats are seeking to break a pattern, to create the conditions for quality thought, collaboration and action.

In this regard, the chosen location matters for a few fundamental reasons.

Firstly, to state the obvious; it matters because you have to get people out of their everyday, operational mode. Corporate retreats work best "off-site" because they - at a very physical level - signal the opportunity to work "on the business" as opposed to "in the business" per normal, operational existence.

Secondly, as is often the case, a key function of a corporate retreat is to bring an otherwise disparate, geographically-dispersed team together. In so doing, careful thought clearly needs to be applied to an

optimal, central location.

Thirdly – and this one is really important – your chosen location will set the tone and vibe for the precious days together. The immediate environment (in terms of space, climate and views) and, indeed, the aesthetics and ergonomics of the chosen venue(s) will all play a massive – subliminal – role in the overall mood and tenor of the retreat.

This doesn't by the way mean that your chosen location need be expensive or airmiles dependent (always important sub-factors); indeed, some of the most successful retreats we have experienced, deliberately opted for rustic, self-catering as opposed to five-star, corporate hospitality.



If your retreat does involve air miles you might want to consider donating to a climate

protection project in order to offset your CO2 emissions. Organizations like atmosfair.de use these contributions to help develop the take-up of renewable energy solutions in developing countries especially.

There is no necessarily direct correlation between location preference and expense; there is something inherently human (back to Aristotle) about all mucking in together if the overall environment is clean-aired and "away from it all". There is also something qualitatively different about being self-contained as a team (sole use of a premise) in contrast to just being one of multiple parties in a large, faceless hotel.

There are, of course, multiple facets to the location consideration but the key point we are making is to take this sourcing really seriously (we harness our own internal event sourcing experts).

Build a bank of options and, ideally, conduct a reconnaissance of the shortlist – promotional websites rarely tell the whole picture. As someone

smart once said: "time spent in reconnaissance is seldom wasted".

With respect to the actual venue itself, the perfect space will have a variety of areas and rooms that can optimally host, indeed inspire, the session's objectives. By way of example, the capacious ski lodge in which we had our recent Perpetual event could not have been more inspired: a small cinema for formal presentations (wow effect achieved!), an eclectic cluster of sofas and chairs, around a log fire, for more intimate team discussion and a lake-view veranda for unforgettable social moments. It was clear that the event team had searched far and wide for such a special location and the benefits of doing so were huge.

So, think laterally and be open to pushing people out of their usual comfort and corporate patterns. If you simply return to the normal tired, anaemic location you are likely to experience the same tired, anaemic outputs. This really is your chance to find something with real "Wow!" potential, a location that will – quite literally – set the scene for overall success.

Success Principle 04: Develop a full but balanced agenda

Aligned with success principle 01, once your objectives are framed you can start to develop the retreat agenda. Getting this right is where the magic really happens.

A variety of session and pace really helps keep everyone's interest and energy levels high. We always encourage our clients to err on the side of full days (and evenings); such collaborative, co-located moments are rare so the overall ethos should be one of "squeezing every drop of value" out of the time spent together.

There is often a deft balancing act to be played when setting the agenda. You should consider the flow of each day – placing sessions requiring more mental concentration and energy earlier

in the day and becoming more collaborative and social as natural energies wane.

Physical activity is a great way to keep energy levels high and as long as you are sensitive to the inevitable range of human shapes and sizes in your team – there really can be something for everybody to enjoy. At one level, simple energizers and stretches get the blood moving post a sedentary session; at another level you might want to schedule optional pre-breakfast group exercise or whole-team outdoor excursion.

Nearly every successful retreat will also carefully allocate time for simple social interaction – often the most valuable shared time is when colleagues simply catch up with remote peers and update on home and family news. At Perpetual, we have a value "Look Up" which, whilst covering multiple aspects, is essentially of human interest and compassion: is Lauren planning another half-marathon this year?, how is Shannon's daughter getting on at Boston College, how is Pierre's house move going? An integral, enduring positive outcome of a well-run retreat will be that everyone has had the opportunity to renew and reinvigorate their knowledge of fellow colleagues (way beyond the mere professional sphere).

