



TROOP

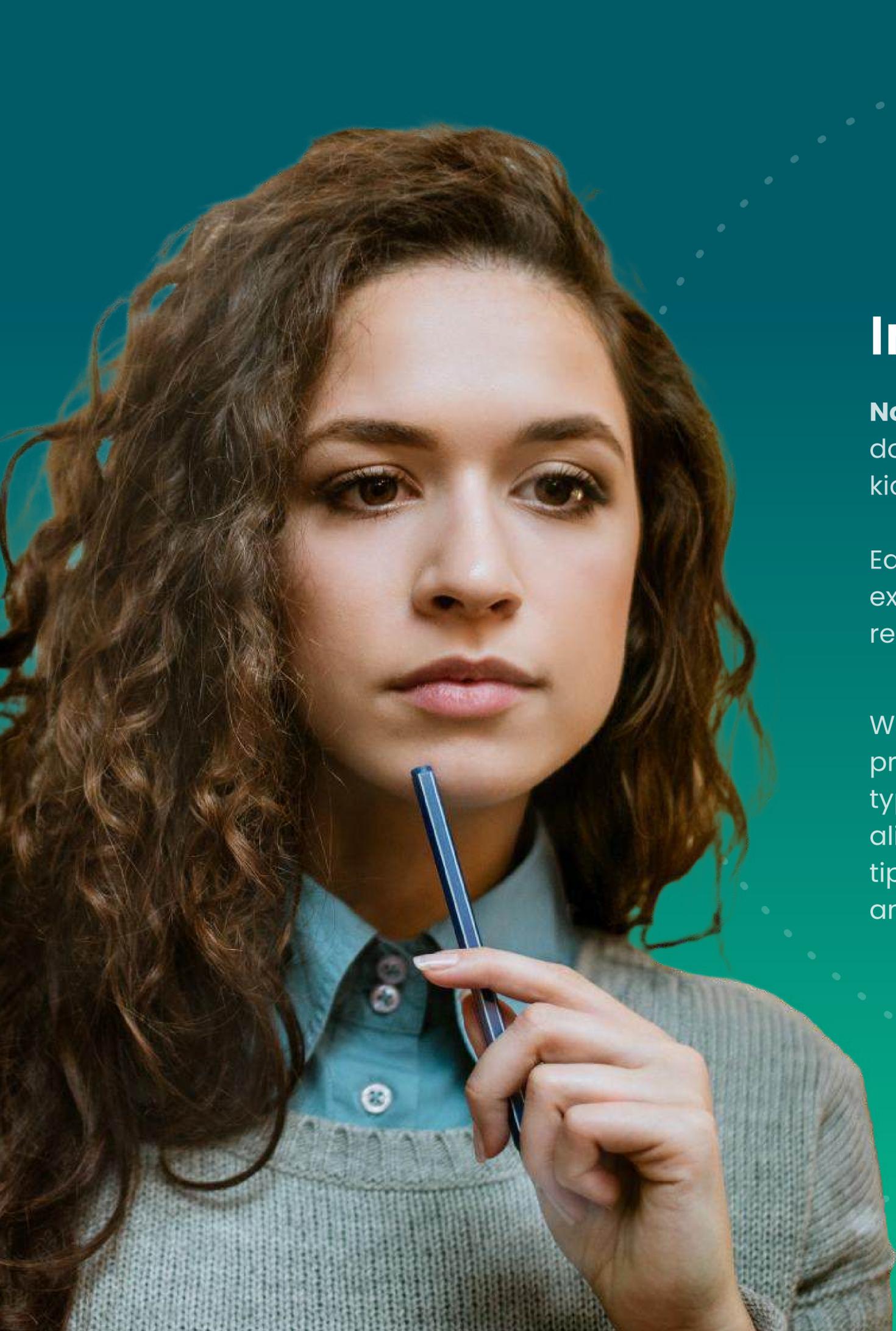
PLAN LIKE A PRO:

Expert Planning Tips by Meeting Type

Not all in-person meetings are created equal — and neither are their budgets, timelines, or expectations. Knowing why an in-person meeting is happening and who it's for determines how you plan it.

Use this worksheet to define the purpose, align with meeting stakeholders, and apply the right planning approach.





Introduction

No two meetings are alike. A board meeting doesn't run like a team retreat, and a project kickoff feels nothing like a new hire training.

Each has its own goals, audience, and expectations — and that's why each meeting type requires a unique approach.

