

The Definitive Guide to Offsite Planning



Insider's guide to running the perfect offsite

Practice makes perfect, but at Peerspace we like to get things right the first time around. With this checklist you'll ensure your offsite runs smoothly from start to finish. Use the checklist to prepare a perfect offsite with 10 professional tips to guarantee success!

Task	Due	Status	Done
 Define offsite details To get started on your offsite, solidify your needs, define the details and set the budget. Consider the best date, time and location that work for the team.			
 Brainstorm and discover If it's a repeat event, solicit feedback from several employees in different departments. What worked well? What didn't? What's worth repeating?			
 Pick a creative space Think outside the box to book a unique space that will inspire. The physical surrounding of your offsite is crucial to sparking innovation and success.			
 Determine your goals Set up a strategic offsite with clear objectives so it's productive and provides a worthwhile investment for the entire team.			
 Focus on growth Approach using the offsite as solution-based time to propel your business needs forward. Reference your goals and ensure the team is set to generate new material.			
 Finalize a detailed schedule Space meetings to avoid over-packing the offsite schedule. Discussions and workshops might spill over their allocated time, so plan breaks accordingly.			
 Cover food, coffee and drinks An offsite is not complete without a meal (or two) and plenty of coffee. Avoid the stress of ordering catering and let the Peerspace Concierge take care of it for you.			
 Set up smoothly Planning ahead pays off. Ensure the amenities are set up and coat racks, snacks, water and coffee are available.			
 Clean up and Break down Ensure all team members belongings are accounted for. Clean up the space or break down any equipment as necessary.			
 Recap and review to track ROI Congratulations, you made it! After the offsite is complete, have employees give constructive feedback and review the progress that was made.			

Need help planning your offsite?

We love seeing innovators and creatives bring their ideas to life. That's why when you book your offsite location through Peerspace, you'll get FREE access to our professional Concierge Team. We would be happy to help you get started today. All of our listings can be viewed at [Peerspace.com](https://peerspace.com) and our Concierge can be reached at concierge@peerspace.com.



Define offsite details

- To get started on your offsite, solidify your needs and define the details. Consider the best date, time and location that work for the team as well as the budget for your meeting.
- If your offsite requires multiple hours, start in the morning when your team is fresh and more productive.
- If your offsite requires multiple days, schedule it towards the end of the week. This will give your team a smooth transition into the weekend instead of a jolt back into the office.
- Book necessary flights or driving services early to help cut costs, and make sure to inquire about group rates or corporate discount.
- Did you know that booking flights on Monday or Tuesday mornings yields the best pricing (assuming there's ample lead time). Try it next time you book.

Notes



Brainstorm and discover

- If it's a repeat event, ask for feedback on previous offsites and meetings from other team members. Understand what went well that they would like to see happen again, and what changes can be made to make the next event even more successful.
- Brainstorm with team members from different departments. Bringing in a variety of perspectives will provide for a broad range of input and empower members that their roles add value.
- Ask important questions of your team members regarding past events, meetings and offsites: What worked well? What didn't? What's worth repeating?
- If you have not held this type of event in the past or want a completely new approach conduct research. Seek to discover new team-building activities, generative exercises and problem solving approaches.

Notes





Pick a creative space

- The physical surrounding of your offsite is crucial to achieving success and you can boost results with a creative space. Think outside the box to book a unique location that will inspire your team.
- Traditional offsite locations such as hotel conference rooms are often lacking in views, fresh air, comfortable seating and innovation. Creative alternatives such as lofts, galleries or collaborative working environments can inspire your team.
- When selecting your Peerspace space, review all the listing photos to ensure it's the right fit. Double check it has the amenities you need.
- You can ask the host for additional information to understand setup for past offsites, or reach out to the Peerspace Concierge team for more insight.

