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// CORPORATE OFFSITE WORKSHEET

# THE CORPORATE OFFSITE PLANNING WORKSHEET

The 5-question framework + 30-day timeline for HR leaders and EAs  
planning offsites that actually compound for a year.

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TACTICAL TEAM BUILDING FOR SERIOUS LEADERS

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The 5-question framework + 30-day timeline for HR leaders and EAs planning offsites that actually compound for a year.

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By Ron, Tactical Fitness Austin Founder

## How to use this

Print this worksheet. Fill it out before you book anything. Bring it to your kickoff meeting with the CRO, CHRO, or whoever sponsors the offsite.

If you can answer questions 1-5 with one sentence each, the rest of the planning will be 3x easier and the offsite will be 3x more likely to actually deliver on the goal.

## Section 1: The 5-Question Framework

Answer all five before picking a venue or activity. Skip this, and you'll plan a vibe instead of an outcome.

### Question 1: What's the OUTCOME we want?

Pick ONE primary outcome. Sub-outcomes are fine, but lead with one.

Outcome	Triggers
Reset team trust	Tough year, layoffs, failed quarter, new leadership
Onboard new leadership	New VP / Director / C-suite joined
Sales kickoff	Annual kickoff, new comp plan, new pitch
Executive strategy reset	Annual planning, M&A, restructure
Recognition / reward	Hit a major number, retention play
Cross-functional integration	Reorg, two teams need to work better together
Pure celebration	No business goal – reward only (this is fine, just don't pretend it's strategy)

Our primary outcome:

## Question 2: How will we know it worked?

This is the question most offsites skip. If you can't answer it, you're planning a vibe.

Metric	Target
Two-week qualitative survey response (specific behavior change)	Track % of team naming specific change
Three-month behavior change (the friction the offsite was supposed to address)	Friction decreases measurably in ___ months
Six-month talent retention (the people we were trying to re-engage)	___% retention of target cohort
NPS-style score on the offsite itself	/ 10 average
Pipeline / revenue change (for sales kickoffs)	\$ pipeline lift in following quarter

Our success metric:

## Question 3: Who's the audience?

Audience	Size	Notes
Full team		
Just leaders		
Specific function (Sales, Eng, etc.)		
Top performers only		
Mixed (multiple functions / levels)		

Total headcount: Levels included: Functions:

## Question 4: What's the format?

Format	Best for
Half-day (4 hours)	Recognition events, low-cost team alignment
Full day (8 hours)	Sales kickoffs, training-heavy programs
2-day single-night	Most corporate offsites – the standard format

3-day, 2-night

Sales kickoffs with content + experience + strategy

4+ days

Executive offsites, ELT-level only

Our format:

**Question 5: What's the budget?**

Get a number. "TBD" doesn't help anyone.

Tier	\$/person all-in (offsite experience only)	Hotel/flights added
Lean	\$250-500	+ \$400-600/person for hotel + ground
Standard	\$500-1,200	+ \$500-800/person
Premium	\$1,500-3,000	+ \$700-1,200/person
Executive	\$3,000+	+ \$1,000+/person

Our budget: \$ per person all-in Headcount: Total: \$

**Section 2: Anchor Experience Selection**

Every memorable offsite has ONE anchor – the thing the team talks about months later.

**Does our anchor need these properties? (Check all)**

- Active (team does something – doesn't watch)
- Shared (everyone participates, no spectator class)
- Memorable months later (surfaces something a meeting room wouldn't)
- Can't be replicated near the office
- Inclusive across fitness/mobility levels of the group
- Doesn't require deep skills we don't have
- Photographable (for internal comms post-event)

**Austin anchor options**

Option	Best for	Capacity	Per-person	Inclusivity
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Tactical / firearms experience	Trust-reset, cross-functional integration, sales kickoff energy	5-150+	\$300-3,000	High (all skill levels welcome)
Private ranch day (sporting clays, ATV)	Mid-size groups, slower pace	30-120	\$400-900	High
Boat day on Lake Austin / Travis	Warm-weather, relaxed teams	20-80	\$300-700	Medium (water comfort needed)
Music venue buyout + participatory session	Music-culture companies	50-200	\$400-1,200	High
BBQ tour + private chef component	Food-culture, smaller groups	30-60	\$200-500	Medium (dietary planning)
Helicopter scenic / shooting	Premium executive groups	4-12 per heli	\$1,500+	Medium (motion sickness)
Brewery / distillery tour	Loose connector groups (no business goal)	20-50	\$150-300	High
Golf	Network-heavy executive groups	4-40	\$300-600	Low (skill barrier)

Our anchor: *Why this one:*

## Section 3: The Agenda Template

Use this skeleton, adjust to your format.