This colleague-to-colleague interaction is, of course, also of paramount importance on the professional sphere. We have helped clients facilitate incredibly powerful knowledge management sessions (market fairs or "speed dates") where everybody comes away with a magnified understanding of who-knows-what in the business. This, in turn, from a knowledge management perspective fuels a really powerful collaborative effect when back at the office ("my client needs help with X ... oh ... I remember which colleague to call to help me with that now" type moments).

There are multiple other considerations to an optimal agenda. For example, the length of sessions (experience will dictate the

right balance between being too rushed to derive any meaningful output and so long as to lose the audience), mandatory versus optional sessions and the allocation of session leads (this is a great opportunity to share the load, hear from new voices in the team etc).

As your agenda starts to form, per principle 01, for each session identified, start to capture the specific session aims: the “what” you seek to achieve and the “why”. The more these link back to, and reinforce, your overall retreat objectives – the more successful an event it will be.

The axiomatic point to take away from this principle is that the art of agenda scheduling is critical and deserved of fulsome time – starting well in advance of the event itself – to get it right.



As another practical “top tip”, we always follow up our retreats with a detailed

attendee questionnaire that feeds into an event team lessons-learned “wash up” and write-up (for the benefit of the next event delivery team!).

What did we learn from that delivery experience? What worked really well that can feed into the next event of this nature? What changes would we make to the agenda if we did this type of retreat again? Etc.

Success Principle 05: Harness experienced facilitators

A well-chosen venue and enticing agenda are, of course, for nought if the actual facilitation of the event is mediocre.

Delivering such events – optimising the mood and energy (as relevant to the session), keeping timings on track, the presentation of key messages, facilitating (often complex) discussion and generally ensuring that individual and



collective goals are all being met – is a highly-skilled endeavour!

Whilst you will want to make the contribution into sessions as broad as possible (retreats are a great opportunity to hear multiple voices), give very careful consideration to the overall facilitation team. Even if such capabilities exist in your business (they often will), you might still want to consider external expert facilitation as this will allow such colleagues to fully participate in the core content of the retreat.

If you decide to harness external support, ensure such co-collaborators are brought in early to the process – to help shape the structure and agenda of the event. Experienced facilitators will, invariably, have a myriad of advice, tips and suggestions in this regard – that can help meld an average event into a truly unique occasion.



The collaborative visioning-scoping-planning and delivery of corporate retreats

is a core service offering for the Talent Development team at Perpetual. Our carefully-recruited event facilitators have, collectively, hundreds of person-years of experience delivering a multitude of such events varying between intimate senior board team

“strategy away days” to multi-hundred staff conferences and everything in between.

The Talent Development team have, as a commonality, deep facilitation experience and skill sets but additionally a range of secondary skill areas that we can resource to client events as contingent on the nature of the event. For example, organisational psychology and team-development (as relevant to high-performing team events), corporate strategy (as relevant to “mission alignment” sessions), personal effectiveness (as relevant to professional development) etc.

As per principle 03, we also have inhouse experts adept at sourcing venues and overseeing, with real attention-to-detail all of the logistical aspects of an event (transport, accommodation, virtualing etc.). This sister expertise works well as an adjunct to the core facilitators (we often manage both aspects for clients) allowing as it does for the expert-facilitators to focus on event/content excellence (knowing that all such logistical aspects are in professional hands also).

Success Principle 06: Connect with the community

Corporate retreats – especially so longer ones – are a great opportunity to visit parts of the world (even in your own country) that you might otherwise not readily see.

Our facilitators have certainly had the privilege of working in some amazing locations (everything from a Kasbah in the Atlas Mountains, a refuge in the forests of Northern Finland to a game lodge in Kenya). This needn't involve airmiles either; we are constantly amazed at the many quirky, interesting locations within local and regional reach. The point is rather that the "difference factor" can really add to the texture of the event and the sense of escape from everyday operation. There is nothing like fresh air and natural views to really lubricate those strategic and innovative thoughts.

