

Strategy and planning awayday / workshop

The organiser's checklist

The practical detail that decides whether the day works

The sponsor owns the purpose. You own everything that can stop the purpose happening. Days rarely fail on the agenda. They fail on a cold room, a projector with the wrong cable, a ninety-minute lunch, or a phone signal good enough for people to carry on working.

Work backwards from the date. Everything below is either a decision to take or a question to ask someone else.

Countdown

When	What
8 to 12 weeks	Date agreed and in diaries. Attendee list confirmed. Venue held. Facilitator booked.
4 to 6 weeks	Room and layout confirmed. Catering ordered. Invitations out with joining details. Pre-work issued.
2 weeks	Numbers confirmed. Dietary and access needs collected. Kit list agreed with the facilitator.
1 week	Final numbers to the venue. Running order circulated. Cover arranged. Pre-work chased.
Day before	Materials printed and packed. Venue contact confirmed. Kit tested.
On the day	Arrive an hour early. Test everything. Walk the room.
Within 48 hours	Outputs circulated. Review meeting in diaries. Feedback collected.

1. Date and diaries

- ☐ Book eight to twelve weeks out. Senior diaries do not clear at short notice.
- ☐ Avoid month end, quarter end, board week and the days around a results announcement.
- ☐ Check school holidays, religious observance and any known family commitments before you send anything.
- ☐ Ask the facilitator to hold two dates while you clear diaries, then release one promptly.

2. Venue

- ☐ Genuinely off site. The meeting room upstairs is not an awayday.
- ☐ Under an hour's travel for most people, or make it residential.
- ☐ Daylight. A room with windows does more for the afternoon than anything on the agenda.
- ☐ Exclusive use of the room for the whole day, including set-up and clear-down time.
- ☐ Ask what else is happening in the building. A wedding, a building site or a bar next door will cost you.
- ☐ Confirm heating and air conditioning, and who controls them. Ask for a named contact on the day.

3. Room and layout

- ☐ Ask the facilitator what layout they want before you book. Cabaret, horseshoe and boardroom are not interchangeable.
- ☐ Confirm in writing that furniture can be moved. Venues say yes on the phone and no on the morning.
- ☐ Check wall space and whether blu-tack or magnets are allowed. Some venues ban both, which kills flipchart work.
- ☐ Book breakout space for small groups. The corridor and the bar do not count.

4. Kit

- ☐ Screen or large display, and the exact connection confirmed: HDMI, USB-C, and an adapter you have tested yourself.
- ☐ Ask whether the facilitator brings a laptop and clicker, or needs one provided.
- ☐ Two flipchart stands minimum, fresh pads, and your own markers. Venue markers are usually dry.
- ☐ Sticky notes, pens, blu-tack, spare paper, and a clock the whole room can see.

- ☐ Wifi password confirmed in advance and printed on a card, not spelled out at nine o'clock.
- ☐ If anyone joins remotely, test the audio in the actual room, not from your desk.

5. Food and drink

- ☐ Ask about dietary requirements in the invitation, not the week before.
- ☐ Order a light lunch. A heavy one costs you the afternoon.
- ☐ Water on tables all day. Coffee available continuously, not only at set breaks.
- ☐ Serve lunch in the room or immediately next to it. A walk to a restaurant costs an hour and breaks the thread.
- ☐ Agree exact break times with the facilitator and tell the venue. Kitchens work to their timings unless you tell them otherwise.

6. Travel, access and accommodation

- ☐ Ask everyone about access requirements privately when you invite them.
- ☐ Confirm parking: how many spaces, what it costs, whether it needs booking.
- ☐ Circulate the postcode that actually works for satnav, plus rail and taxi options.
- ☐ Set an arrival time fifteen minutes before the start and say the day begins promptly.
- ☐ Residential: single rooms, check-in and check-out times, who pays, and what is included on the bill.

7. Pre-work and materials

- ☐ Issue pre-work at least two weeks out with a deadline and an honest estimate of how long it takes.
- ☐ Chase non-responders once, then tell the sponsor. Do not chase three times.
- ☐ Print against final numbers plus two. Check quantities, orientation and colour before you leave the office.

8. Protecting the day

- ☐ Agree the interruption rule with the sponsor and state it in the invitation: phones away, or one window for messages.
- ☐ Arrange cover so people can genuinely switch off, and publish who is covering what.
- ☐ Brief reception and the venue on who may contact the group and how.
- ☐ Agree in advance what counts as a real emergency, so nobody has to decide on the spot.

9. Capturing the day

- ☐ Agree who takes the notes, and make sure it is not the facilitator.
- ☐ Photograph every flipchart before it comes off the wall.
- ☐ Agree the format of the written output and who produces it, before the day rather than after.
- ☐ Set the circulation deadline at two working days. A week and it has already gone cold.

10. After the day

- ☐ Circulate outputs, decisions and owners within forty-eight hours.
- ☐ Get the review meeting into diaries before people leave the room.
- ☐ Collect feedback within twenty-four hours. One question is enough: what would you change about the day?
- ☐ Keep your notes on the venue, the caterer and the room. Next year's organiser will thank you, even if it is you.

Contingency

- ☐ A named venue contact with a mobile number that works on the day.
- ☐ A plan for the display failing: flipcharts, printed slides, or the facilitator working without them.
- ☐ A plan for the facilitator being delayed, and someone briefed to open the day.

What next

There is a companion checklist for the person sponsoring the day: purpose, outcomes, scope, their own role, and follow-through. Send it to them, ideally before they brief you.

Questions about setting up a day for your leadership team: bob@bobonbusiness.co.uk or bobbradley.co.uk/meet.