### Day 0 (arrival)

- pm: Arrivals welcome bar
- pm: Optional casual dinner (no mandatory content)

### Day 1 – anchor + strategy

- 8:00 am: Breakfast, soft start

- 9:00 am: **Anchor experience** (3-5 hours)
- 12:30 pm: Catered lunch on-site
- 2:00 pm: **Strategy session** (90 min — post-anchor energy is high)
- 4:00 pm: Free time
- 7:00 pm: Group dinner

### *Day 2 (if 2+ days) — content + skills*

- 8:30 am: Breakfast + State of [Business / Sales / Function]
- 10:00 am: Skills / methodology / product session
- 11:30 am: Working sessions (small breakouts)
- 12:30 pm: Lunch
- 2:00 pm: Panel — top performers / leadership Q&A
- 5:00 pm: Optional manager working dinners



THE OFFSITE YOUR TEAM WILL  
REFERENCE FOR A YEAR

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### Day 3 (departure)

- 8:30 am: Breakfast
  - 9:30 am: Commitment session (each team commits to one Q1 number)
  - 10:00 am: Closing remarks (15 min max)
  - 10:30 am: Hotel checkout
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## Section 4: The 90-Day Planning Timeline

### 90 days out

- Outcome + success metric confirmed with sponsor (CRO / CHRO / CEO)
- Budget approved
- Date and city locked
- Headcount estimate (within  $\pm 10\%$ )

### 60 days out

- Anchor experience vendor booked, deposit paid
- Hotel block reserved (20-30% buffer over expected headcount)
- Venue secured for working sessions (if separate from anchor)
- Save-the-date sent to attendees

### 45 days out

- Catering vendor(s) booked for all on-site meals
- Ground transportation arranged (charter or Uber XL plan)
- Dietary restriction survey sent to attendees
- Photographer / videographer booked

### 30 days out

- Final headcount commit deadline for attendees
- Working session content drafted (CRO state of business, etc.)
- AV / projector / screens confirmed at venue
- Quiet room for C-suite to take calls confirmed (often forgotten)

### *14 days out*

- Final headcount to all vendors
- Dietary needs forwarded to caterers
- Pre-arrival email sent: agenda, what to bring, weather forecast
- Materials printed / shipped to venue

### *7 days out*

- Speaker rehearsals done
- Final agenda distributed
- Day-of contact sheet to all vendors
- Backup weather plan confirmed with outdoor vendor

### *Day of*

- EA / planner on-site 90 min before first guest
- Sponsor briefed on any last-minute changes
- Confirm photographer arrival + brief on must-capture moments

### *Day +14 (post-event)*

- Send the qualitative survey ("What's one thing you'll do differently?")
  - Share photo / video deliverables internally
  - Schedule the 90-day follow-up review with sponsor
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## *Section 5: The Things Most Planners Wish They'd Asked*

These are the questions experienced corporate planners ask vendors that newer planners don't. Copy them.

### *To the anchor experience vendor*

- 1 "What's your weather cancellation policy specifically? What triggers cancellation, what triggers reschedule, what triggers refund?"
- 2 "How much advance notice do you need for headcount changes? What's your headcount lock date?"
- 3 "Can you accommodate dietary needs at on-site meals? What's your lead time?"

- 4 "Do you provide ground transportation? If yes, what's the surcharge? If no, what's your recommendation?"
- 5 "How do you handle attendees who opt out of the experience itself but want to be on-site?"
- 6 "Can we get a senior decision-maker contact, not just a sales rep?"
- 7 "What's the photography / video policy? Can we hire our own? Can we use yours?"
- 8 "Do you offer post-event materials we can share internally (group photo, brief recap)?"
- 9 "What's your liability / insurance coverage for our company?"
- 10 "What happens if our point-of-contact at your company leaves before the event?"

### *To the hotel*

- 1 "Group block rate vs. negotiated discount – which is better for our headcount?"
- 2 "What's the cancellation policy for the room block?"
- 3 "Can we get a meeting room for the working sessions, included in the block?"
- 4 "What's the bar / food and beverage minimum we'll be expected to hit?"
- 5 "Is there a quiet area for C-suite to take calls between sessions?"

### *To the caterer*

- 1 "What's your lead time for finalizing the menu?"
- 2 "Can you accommodate gluten-free, vegan, kosher, halal, severe allergies?"
- 3 "What's the cost structure: per-person vs. by-the-tray?"
- 4 "Will service staff be on-site for the full event or just delivery?"

### *To the photographer*

- 1 "What's the deliverable timeline post-event?"
- 2 "Can we provide a shot list in advance?"
- 3 "Do you offer video repurposing for internal comms?"

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## **Section 6: Post-Event Measurement**

The thing most offsites skip – and the thing that determines whether you get budget approval for the NEXT one.

*2-week qualitative survey (3 questions only)*

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- 1 What's one specific thing you'll do differently because of the offsite?  
(Open-ended, 1-3 sentences)
- 1 How likely are you to recommend a similar event for another team at our company?  
(1-10)
- 1 What would have made the offsite even better?  
(Open-ended) ` ` `

### 90-day behavior check

Pick the friction the offsite was supposed to address. Measure it:

- For cross-functional integration: Is the cross-team conflict pattern reduced?
- For trust reset: Is psychological safety up in team surveys?
- For sales kickoff: Is pipeline / activity up vs. same period last year?
- For executive offsite: Are strategic decisions moving faster?

If you can't answer any of these, the offsite was a vibe. That's not bad — vibes have a place. Just don't pretend it was strategy.

## Need help executing this?

If you're planning a corporate offsite in Austin and want our tactical experience as the anchor candidate, or want a sanity check on the agenda you've drafted:

- **Email:** [info@tacticalfitnessaustin.com](mailto:info@tacticalfitnessaustin.com)
- **Text / Phone:** (512) 815-9101

I personally read every corporate inquiry. Tell me your outcome (Question 1 above), headcount, and target date range. We'll either be the right fit or recommend an Austin operator who is.

— Ron, Tactical Fitness Austin Founder

Free worksheet for HR leaders, EAs, and corporate planners. Share it with anyone planning an offsite in the next 12 months.

Tactical Fitness Austin — Austin's private outdoor tactical experience operator for corporate clients including Samsung, YPO chapters, and Jackson Walker.

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