Whether you are a novice meeting planner or a pro, this worksheet helps you match each meeting type to the right planning approach. From a quick alignment session to a multi-day offsite, you'll find tips and pro insights to help you plan efficiently and with purpose.

Identify the meeting type

Before diving into the details, get clear on what kind of meeting you're planning. Use this criteria to set the right direction from the start:

1

What's the primary objective?

- Align leadership on objectives and goals
- Strengthen team connection and company culture
- Deepen customer or partner relationships
- Share knowledge or onboard/train staff
- Launch a project or initiative

2

Who's attending?

- Executives and leadership
- Cross-functional teams
- External partners or clients
- Department or team

3

What's the desired outcome?

- Decisions made
- Relationships strengthened
- Skills or knowledge gained
- Plans or projects launched

Once you identify your answers, move to the next section to see which meeting type aligns best.



Meeting type

Use this quick-reference table to better match your meeting's objectives, attendees, and intended outcomes to the appropriate meeting type. It helps you validate what you're planning before you begin.

MEETING TYPE	PRIMARY OBJECTIVE	KEY ATTENDEES	PLANNING PRIORITIES
Executive Planning Offsite	Align leadership on company priorities and next steps	Executives, senior leaders	Secure a convenient venue, ensure tech readiness, build in discussion time, and coordinate with other EAs or stakeholders
Department or Team Offsite	Build alignment, strengthen culture, and collaborate	Department or working teams	Maintain budget visibility, manage logistics, and create a balanced agenda
Customer or Partner Meeting	Deepen relationships, share updates, and close deals	Executives, sales or customer success leads, client or partner	Manage high-touch details, track ROI metrics or follow-ups, and personalize hospitality
Training or Workshop	Upskill teams and reinforce shared knowledge	Employees, trainers or facilitators	Set up technology and room layout, and confirm attendee coordination
Project Kickoff	Define goals, roles, and expectations	Cross-functional teams	Confirm timeline visibility, align on scope, finalize agenda and pre-reads

Executive Planning Offsite

Purpose: Create space for senior leaders to align on priorities, make strategic decisions, and step back from day-to-day operations. These meetings require focus, confidentiality, and a well-structured agenda that supports high-level planning.

Planning checklist:

- Secure a venue that offers private, sound-proof spaces for confidential discussions.
- Confirm dedicated breakout areas for strategic sessions.
- Align decision-making authority per session with your executive's expectations.
- Book restaurant reservations in advance that support thoughtful conversation and privacy.
- Coordinate ground transportation for executives, including VIP options if needed.

PRO TIPS:

- Send pre-reads early so session time can focus on decisions — not updates.
- Review budget expectations early and account for elevated costs related to dining, accommodations, and transportation.
- Outline non-negotiables with the venue (AV needs, dietary requirements, and confidentiality).
- Reserve hotel rooms for executives and VIPs in quieter areas to reduce distractions and ensure a more comfortable experience.
- Allow for travel flexibility as executives often adjust schedules last minute.



Department or Team Offsite

Purpose: Strengthen team relationships, build trust, and spark collaborative thinking. These offsites create space for connection and morale building while aligning the team on shared goals and ways of working.

Planning checklist:

- Choose a venue that supports collaboration: movable furniture, breakout spaces, strong Wi-Fi, hybrid-ready setup.
- Prepare materials that help people connect, like name tags, swag, or onboarding materials for new members.
- Align meals and break timing with the agenda's energy level and flow.
- Assign roles for note-taking or facilitation, and confirm how outcomes and next steps will be documented to share out afterward.
- Set a clear a per-person budget early and allocate spend toward experiences that bring the team together
- Coordinate group transportation when needed – grouping arrivals and departures simplifies logistics and reduces cost.

PRO TIPS:

- Keep the agenda light: stack high-focus sessions in the morning and reserve the afternoon for creative or social activities.
- Confirm materials needed for brainstorming including whiteboards, sticky notes, markers, breakout rooms, and more.
- Save attendee details, notes on what worked well, vendor support, and more for smoother planning next time.



Customer or Partner Meeting

Purpose: Build and strengthen relationships with clients or partners through clear communication, aligned expectations, and mutually beneficial outcomes. These meetings require a strong blend of professionalism, hospitality, and preparation.

Planning checklist:

- Confirm the meeting's main purpose and expected outcomes with internal stakeholders.
- Define what success looks like for both your internal team and your partner or customer.
- Understand relationship dynamics — decision-makers, communication styles, and past challenges.
- Ensure all proposals, project documents, and presentations are updated and ready.
- Personalize hospitality elements (dietary preferences, welcome notes, accessibility needs).
- Book appropriate dining venues that match the tone and purpose of the meeting.
- Arrange reliable ground transportation and communicate details clearly to external guests.
- Define budget expectations early to balance professionalism, comfort, and cost control.

