

Offsite Planning Checklist

Effective Flow Connections

Planning an offsite can be overwhelming, but this checklist will help you stay organized and make sure you've covered all the essential details. Use this as a guide to create an unforgettable event that aligns with your goals and keeps your team engaged!



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Step 1: Define Your Objectives

- What's the purpose of the offsite (e.g., strategic planning, team building, creativity)?
- Who is your audience, and what do they need or care about?
- What do you want attendees to leave thinking, doing, or feeling?
- Set clear success metrics to evaluate the offsite's impact (e.g., alignment on goals, morale, action plans).

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Step 2: Plan Your Agenda and Content

- Create a draft agenda that balances education, team building, and work deliverables.
- Gather input from your team and refine the agenda based on feedback.
- Include interactive elements like discussions, brainstorming, and Q&A sessions.
- Incorporate updates from leadership or external experts, if applicable.

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Step 3: Manage Logistics

- Book accommodations, meeting spaces, and transportation.
- Plan meals and snacks, accounting for dietary restrictions.
- Secure technology (projectors, microphones, AV equipment).
- Prepare small items: power strips, notebooks, pens, flipcharts, nametags.
- Test all tech for virtual or hybrid formats, including breakout rooms and video quality.

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Step 4: Prepare for the Unexpected

- Have contingency plans for tech failures, weather disruptions, or last-minute changes.
- Assign a point person for troubleshooting on the day of the event.

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Step 5: Follow Up and Evaluate Success

- Review success metrics to evaluate the offsite's impact.
- Send a summary of key takeaways and assigned action items.
- Collect feedback through surveys to improve future offsites.
- Celebrate contributions and communicate the value of the offsite.