

BoomPop

OFFSITES SIMPLIFIED

8 Steps for Planning Your Company Retreat

A resource for new organizers on creating fun,
productive, and successful corporate events.



Table of Contents

●	INTRODUCTION	
	Offsite basics	3
●	STEP 1	
	Create a competitive events strategy	6
●	STEP 2	
	Gather information	9
●	STEP 3	
	Set goals for your event	12
●	STEP 4	
	Assess your budget	14
●	STEP 5	
	Book locations, venues, and activities	17
●	STEP 6	
	Share the agenda and plan travel	21
●	STEP 7	
	Day-of organization	23
●	STEP 8	
	Follow-up	25
●	CONCLUSION	
	Start planning	27

Offsites are the new office

Thanks for checking out this resource! If you're like many of the people our team at BoomPop supports, you might be new to planning company offsites and retreats. This guide is designed with you in mind, because we know how difficult it can be to create fun, productive, and successful events when it's not your full-time position.

As COVID-19 restrictions have gradually lifted, people have naturally wanted to gather in person again. Many are seeing their leaders, teammates, and direct reports for the first time in years, if not meeting them for the very first time outside of a video call. Not only that, but companies now recognize more than ever how offsites and retreats can supercharge organizational culture by creating more genuine relationships and effective communication.

It's an exciting period, but also one that brings high expectations and pressure for event organizers. That's why we've created a collection of our learnings from planning world-class in-person events for teams and companies of all types that aren't just a great time, but meaningfully contribute to a company's overall culture.

Whether you're a manager, administrator, leader, or human resources professional, the step-by-step structure of this resource is made to give you a clear picture of an effective planning process—and if you're already an events pro, you'll also find useful industry insights and data. We hope you'll walk away equipped to tackle potential challenges and excited to level up the connections and culture of your organization.

Before we dive into the planning process, let's take a brief look at some of the benefits of hosting an offsite and common challenges in the planning process.



Benefits

Improving team culture and communication

Meeting your teammates in person can help you learn a lot about them—and not just that everyone is taller than you expected. How people communicate, from the tone of their voice to their body language, can easily get lost through a screen.

When you gather in person, you have the opportunity to uncover all kinds of small insights that help you understand the people you work alongside each day. Even if those insights don't have tangible results in the moment, they might make a huge difference in how your team interacts and collaborates in the long term.

Unlocking your team's creativity

Unwanted isolation can kill creativity, leaving your team without the inspiration they need to do innovative, fulfilling work. That doesn't just hurt them, it hurts the entire company and can stall progress.

Gathering in person gives you the chance to let people explore new ways of thinking. New environments, new challenges, and new interactions all set the stage for our brains to approach problem solving differently. When you unlock that creativity, people will feel more engaged in their work and the business will prosper as a result.

Developing skills, ideas, and strategies

When we come together in person to deepen our connections, we're also tapping into the incredible amount of knowledge our coworkers have. In the confines of a virtual meeting, it can sometimes be hard to allow conversations to flow organically. This limits the discoveries we can make and the kinds of spontaneous lessons we can teach one another.

An offsite is an opportunity to see how the people around you think, work, and deal with challenges in real time. That firsthand experience can not only improve your own work better, it can give the entire team insights that change the course of projects—and potentially even the course of an entire business.

Stepping away from work to relax and have fun

An offsite can be more than an opportunity to work together. The time you spend away from your daily tasks can actually be just as valuable, if not more.

Fun can come in the form of games or activities, but it can also come naturally. Giving your team time to explore the area, take walks together, have casual conversations, or choose activities of their own can create unexpected opportunities for connection. Point is: sometimes not working is where the real magic of an offsite takes place.

Challenges to anticipate

Planning offsite is complex. Expect to face roadblocks in the process—but don't get discouraged. Even if you don't have much planning experience, determination and finding the right resources can get you a long way. Let's look at a handful of the challenges organizers commonly encounter.

Research dead ends

One of the most time consuming parts of planning an offsite or retreat is finding hotels, coworking spaces, restaurants, activities, and anything else that needs to be booked in advance. This is largely because of just how many factors you'll be keeping in mind while searching.

Is it in the right part of town? Is it within budget? Is it available on the dates you need? Can they accommodate your group size? Does it align with your attendees' preferences? All of these questions and more will play a role in every single search you type and list of recommendations you read. In many cases, an option that seems perfect might not end up working out for one reason or another. These research dead ends are disheartening at times, especially when they begin to stack higher and higher, or as time to find something viable runs out.