If you do have the luxury of hosting the event somewhere culturally afar from your normal operating location, you can take the event to another level by really connecting with the local community during your brief

residence. At one level, this might just be getting out to see the local area (especially so for group activities) and, at another level, it could even involve some form of social responsibility link and volunteer working. The principal point is just to design into your event an active interest in, and connection to, the history, culture and residents of the place you are in.

With respect to this success principle, pre principle 03, we would really recommend a prior reconnaissance during which you make best effort to make these local contacts. As they say, "seeking local knowledge" really is the best way to get to know the "lie of the land" and to search out those really special event/location ideas way off the normal trail.



Our Talent Development facilitators can talk about the hundreds of such magical moments they have helped deliver in this regard – to help fuel your own innovation.

For example: the company that hosted their event in the snow-covered mountains and

then one-evening announced a surprise evening component. Everyone was bundled into minibuses with no idea of where they were heading – just drivers briefed. Driving through heavy snowfall, the mystique went up a number of notches when they were told to disembark in the middle of a narrow forest road – as sunset fast approached. Silence. Cold. Heavy snow. Then, from out of the woods, down the mountain slope, a convoy of skidoos that arrived to pick everyone up and take then back up to the mountain top and a summit lodge restaurant opened exclusively for their team.

The location had been sourced on a prior recce by the event team lead. Making friends with a number of local characters it had been explained to him that this place was very special and really own known/ used by locals. With such early relationships built, however, a number of people came together in the local community to help deliver this extraordinary evening.

With drinks flowing, snow falling, incredible high-mountain cuisine and even a guitar-led sing-along (exploit your team's talents!) it was a memory that every participant would take to their grave. At the very least, it was a remarkable sign-off to a very successful corporate retreat: on the back of which that company experienced phenomenal staff engagement and commercial growth.

Success Principle 07: Create team stories!

We specialise in facilitating senior executive teams and wider operational teams in leading companies through high-performing team programmes (see our Team-





to-Tribe T3 programme for example). An upper-order attribute of high-performance in this regard is very values-centric organizations that work hard to constantly facilitate new team stories.

What do we mean by this?

Well, a key characteristic of high-performing teams is that team members have a knowledge of their colleagues that extends beyond the simple domain of their professional contribution. They will know and take an interest in each other's lives outside of work; they will - further - really enjoy the social company of their colleagues. The more these relationships enter a human domain (remember our friend Aristotle again), the more networked is your team's inherent loyalty and trust levels. High-performing teams are committed to their companies because they are committed to each other!

At the heart of this social equation are shared experiences and stories. For many workplaces, it is very difficult to create memorable such team moments and experiences (that can be recounted and shared). If your average day is largely spent processing information on a laptop, or prosaic meetings, then such story-generating

opportunity will be rare indeed.

This is, therefore, another reason why well-planned and delivered corporate retreats can be so rejuvenating - at a team and personal level. Especially so, if they generate a raft of stories that can be shared and enjoyed in the months and years ahead: "Do you remember that time that Paula tackled the abseil - utterly terrified to start - and then how she overcame the fear with everyone's support. Not sure I will ever look at our Head of Marketing in the same light ever again!".

You hopefully get the drift. If you do nothing else, seek to create positive stories from your retreats.

In so doing, you will have multiplied the potential connectiveness and forward-effectiveness of your team.

Summary

So, there you have it.

There are multiple reasons why corporate retreats can be a very powerful, force-multiplicative tool. A tool that truly separates leading, high-growth teams and companies from the mediocre masses.

