

# 10 Tips for an Awesome Team Off-site



There are a lot of meetings and team off-sites out there. My hope is that they are the best, most kick-ass meetings the team has ever experienced. But let's get real, most off-sites are just not that great.

I've done a lot of research on how we gather and have years of experience gathering teams. I've curated a few of my favorite tips and tricks to create that amazing team experience you are looking for.



*Peach Cheesecake Ranch*





## #1. Take time to **PREPARE** for the meeting.

Getting a group of people to set aside a full day to attend your off-site is no small task, so make sure you are giving yourself and them plenty of time to prepare.

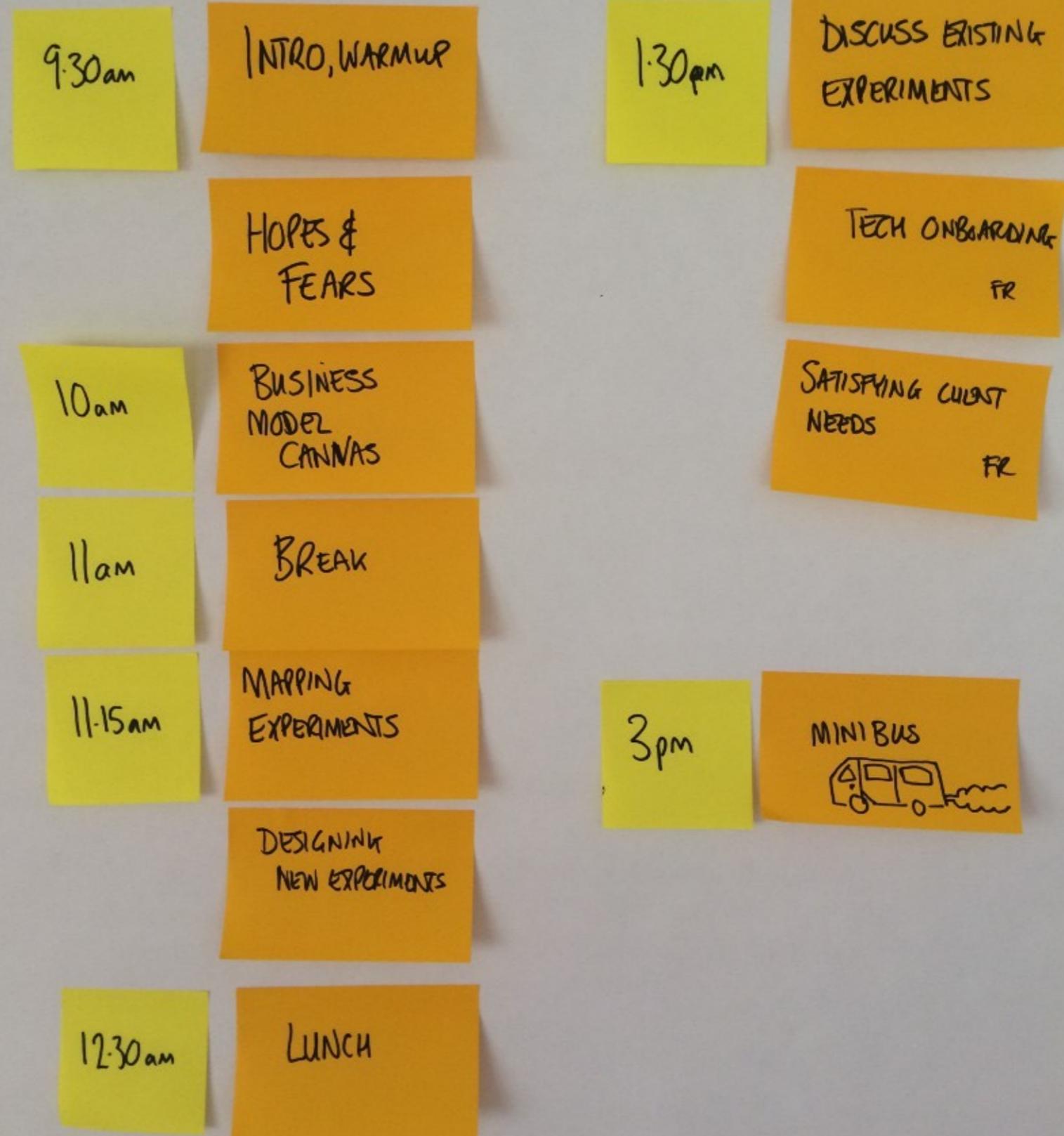
- Objectives - what are you trying to accomplish in this meeting?
- Who should attend? - to keep the meeting focused be strategic on who should attend, more is not better in this instance.
- Homework - give the team some homework, start getting them invested before they arrive. Make sure the homework is simple and will not take more than an hour to complete.
- This article from the Harvard Business Review [has a great planning tool](#).