Planning and timeline overwhelm

If you are an event organizer whose full time job is wholly unrelated to events, it's very likely that you might at some point become overwhelmed by the process and the amount of time, thought, and communication it can require.

This sense of overwhelm is generally at its worst when planning has to be rushed within a tight timeline, when budgets are highly restrictive, or when event support within an organization is very limited.

Communication

Just as offsites are complex for an organizer, they can also be somewhat hard to keep track of for attendees. These events often take place over multiple days and are composed of multiple components that can easily get mixed up. That means an organizer's inbox in the weeks leading up to an event (and during) can be filled with constant, repetitious messages about the details of your plan.

In subsequent parts of this guide, you'll find strategies and tips to help you overcome all of these common challenges and more.

01

Create an
events strategy

Create a competitive events strategy

In the past, offsites and retreats were largely viewed as strategic business events. Today, the term offsite is used to describe a much wider variety of team and company events, some of which aren't actually "off site" at all. Most often we find the term being used to describe any 3+ day event that requires most team members to travel to one location and includes coworking, team building activities, social events, and more.

Whether you call it an offsite, retreat, summit, kickoff, or anything else—these events are a critical way to build connections within organizations and foster a sense of belonging. 85 percent of leaders (seniors managers, executives, and board members) believe that in-person events are essential to their company's success. That's because in-person events can be an incredibly useful time to collaborate, meet key business objectives, and strengthen relationships with colleagues and clients.

Planning a single event is tough. Creating an entire strategy around events—from when, where, and how they take place—can be a full-time job. While you might not have the time or experience to build out a comprehensive strategy, it's important to think beyond the scope of a single offsite or retreat.

What is the cadence of these events? How do they align with other engagement strategies and goals? How can they reflect the unique identity and vision of your organization?

Doing your best to answer questions like these can help make sure every offsite is a purposeful part of your employee and client engagement strategies. To help you answer those questions, let's take a look at some data from 133 BoomPop customers on the role of offsites and retreats in their organization.

A look at the industry landscape

Let's take a look at some questions we asked customers in order to better understand their offsite planning practices. These responses can help inform how organizers and leaders tailor their events strategy to meet industry standards.

What is the goal of your next in-person offsite or retreat?

58% - Balance of work and fun

30.5% - Mostly to relax and have fun

9.8% - Mostly focused on work

Takeaway: The majority of organizations see offsites and retreats as a dual-purpose event. They want to discuss and strategize around key business topics, but they also want to give people the opportunity to simply have fun and build better relationships.

How far out from the scheduled in-person offsite or retreat date do you typically begin booking venues?

4.2% - 0-1 month

30.8% - 1-2 months

37.5% - 2-4 months

24.2% - 4+ months

Takeaway: These responses reflect a somewhat even spread between organizers booking events between 1 and 4+ months in advance, with a small majority at 2-4 months. While venues can likely be found and booked successfully in this amount of time, beginning earlier will allow for more access to ideal options.

How many company-wide in-person offsites or retreats does your organization plan to do each year?

8.3% - 0

27.5% - 1

29.2% - 2

8.3% - 3

7.5% - 4

3.3% - 5

15.8% - 6+

Takeaway: The frequency of offsites and retreats depends greatly on the size of a company. While a small startup may only host 1-2 company-wide retreats per year, other organizations may be hosting 1-2 for every team—meaning potentially dozens of events per year. As this data reflects, we find 2 events per year to be a common and often successful strategy.

What is the typical length for an in-person offsite or retreat?

45% - 3 Days

60% - 3+ Days

Takeaway: If attendees are going to travel from all over the country and the world, it's only logical to make the most of your time together. Although single day and overnight trips can be popular for local teams, an offsite or retreat usually requires—and benefits from—a bit more time.

How do you know if an offsite or retreat was successful?

78% - Attendee Surveys

Takeaway: The gold standard of offsite and retreat feedback is the attendee survey, but these events can also have a long term impact that might not be apparent right away. Seeing how eager participants are for the next event can be telling—especially determining what they want more or less of on the agenda.

Research dead ends

One of the most time consuming parts of planning an offsite or retreat is finding hotels, coworking spaces, restaurants, activities, and anything else that needs to be booked in advance. This is largely because of just how many factors you'll be keeping in mind while searching.