Like most tools, however, poorly

handled they can fail to deliver the intended results. We have covered the core success principles; as a reminder:

- > **Success Principle 01: Develop a clear theme and set of objectives**
- > **Success Principle 02: Project planning**
- > **Success Principle 03: Location, location, location**
- > **Success Principle 04: Develop a full but balanced agenda**
- > **Success Principle 05: Harness experienced facilitators**
- > **Success Principle 06: Connect with the community**
- > **Success Principle 07: Create team stories!**

Give each due consideration and we guarantee the investment in such events will pay back handsomely in manifest directions: tangible and intangible.

happy retreating!

meet the perpetual talent development team...



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Nigel Robinson

Nigel spent his first career working in a variety of demanding environments. As an officer in the British army he implemented missions in countries such as Bosnia, Northern Ireland and the Middle East and subsequently delivered aid and development projects in Afghanistan, Sri Lanka and across Africa for the United Nations and not-for-profit organizations.

Today, Nigel uses his diverse experiences and an MBA in Strategic Planning to help his clients develop and execute strategies that will deliver extraordinary results. Working with global brands, Nigel supports executives to unlock the potential of their teams and chart a course for transformational growth that creates a legacy for all involved. Recent clients come from a variety of sectors including FMCG, financial institutions and the steel industry.

In his spare time, Nigel is passionate about sailing and skiing and he sits on the board of The HALO Trust, a not-for-profit organization that employs over 8,000 staff to clear landmines in post-conflict environments.



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Lauren Rath

As Senior Director in Perpetual's Talent Development practice, Lauren is responsible for the creation and delivery of bespoke training and development programs for our team at Perpetual and our clients. She partners with Leadership Teams to design a series of modular workshop sessions that can be configured to achieve the desired "shared understanding, collective will" outcome. In her role as Executive Coach, Lauren partners with clients to help them take thoughtful risks, confront challenges, create breakthroughs, and develop action plans to realize their intentions and aspirations.

Lauren has a cross-functional background from Procter & Gamble, combined with career coaching experience and program design at The University of Chicago. Lauren worked in account management, business development, strategic planning, event planning, and public relations across multiple beauty categories including prestige skincare, color cosmetics, and fine fragrances. During her tenure at the University of Chicago, Lauren worked with clients on building resumes, writing cover letters, systematizing a job search strategy, prepping for job interviews, and mastering the art of small talk to be successful in networking. Lauren's nine years on the client-side of the business, paired with her commitment to delivering excellent customer service, provides clients a best-in-class experience, and most importantly – results.

Lauren lives a life full of adventures, and enjoys staying active through scuba diving, skiing, sailing, and swimming, and loves traveling anywhere that facilitates any or all of these activities. She holds a graduate certification in Executive Coaching from Columbia University in New York, NY, and graduated with honors from Bucknell University in Lewisburg, PA. Lauren lives in Norwalk with her husband, Adam, and their adorable Cockapoo, Dunkin'.



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Duke Maines

Duke Maines has a history of success in enabling people and businesses to unlock opportunities to transform their organizations.

As a commercial leader, Duke built and led what is widely considered the best sales organization in the beer industry at Boston Beer Company—brewers of Samuel Adams. After starting his own brewery, he established Oregon Ale & Beer Co. as a top ten craft brand within just one year. All of this came after he paid his own way through University from the proceeds of a start-up t-shirt company.

Recognizing his true passion—and personal purpose—he began a career in learning and development which led to critical experiences in all areas of OD including leadership development, talent management, recruiting, workforce planning, change management, and internal communications. In this capacity, Duke has led change management efforts of two of the largest mergers in history as well as found unique and creative ways to help companies tap into their core purpose to accelerate culture transformation efforts.

Duke is an organizational psychologist who is known for introducing provocative interventions in an effort to accelerate change in organizations that offer products or services to which he is personally passionate. He has over 25 years of leadership development and change experience and has taught at such reputable institutions as INSEAD and Wharton.

His past positions include the Chancellor of Challenge, Emir of Excellence, Optimus Prime of Talent Maximization, and the Dark OverLord of Learning. These “official” titles provide a sense of the style, passion, and energy, Duke brings to any organization—especially those who want to enjoy life whilst they deliver exceptional results

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