## #2. You have to have an agenda.

A great agenda is key. Keeping your agenda flexible and focused. Less is more. There's a good chance you will not get to everything on your agenda, that's OK. Pay attention to the unscripted, deep, rich conversations, those conversations could just be more important than a topic you have slated later in the day.

Here's a practical way to keep your agenda flexible. Use sticky notes, this keeps the topics and time slots flexible.

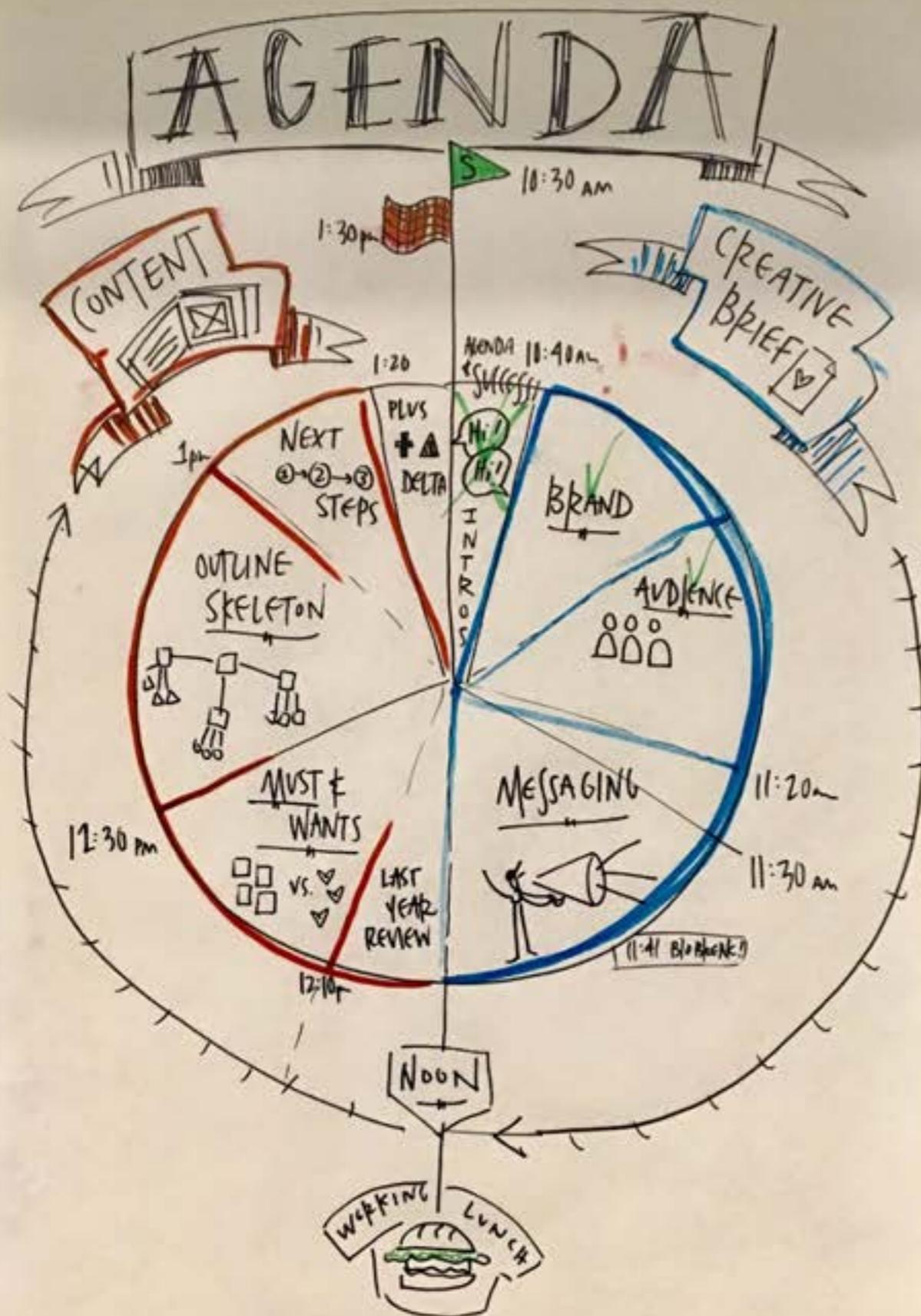
Photo credit: Medium - IDEO Stories by Nathan Waterhouse