Is it in the right part of town? Is it within budget? Is it available on the dates you need? Can they accommodate your group size? Does it align with your attendees' preferences? All of these questions and more will play a role in every single search you type and list of recommendations you read. In many cases, an option that seems perfect might not end up working out for one reason or another. These research dead ends are disheartening at times, especially when they begin to stack higher and higher, or as time to find something viable runs out.



02

Gather Information

Identify company resources and policies

Even if it's your first time organizing an event, it's very likely that your organization has hosted some kind of offsite or retreat in the past. That means there may be some guidelines and best practices in place already. If not, you should work to identify who the key decision makers are in relation to your event and start building a repeatable process together.

Understanding specific policies related to travel, reimbursement, safety, and accessibility can help you avoid planning problems further down the line. It can also be helpful to seek out informal knowledge from other leaders or team members who've been involved in the event planning process at your organization before.

Collect information from your attendees

Before you book any rooms or make any reservations, it's best to collect information from attendees to help you plan more effectively. This can be done informally through team meetings and one-on-one conversations, but should ideally be collected into a formal survey.

The most critical information to prioritize is schedule/availability, dietary requirements, and willingness to attend if the event is not mandatory. Beginning this process will also encourage attendees to provide other information that may be relevant to the organizer.

Aside from those essential pieces of information, you can also begin to ask attendees questions about other preferences. This could include potential cities for an event to take place, ideas for activities, favorite cuisines, and any other topics that might help guide your planning.

Here are some sample questions to help you get started:

- Would you prefer a remote, scenic location, or one with plenty of activities, restaurants, etc?
- What kind of activities do you think would help our team get to know each other?
- Is there anything you feel strongly we should accomplish at this event?
- Which sounds better: an outdoor activity like a hike, or an indoor activity like an escape room?
- What elements (certain location, activities, goals) would make you most excited to attend this event?

Create a health and safety plan

When planning any group event, especially one that includes domestic and potentially international travel, it's crucial to know how you're going to keep attendees safe and healthy. Especially since the COVID-19 pandemic, travelers are likely to be more aware and proactive when it comes to their own personal health and safety, so plan ahead so you are able to answer guest questions or provide proactive guidance when needed.

Identify and follow official health guidelines

The most important part of your COVID-19 safety plan is to identify and adhere to the latest guidance from relevant health authorities in the area your event is taking place. That spans all the way from national authorities like the Centers for Disease Control and Prevention down to state, county, and city level guidelines.

While most parts of the U.S. have now lifted restrictions related to social distancing, masking, and gathering sizes, it's important to gather and share up-to-date information with your attendees and keep up with any potential changes. Many public health authorities offer text and email notification services that can help you keep up with any changes.

Collect attendee sentiment

When it comes to COVID-19 safety, everyone has different levels of comfort and caution based on their unique circumstances. Those who are immunocompromised or live with someone whose health is vulnerable may have a different set of standards than the general population, so collecting and recognizing differences in sentiment around safety should be a key part of your planning process. Sharing a pre-event survey and discussing responses with attendees can be an excellent way to align on expectations and comfort levels.

Be prepared

- Make your safety plans and expectations clear
- Consider whether testing, masking, symptom check-ins, or other precautions are right for your event
- Create a communication plan in the event someone tests positive
- Have a care and support plan for attendees who may get sick
- Prepare your team and organization for potential work disruptions

03

Set goals for
your event

Why every offsite needs goals

It's important for leaders to pin down why they're hosting a team offsite. Is the ideal outcome of your event to provide space for innovation and decision-making, provide an opportunity to have fun, or something else?

In the early stages of planning, these objectives should be identified and discussed with the team to make sure everyone's on the same page. This way you'll have a clear path for building your agenda.

For example, working on projects or making major decisions might mean you need more dedicated work hours and space to accommodate discussion, whereas a more social event would mean more unstructured time and group activities. Sorting out your goals beforehand will make your planning choices easier every step of the way.

While you might feel pressure to orient your event around business objectives, don't forget the simple power of building relationships. People who report being lonely are twice as likely to miss work due to illness and five times more likely to miss work due to stress, which means even just building better relationships throughout your organization can have tangible, long term benefits.

Creating your agenda

Once you've set clear goals with your team, you can start building an agenda. That can include coworking time, team activities, social events, workshops, and more—all depending on what the ultimate vision for your event is.

That said, it's important not to get tunnel vision when it comes to how you fill your agenda. Though you might have a very specific goal, creating some level of variation is essential to keeping things engaging and dynamic. A successful company offsite should have at least some combination of business and fun, even if more heavily weighted one way or the other.