Notes



Determine your goals

- Encourage creating offsite objectives and goal-setting. When you set measurable goals that have a clear impact on your bottom line, you can easily track the success of your offsite.
- Set up a strategic offsite so it's productive for your business needs and provides a worthwhile investment.
- While team building is an important aspect of most offsites, keep group exercises and conversations strategic. This will help generate lasting results in your company's growth.
- Focus on exercises that can result in fresh marketing collateral, consumer insight or product features. Keep activities generative and conversations positive.
- Encourage device-free sessions and put away laptops, tablets, and phones. It can be distracting when one person plugs in and everyone else feels inclined to "multi-task" too.

Notes





Focus on growth

- Offsites can be an opportunity to solve office, service and product problems. However, aim to keep discussions positive and structured on generating new ideas and growth.
- Approach using the offsite as solution-based time to propel your business needs forward. Make sure the team is set to reach their objectives.
- Send out an email before the event encouraging your team to use positive statements and goal-setting to help members think proactively.
- Remind your team of the ways in which positive feedback can be more beneficial than pointing out existing issues.
- Encourage attendees to bring ideas for solutions. Refocus discussions or reframe questions to focus on honing in on the best case scenario.

Notes



Finalize a detailed schedule

- While you want to make the most of your offsite and maximize every moment, avoid over-packing your team’s schedule.
- Place small breaks between meetings and events. Chances are discussions and generative workshops might spill over allocated time.
- Determine the perfect mix of work and fun for your company culture. Evaluate when “play time” is most valuable and whether that is during, or after the offsite.
- Send the finalized schedule to employees attending the offsite so they can familiarize themselves with events and prepare for activities or leadership sessions they are running.
- It’s a fact that people drift and loose focus in the 2-3 pm window. Consider accounting for this and add a small catch up break period where people can get coffe, check email or make a phone call.

Notes





Cover food, coffee and drinks

- An offsite is not complete without a meal (or two) and plenty of coffee. Your team needs to be well-fed and caffeinated to get them through the day.
- Since coordinating meals and ordering for a group is time consuming, use a service to provide snacks, coffee and full meals.
- Ask for restrictions or allergies in your group ahead of time to ensure your team is taken care of.
- Let the host know of catering plans and delivery times in advance so they are aware of building entries. Ask for restaurant recommendations if your offsite runs into the evening or covers multiple days.
- Set out chocolates and gum. People like to have something to munch on and chewing gum helps maintain focus and better remember discussions.

Notes



Set up smoothly

- The day before the offsite, email a fully updated schedule to the group and print out extra copies to have on hand.
- If you are attending the offsite, arrive early and ensure all electronics and Wi-Fi are functional.
- Before your team arrives, post signage around the space if necessary. Check that coat racks, snacks, water and coffee are available.
- Running the offsite remotely? Have the Peerspace Concierge take care of your signage and catered food delivery. If you are not personally attending.
- Print off a few cards with the network and Wi-Fi password to circulate, or write details on a white board.

Notes





Clean up and break down

- Ensure that you clean up as necessary. In some cases it might be covered by the venue or an outside cleaner, but depending on your offsite location, you might be responsible.
- Break down your presentation, AV and tech equipment and store safely for transport. If you used easels or paper pads for brainstorming, make sure to collect them from the team for later review.
- Do a thorough sweep of the offsite location before leaving. It's possible that a team member forgot something, so be on the lookout for jackets or laptops.
- If applicable, lock up or follow Host guidelines. Leave the space as close to how you found it as possible.

Notes



Recap and review to track ROI

- Congratulations on completing your offsite - You made it!
- Ideally the team leaves with a better understanding of business goals, as well as one another but it's important to ask for constructive feedback.
- Put together a memo that outlines what you covered in the offsite. Having new ideas in one place will be helpful.
- Follow up with your team to carry that positive energy forward until your next offsite. Don't forget to track the ROI.
- Conduct a review of the offsite or send out a survey to team members. This will be helpful in planning future events (back to step 1). Make sure to ask: What worked? What didn't? What's worth repeating?

Notes

