



# Day Meeting Planning *Checklist*

A step-by-step process to  
ensure your event is a success



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## **Determine three date options:**

When reaching out to potential venues or participants, have at least three date options in mind to inquire about availability. This will help ensure flexibility and increase the chances of finding a suitable date for everyone involved.



## **Establish a minimum and maximum number of attendees:**

Determine the ideal range of participants for the meeting. Consider factors such as the purpose of the event, space limitations, and the level of interaction required. Having a clear understanding of the minimum and maximum number of attendees will assist in selecting an appropriate venue and making logistical arrangements.



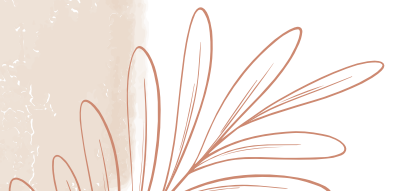
## **Define the goal of the meeting:**

Clearly identify and communicate the purpose and objectives of the off-site day meeting. Is it for strategic planning, team alignment, brainstorming, or training? Having a well-defined goal will guide the agenda and help participants understand the purpose behind the gathering.



## **Incorporate team building activities:**

Plan and organize team building events as part of the off-site day meeting. These activities can foster better communication, collaboration, and camaraderie among the participants. Choose activities that align with the overall goals of the meeting and the dynamics of your team.





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## **Select a suitable venue:**

Find a venue that suits the needs of your off-site day meeting, considering factors such as space availability, technical requirements (audiovisual equipment, Wi-Fi access, etc.), catering options, and any specific requirements for team-building activities. Ensure the venue can accommodate the anticipated number of attendees comfortably.



## **Develop a detailed agenda:**

Create a comprehensive agenda that includes the timeline for the meeting, breaks, team-building activities, and any special sessions or presentations. Share the agenda with all participants in advance, so they are aware of the schedule and can prepare accordingly.



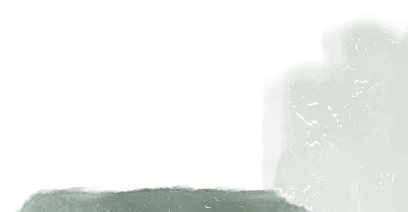
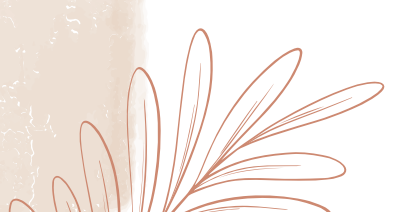
## **Coordinate transportation (if necessary):**

If the off-site meeting requires participants to travel to a different location, make necessary transportation arrangements. Arrange for transportation to and from the venue, if applicable, ensuring it aligns with the chosen dates and meeting schedule.



## **Communicate logistical details:**

Provide clear and concise information to participants regarding the meeting's location, date, time, transportation details (if applicable), and any other relevant instructions. Ensure everyone has the necessary information well in advance to avoid confusion or last-minute disruptions.





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## **Confirm dietary requirements:**

Inquire about any dietary restrictions due to allergies or medical/religious necessity among the attendees and communicate this information to the venue or catering service. Ensure that suitable meal options are available for all participants.



## **Evaluate and follow-up:**

After the off-site day meeting, evaluate its effectiveness by gathering feedback from participants. Assess whether the meeting achieved its goals and identify areas for improvement. Follow up with participants to share any action points, decisions, or next steps that emerged from the meeting.

**Do you need help or have questions?  
Let's connect and talk about your next event.**



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