Organizers should also avoid the instinct to overstuff an event with back-to-back activities or working sessions. Remember that these events can be tiring for your team, so plan in shorter blocks of time, allow for breaks between major activities, and offer choices for more or less participation when you can. Offsites should leave your staff feeling recharged, not exhausted.

Questions to help identify your goals

- What is the most important thing we're hoping to achieve during this time together?
- Is it more important for us to get to know each other better or to make progress on our work?
- Is there anything our team or organization is struggling with that we might be able to tackle during this event?
- How do you want attendees to feel after the offsite?

04

Assess your
budget

How to set a budget—or make the most of the one you’ve got

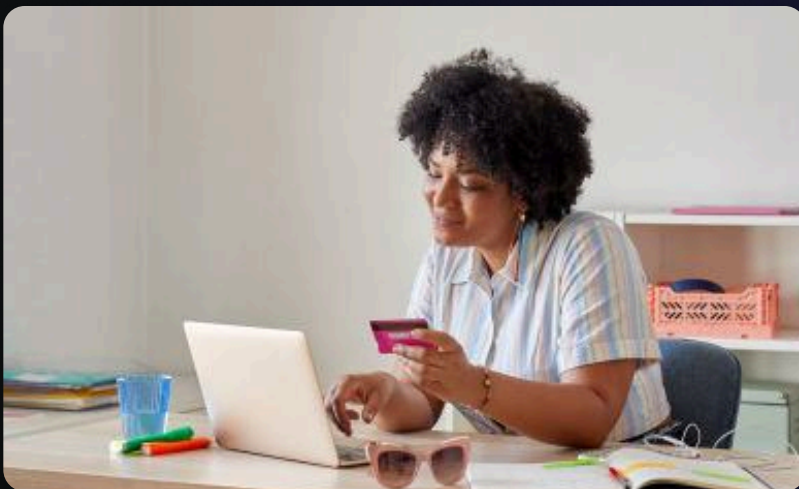
Offsites and retreats can come with a significant price tag, but it’s an investment in connection that always pays off. Deciding just how big that investment should be is a complex question—and how budgets are set varies widely across different organizations.

In many cases, organizers are given a per person or total budget and left to allocate it themselves. This can be overwhelming at first, but that’s why we’ve intentionally placed budgeting after goal setting in our recommended steps. If you can refer back to the goals of your event and precisely what you want to accomplish, it becomes much simpler to decide how items on your budget will be prioritized.

When making decisions about allocation, there are four core areas you’ll need to consider: accommodations, dining, activities, and travel. Travel tends to be the most inflexible of these four, so it’s best to quickly create an estimate based on where your attendees are traveling from, then set that money aside.

With the remainder of your budget, you’ll have to strike a balance between the remaining three areas of accommodation, dining, and activities. In some cases, coworking space will be another added consideration. Accommodation generally requires the highest portion of all these areas, with activities second, and dining third. That depends greatly, however, on the goals of your event and the interests of your attendees.

To help give you an idea of how a total budget can take shape, let’s look at some estimated budgets we’ve based on actual events (not including travel expenses):



California Getaway

📍 Mendocino County, California

📅 4 Nights

👥 80 person corporate offsite

💰 \$1,000 per person / \$80,000 total

NYC Adventure

📍 New York City, New York

📅 3 Nights

👥 20 person team retreat

💰 \$1,925 per person / \$38,500 total

Miami Retreat

📍 Miami, Florida

📅 3 Nights

👥 20 person corporate offsite

💰 \$1,325 per person / \$26,500 total

Los Angeles Offsite

📍 Santa Monica, California

📅 2 Nights

👥 10 person corporate offsite

💰 \$1,000 per person / \$10,000 total

For further insight, here are the responses from our previously mentioned survey of offsite organizers on the budget size of their most recent event.

What was the total budget of the most recent in-person offsite or retreat you planned or helped plan?

- \$10,000 (44.2%)
- \$10,000-\$30,000 (24.2%)
- \$30,000-\$50,000 (12.5%)
- \$50,000-\$100,000 (7.5%)
- \$100,000-\$200,000 (5%)
- \$200,000 or more (6.7%)

When it comes to budgeting, the most important thing to keep in mind is that aside from basic essentials like travel, the bulk of your spend should be oriented towards catering to what will make the experience best for your unique group of attendees.

