



# how to

# Plan an Offsite

FOR MANAGERS WANTING TO GATHER THEIR  
TEAMS OUTSIDE OF THE NORMAL RHYTHMS OF  
THE WORK WEEK



**"WHEN WE DON'T EXAMINE THE DEEPER ASSUMPTIONS BEHIND WHY WE GATHER, WE END UP SKIPPING TOO QUICKLY TO REPLICATING OLD, STAIID FORMATS OF GATHERING. AND WE FORGO THE POSSIBILITY OF CREATING SOMETHING MEMORABLE, EVEN TRANSFORMATIVE."**

**-THE ART OF GATHERING, PRIYA PARKER**

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## **What is the purpose of the offsite?**

Why are you wanting to have this time together? Is it to increase collaboration? To plan for the upcoming quarter? Is it to have intensive working session time to solve specific problems or drive projects forward?

A clearly defined purpose is critical to success. Everything stems from the purpose.

## **Define Success**

When the offsite has concluded, what will make the team say "Wow that was awesome and a great use of our time!"? Be super specific here. What are the outputs you are trying to achieve? Example: increase productivity by 20% due to better alignment among team members.

## **How Are You Measuring Success?**

Once you've defined what success looks like. how are you going to measure it? How do you know you were successful? If you don't have clear performance metrics for your goals, I recommend you using a series of surveys starting with a baseline survey before the offsite.



## What is Your Strategy?

How are you going to achieve the goals set for the offsite? Where should it be? When? What is the physical set-up? What's the agenda? Who is attending?

## Project Management

Once you have a plan, who is project managing this? Who is coordinating reservations, food, materials, etc?

## Other Things to Consider

1. The location should match the energy and needs of the team
2. The attendee list needs to be exclusive - don't add in peripheral people who aren't core to the purpose of the offsite
3. How long is the event? How many days? How long for each day?
4. Ensure that every bit of time scheduled is intentional and aligns with the purpose.
5. Are any of the attendees going to be celebrating a birthday or work anniversary during the offsite?
6. If you have more than 12 attendees, you need to break into smaller groups for discussion time.
7. Have a designated facilitator to guide conversations and someone to drive synthesizing the information and documenting action steps.
8. Be mindful of needs: food restrictions, physical restrictions, etc
9. Try to limit or remove the need for alcohol.
10. Keep team building activities during the day when people aren't exhausted.

Hi!

I'm Erin!

Offsites are such an incredible tool for collaboration, building relationships, reducing conflict, creating alignment, and problem-solving.

But they have to be done with the utmost clarity of purpose.

Too many companies invest \$\$\$ in events that not only drive zero progress, they wind up leaving the team members more frustrated.

I want you to successfully leverage time together to achieve your goals and lead your teams to high performance.

Be sure to check out my Mini Drop on this topic for additional guidance!



**MANAGER**  
**MATERIAL**

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