

Strategy Offsites: A Practical Guide to Design and Facilitate Transformative Events

Pre-Event Planning Checklist

1. Define Clear Objectives and Desired Outcomes

- ☐ **Clarify the Purpose of the Offsite:** Define the strategic objectives of the offsite and what you want to achieve by the end of the event (e.g., setting strategic priorities, aligning leadership on new initiatives, addressing key challenges).
- ☐ **Identify Specific Outcomes:** Specify what success looks like. For example, “Develop a new market expansion plan” or “Align on a three-year product roadmap.”
- ☐ **Communicate Objectives to Participants:** Ensure that all participants are aware of the offsite’s purpose and objectives so they can come prepared to contribute to the discussions.

2. Select and Invite Participants

- ☐ **Identify Key Participants:** Determine which team members, stakeholders, and external facilitators (if applicable) should attend the offsite. Ensure that all decision-makers and subject matter experts are included.
- ☐ **Send Invitations and Confirm Availability:** Send invitations well in advance, clearly outlining the event’s objectives, location, and dates. Confirm participants’ availability and ensure that they have blocked time in their calendars.
- ☐ **Brief Participants on Their Role:** Provide a clear briefing for each participant on what is expected of them, including any presentations, data, or insights they may need to prepare in advance.

3. Select the Right Facilitator(s)

- ☐ **Choose a Facilitator (Internal or External):** Decide whether the facilitator will be internal or external. For high-stakes offsites, consider hiring a professional facilitator to ensure objectivity and smooth session management.
- ☐ **Clarify the Facilitator’s Role:** Define the facilitator’s responsibilities, such as guiding discussions, managing time, encouraging participation, and ensuring that the group stays on track.

4. Establish Date, Duration, and Location

- ☐ **Set the Date and Duration of the Offsite:** Select dates that work for all key participants and determine how long the event will last (e.g., one day, two days, etc.). Consider whether a full-day or multi-day event is necessary based on the complexity of the agenda.
- ☐ **Choose the Ideal Location:** Select a location that is conducive to strategic thinking and collaboration. Ensure that the venue offers a comfortable and distraction-free environment. Consider factors such as accessibility, room size, and on-site accommodations if needed.
- ☐ **Confirm Venue Logistics:** Verify all venue logistics, including room setup (e.g., U-shape, theater style), technical equipment (e.g., projectors, Wi-Fi), and any special requirements (e.g., breakout spaces for smaller groups).

5. Design the Agenda

- ☐ **Structure the Offsite Flow:** Plan the flow of the offsite to balance presentations, discussions, and interactive sessions. Make sure the agenda allows for breaks and team-building activities if appropriate.
- ☐ **Allocate Time for Key Topics:** Prioritize the most critical discussions and allocate sufficient time for each one. Ensure that there is enough flexibility in the agenda to accommodate spontaneous discussions.
- ☐ **Share the Agenda in Advance:** Send the agenda to all participants well in advance so they understand the event's structure and can prepare accordingly.

6. Assign Pre-Work and Homework

- ☐ **Distribute Pre-Reading Materials:** Send participants any relevant materials (e.g., reports, market analysis, data) before the offsite so they can review and come prepared for discussions.
- ☐ **Assign Pre-Work:** If necessary, assign specific pre-work tasks, such as brainstorming ideas, preparing a presentation, or completing a SWOT analysis.
- ☐ **Set Deadlines for Pre-Work Submission:** Ensure that any pre-work is completed and submitted by participants well before the offsite begins, allowing time for review.

7. Prepare Materials and Handouts

- ☐ **Create Presentations and Materials:** Ensure that all presentations, data sheets, and materials are prepared and ready for the offsite. This includes slide decks, financial data, and strategic documents.
- ☐ **Print or Distribute Digitally:** Decide whether materials will be printed for in-person distribution or shared digitally for virtual attendees. If distributing digitally, ensure that all participants have access to the necessary platforms (e.g., Google Drive, Microsoft Teams).
- ☐ **Prepare a Participant Pack:** Consider preparing a participant pack that includes the agenda, pre-reading materials, and any key documents they'll need during the offsite.

8. Confirm Technical Requirements

- ☐ **Set Up Audio-Visual Equipment:** Ensure that all necessary technical equipment is ready to go, including projectors, microphones, screens, and sound systems. Test these ahead of time to avoid technical issues during the event.
- ☐ **Prepare Virtual Meeting Platforms (if applicable):** If any participants are attending virtually, set up the necessary video conferencing tools (e.g., Zoom, Microsoft Teams) and test them to ensure a smooth experience.
- ☐ **Check Internet Connectivity:** Ensure that the venue has reliable internet access for both presenters and participants.

9. Plan for Accommodation and Transportation (if needed)

- ☐ **Book Accommodation for Participants:** If the offsite requires participants to stay overnight, book accommodations early. Ensure that the venue is convenient and comfortable, and that all logistical details are confirmed.
- ☐ **Arrange Transportation (if applicable):** If participants need transportation to the venue, arrange shuttles or provide information on public transportation options and directions.

10. Plan Catering and Dietary Considerations

- ☐ **Select Catering Options:** Arrange meals, snacks, and refreshments for the duration of the offsite. Ensure that meal times are built into the agenda and that food is provided at appropriate intervals.
- ☐ **Accommodate Dietary Restrictions:** Confirm any dietary restrictions or preferences from participants and ensure that the catering options meet these needs.

11. Establish Ground Rules and Expectations

- ☐ **Set Ground Rules for Participation:** Communicate any ground rules, such as limiting distractions (e.g., phone usage), encouraging open dialogue, or maintaining confidentiality during discussions.
- ☐ **Clarify Decision-Making Processes:** Define how decisions will be made during the offsite, whether by consensus, voting, or leadership directive. This ensures clarity and keeps discussions productive.

12. Confirm Attendee Communication and Reminders

- ☐ **Send Event Reminders:** Send a reminder email to participants a few days before the offsite, including any last-minute details (e.g., directions, parking, final agenda).
- ☐ **Provide Contact Information:** Share the contact details of the event coordinator or facilitator so that participants can reach out with any last-minute questions or concerns.

13. Prepare for Follow-Up

- ☐ **Plan Post-Offsite Follow-Up:** Prepare a plan for distributing meeting summaries, action plans, and any follow-up materials after the offsite. Schedule post-event meetings or check-ins to ensure that the action plan is executed.
- ☐ **Assign Ownership for Follow-Up Tasks:** Make sure that someone is responsible for gathering feedback and managing post-offsite follow-up, including progress tracking on action items.