05

Book locations,
venues, and
activities

Deciding where to stay, work, eat, and have fun

Choosing where your team stays, gets work done, and eats meals during your offsite is incredibly important to making it a positive experience. Organizers often feel a lot of pressure around these decisions, and rightfully so. Let's take a look at how to approach these decisions.

How to choose where your offsite takes place

Most companies opt for one of two options: 1. taking your team on a retreat to a new city where none (or few) of your team members are based, or 2. bringing everyone to a city where your company already has an office, or where a significant number of employees already live.

Both of these choices have benefits. Hosting your event where most of your employees already live can boost attendance and cut costs, but it can also make the event feel a little less special for those who aren't traveling to the destination—and employees based in that city might run the risk of being more distracted by day-to-day responsibilities.

Taking everyone to a new, unfamiliar city where the experience of the event can be shared—everyone staying in the same hotel, doing activities together, not having normal family and social obligations—often makes the biggest impact in terms of team bonding. But going this route opens up more logistical challenges to tackle, like finding a hotel that can accommodate your group, booking office space and activities, choosing restaurants, and more.

Consider where attendees are based

It's important to take into account where your team members are based and whether travel will be easy, affordable, and leave them with enough time to enjoy a retreat. In some cases, picking a location that's convenient might be better than choosing somewhere that would require long days of travel to get to. If your team is largely based in the U.S., you might want to choose a major city most of your team could take a direct flight to. If you're thinking about bringing together a global team, choosing a location that would be as central to everyone as possible is usually a safe choice. However, all of that often goes out of the window if the destination is one that your team is truly excited to be visiting.

Climate

While it might seem obvious, weather is important enough to a team event that it's worth mentioning here. A hot, tropical climate can sound picturesque, but it might actually make all of those outdoor activities you planned feel like a major chore. Many locales also have more unpredictable weather than others, and it's important to research what you can expect at certain times of the year. Like any aspect of your offsite, it's important to hear from your attendees—would they rather hit the beach or warm up by a fire in the mountains? The environment you find yourself in will radically alter your experience.

Hotels, coworking space, and restaurants

Most organizers end up booking a single hotel or retreat center for their team. This can be by far the most difficult and important element of your offsite, and it's often greatly impacted by how far in advance you're planning. Booking a year in advance can help guarantee you that perfect spot, but only having a few months to lock something down might mean you have to make concessions.

Amenities, work spaces, and proximity to activities and attractions are all major considerations—but finding somewhere with the right atmosphere and style can often be just as important. Especially in major cities, there are generally a wide variety of trendy, traditional, or boutique options. Which you opt for simply depends on the tone you want to set and the personality of your group.

In some cases, organizers will choose to have attendees book an accommodation of their own choosing and then be reimbursed. Though there are situations where this might make sense, it's generally best to keep a group together in one location. Staying together makes local travel safer, easier, and often cheaper, while helping to create more opportunities for connection among attendees.

Decide whether you need a workspace

Not every offsite or retreat has a work component, but if yours does, it's important to think about what kind of workspace your team practically needs. If you have a local office, that can obviously save you some cash—but in a new city, identifying spaces that would work best for your team is crucial. Many hotels and retreat centers can offer onsite work spaces, or you can venture out to other venues that might be more attuned to your preferences.

Reserve dining options

Food is one of the most important parts of bringing people together. It's a shared social experience that helps your attendees relax, enjoy themselves, and maybe even try something new. It's good to keep dining in mind when making your other planning decisions, like what part of a city your hotel will be in and whether there are good options close by.

The biggest challenge when it comes to dining is often finding something that can accommodate larger groups or ones with a significant amount of dietary restrictions. Calling and discussing your options with a long list of restaurants can be a time consuming chore, and it may be helpful to include questions about cuisine preference in your pre-event surveys to help narrow your search.

Explore Activities

When considering which activities to book, the information and preferences you've gathered from attendees will become incredibly useful. Do they want to spend time in nature? Explore museums? Have a day at a theme park? Ideally you'll already have answers to these questions so you can move forward with confidence.

In some cases, the hotel or retreat center you choose will already have activity packages you can select from. In other cases, you may have to find and book them independently. This research can be one of the more time-intensive parts of planning, which means you should begin as early as possible and identify a wide range of options in case something falls through in the planning process.

Keep Inclusion in mind

As we discussed earlier, tailoring your event to your team's wants and needs is as simple as asking. Of course, there can be a huge variety of preferences within one group, but spotting trends and acting accordingly can help make your event as inclusive as possible.