PRO TIPS:

- End the meeting with documented next steps, owners, and due dates to maintain momentum.
- Add personal touches like handwritten notes or customized welcome materials as they make relationships memorable.
- If your meeting includes global teams, run a quick time zone comparison before choosing a date to avoid unbalanced schedules.
- Be aware of any sensitive dynamics or company politics to avoid surprises during important discussions.



Training or Workshop

Purpose: Equip employees or new hires with the knowledge, tools, and skills they need to succeed. Training sessions are structured learning environments designed around clear objectives and interactive engagement.

Planning checklist:

- Confirm learning objectives and sessions with HR or facilitators, so everyone aligns on outcomes, timing needs, and session flow.
- Test AV, internet, microphones, and any required software and optimize the room layout for visibility and engagement. For hybrid sessions, ensure remote attendees have access, logins, and clear instructions.
- Avoid scheduling conflicts with onboarding cycles or other HR-led programs.
- Prepare all materials in advance, including printouts, name tags, workbooks, and any supplies needed to keep sessions running smoothly.
- Coordinate simple, energizing meals and breaks that support engagement rather than slowing it down.
- Build your budget realistically using historical data and add a small buffer for surprise needs.
- Arrange easy-to-follow transportation guidance for attendees.

PRO TIPS:

- Send a quick pre-survey to understand skill levels and tailor session pacing.
- Partner closely with HR, as they can confirm attendee readiness, pre-work completion, and any additional details needed.
- Ordering breakfast and lunch in bulk from a local establishment can help keep costs manageable and timing smooth.
- Collect post-session feedback immediately to measure learning and improve future workshops.



Project Kickoff

Purpose: Align stakeholders on goals, scope, timelines, and responsibilities to launch a new project effectively. These meetings establish clarity, ownership, and momentum for the work ahead.

Planning checklist:

- Confirm the project's objective, scope, and success criteria with the project lead or executive sponsor.
- Prepare pre-reads early that clearly outline background information, goals, roles, and proposed timelines so attendees arrive prepared.
- Optimize the room or virtual setup for collaboration with the right screens, whiteboards, and breakout space.
- Choose flights with flexible cancellation policies to help manage risk, protect your budget, and allow for adjustments as plans evolve.
- Choose simple, energizing food that keeps people present and focused.
- Provide logistical basics such as venue directions, parking details, and expense guidance for attendees.

PRO TIPS:

- Recap decisions, owners, and deadlines before the meeting ends.
- Avoid vague action items — clarity early on prevents confusion later.
- Use visual aids (timelines, Kanban boards, flowcharts) to keep participants engaged and aligned.
- Once the meeting wraps, review your planned versus actual spend. These insights help strengthen your next meeting proposal or secure larger future budgets.



Conclusion

Every meeting type has its own purpose and planning demands. When you understand what each type requires — the goals, the audience, and the outcomes — you can focus on the details that will truly make it successful.



About TROOP

TROOP is a meeting planning and travel logistics platform that helps you plan in-person meetings with confidence. Built for meeting planners, TROOP saves you time, keeps meetings organized, and eliminates the need for spreadsheets or multiple tools. Compare locations, stay on top of budgeting, manage attendees, and more with TROOP.

Interested to learn more?

[Book a demo](#)

The collage displays several key features of the TROOP platform:

- Explore options for your meeting:** A search interface for finding meeting locations, showing 29 attendees and a meeting duration of 9:00 am May 10 - 5:00 pm May 14. It includes a search bar and a 'Sort: Suggested' option.
- Destination Comparison:** A grid of three destination cards: San Diego, CA; Dallas, TX; and New York City, NY. Each card includes a 'Confirm' button and a 'Download' icon.
- Meeting Details:** A detailed view for 'ACME Co Sync 2026' in San Diego, CA, showing meeting name, type (Internal), travel policy (Business), duration (6 days), attendees (29), and travel time (252h).
- Category Legend:** A vertical list of categories with corresponding color swatches: Accommodation (blue), Activities (green), Flights (yellow), Food & Bev/Meals (orange), Meeting spaces (purple), Transfers (pink), and Other (grey).
- Invitation Card:** A mobile-style invitation card for 'ACME Co Sync 2026' from Matthias Jones, dated May 10, with an 'RSVP here' button.