## #3. CROWDSOURCE the agenda.

Gather anonymous input and suggestions from the people you'd like to attend a safe way to offer their input. Your team is going to be much more engaged in the off-site if they knew they had a hand in the creation of the agenda.

You can create a simple survey using [Typeform](#) or [Survey Monkey](#) to narrow down the focus of the meeting. You can take crowdsourcing even a bit further and invite other people from the team to own a part of the agenda.



## #4. Set clear **GROUND RULES.**

Setting up some simple ground rules and publishing them before hand is great way to help people show up fully and know exactly what is expected of them. Here are a couple to get you started:

- Create a safe place - what is said at the off-site stays at the off-site. People need to feel like they can be honest without fear of getting a slap on the wrist back at the office.
- Show up on time - you are likely going to try and pack a lot into your day. It is crucial people show up on time. One way to do that is to have an informal breakfast time slot in your agenda, this give people time to arrive, eat and get settled.
- Let others speak - Make sure that everyone at the table has an opportunity to have their voice heard. Don't let one outspoken person, keep others from having their say.





## #5. Change your **PERSPECTIVE**, get out of the office.

It might be easier to just do this meeting at the office and there are times for that. If you want your team to be engaged and come with an open mind, getting out of the office evens the playing field and gets the team away from the everyday office distractions. It can help them get out of the daily grind and into the possibilities.

## #6. Do it during **WORKING HOURS.**

Honor the fact that people have lives outside of work. If this off-site is important to the well being of the organization, then it's worth it to take work time to do it.





## **#7. Plan FUN activities that promote teamwork.**

Here's one example: Cooking together is a great way to promote collaboration. Then eating that meal promotes togetherness. Long before we were all in cubicles people came together in the kitchen and around the dinner table. Cooking together is very similar to working on a project.

The recipe is similar to a project plan. Who chops, who preps mimics roles and responsibilities. Getting the separate dishes of the meal done at the right time is like creating and following a schedule. And then you have a delicious meal to sit down and eat together.



## #8. Have plenty of DOWN TIME.

People will want time to check mobile devices and email. They will also need time to clear their heads and breathe. Look for a meeting space that you can use more than one room. Being able to have a small change of scenery can also change peoples perspectives.

Bonus: if the weather is nice, make sure to encourage the team get outside and breathe the fresh air. [There is research that shows just gazing at nature can make you more productive.](#)

## #9. Have a clear **CLOSING** activity.

Give the team time to reflect on the day, this takes time and is well worth it. One way to do this is to have each person call out one key thing they have gained from the meeting.

Outline clear actions with defined timelines. It's important to capture these actions as they come up throughout the day. At the end of the session, revisit your action items. Assign each action to a specific person and a set clear deadline for each.



## NEXT STEPS

- ☐ Meet with finance team  
- Tessy
- ☐ Update PTO section of  
handbook - Robin
- ☐ Distribute Ahas to the  
Leadership team - Brian
- ☐ Pick a date for next retreat  
- Dan

## #10. Plan to FOLLOW UP.

There is nothing worse than having a great off-site event where you made lots of great progress and commitments to only have them wash away as soon as you are back at the office. Make a plan and follow through.

- Plan a check in with the people that attended the off-site a month or two after to see how they are managing the actions assigned to them.
- Keep the action items visible to the team and actively check them off as they are completed.



## About Peach Cheesecake Ranch

The Peach Cheesecake Ranch is a creative retreat and meeting space where you can catalyze AND take action on your best thinking. Team Off-sites | Strategy Sessions | Team Building

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