For example, if you know there are a number of non-drinkers, it's probably best not to host a wine tasting. Instead, you can choose a variety of other activities like workshops, games, or even swap in a coffee tasting. By collecting feedback and adjusting to what you find, you can accommodate any array of employee preferences.

Everyone at your event should feel safe, comfortable, and know that their concerns will be heard. Even something as simple as getting a sense of whether your team would rather chill out at a nice restaurant or head to a scenic trail will not only help ensure a more fun experience, but will show you really care about curating an event that's inclusive and accessible to your attendees.

06

Share your
agenda and
plan travel

Share agenda with attendees

Once your venue is booked, reservations are made, and all the little details are hammered out, you can begin sharing your formal agenda with attendees. This is a great time to get everyone hyped up for what's to come, especially if you're revealing an exciting location or activities.

What's most important at this stage is to be consistent and clear in your communication. Triple check that dates and times are correct, create any supporting instructions attendees may need, and ensure that everyone knows where and how to ask questions about the event.

The more you can anticipate questions and challenges, the smoother things will be. But communication around detail-heavy events like these is not easy, so don't be surprised if something slips through the cracks or miscommunications happen. Just be clear, consistent, and keep important info top of mind for attendees.

Create travel plans

Once everyone knows when and where they're going, it's time to handle travel. Based on the information you've gathered about attendees, you should already have a clear picture of where everyone will be coming from and how expensive travel will likely be. What can be more complicated is the actual booking of flights and local travel, because every organization does things a little differently.

There are many travel booking tools available with varying features, levels of customization, and potential limitations. How you proceed will depend on any practices already in place and what works best for your unique circumstances. In some cases, an organization will book every attendees' travel plans for them, while others will have attendees book independently and be reimbursed. Any process you choose will have pros and cons, but what's most important is making sure attendees understand what's expected of them and everything is completed in time to make sure everyone arrives when they're supposed to.

07

Set goals for
your event

Manage your agenda

The time has finally come: everyone has arrived, your agenda is squared away, and now you can switch gears from planning your event to managing it—and hopefully enjoying it yourself, too.

Day-of organization and management requires a somewhat different skillset from the prior planning phases. Keeping people on track, communicating with vendors, and acting as a leader of the experience can present new challenges. As long as you're prepared and have all your details accounted for, things should move smoothly.

Maintaining communication

Even though you may think everyone has heard the plan so many times they couldn't possibly forget it, there will always inevitably be slip-ups.

Overcommunication is an event organizer's best friend, and you shouldn't be afraid to pop in to Slack or email inboxes with reminders, updates, directions, and more. The less chance of someone mixing up a time or going to the wrong venue, the better.

Here are some ideas for keeping communication active during the event:

- Dedicated Slack channel or group message for attendees
- Daily email update
- Printed itinerary or board on display
- Regularly updated event website

08

Follow-up

The offsite ended on a positive note and your team feels accomplished. There were a lot of great discussions, people got to know each other better, and strategies were developed. But what comes next? It's important to maintain momentum and remember that every event is an opportunity to learn, evolve your strategy, and improve future experiences.

Collecting feedback

Gathering attendee feedback is the most crucial part of event follow-up. Thankfully, it's also incredibly simple. Many organizations find it useful to develop a consistent rating system across events to compare sentiment, but going beyond a number can reveal much more. Asking specific, open-ended questions on how attendees felt about various aspects of the event can help paint a clear picture of where improvement is needed. We recommend making this kind of survey anonymous to encourage honesty.

Here are some starter questions to consider asking:

- What about this event (location, activities, etc) should be changed or improved in the future?
- How did you feel about the hotel? Any specific thoughts on its location, amenities, comfort level, or style?
- How did you feel about the agenda? Did time feel balanced and well spent?
- Was there anything about this event you would like more or less of next time?
- Do you feel you were able to genuinely connect with other attendees?

Conclusion: Time to start planning

We hope this guide has helped you understand the core elements of planning an offsite or retreat. Organizing a successful event is complex and difficult, but with the right resources, you can create something truly memorable.

If you feel overwhelmed by the planning process, our experts are here to help. With a network of planners in major cities across the United States, we can handle everything from start to finish. We offer curated recommendations on everything from where to stay and what to do, plus day-of, on-site organizing for events that require extra care.

Reach out to our team today to receive a customized proposal and get one step closer to hosting your perfect offsite.



Thanks for reading

Want help planning your next Offsite?
Email us at events@boompop.com