



Legacy Wise Experiences

Group Outing Readiness Checklist

Group organizers planning a day trip, show, seasonal outing or private experience.

Use this pack for planning. Vendor contracts, insurance, venue requirements and booking terms still need individual review.

Four checks before you proceed

Separate interest from confirmed bookings

Start with the purpose, audience and preferred dates. Record interest as interest until a customer has completed the actual booking process. Keep a single offer record showing what is confirmed, what is proposed and who can approve changes. Do not advertise a ticket location, benefit or inclusion simply because it appeared in a supplier conversation.

Build the complete trip budget

List fixed supplier costs, variable guest costs, taxes, fees and contingency. Compare scenarios using the same inclusions. Separate sponsorship collected from sponsorship merely discussed. Recalculate if the coach, venue or package changes. The objective is a financially workable offer with deliverable promises, rather than a headcount target copied from a previous outing.

Release one verified guest message

Create one final itinerary and use it as the source for the page, confirmation and reminder. Include meeting point, check-in, departure, included items, items purchased separately and day-of contact. Ask the venue and carrier about access arrangements. Collect only the information needed to coordinate the trip, using an appropriate secure process for sensitive details.

Reconcile and learn

Match actual receipts and supplier invoices to the event record. Record approved adjustments and unresolved service concerns. Ask guests what was useful and which future destinations interest them. Preserve the final itinerary and communication history. Review acquisition channels by inquiries and paid bookings so the next outing improves on evidence rather than post views alone.

Your next step

Open question	Who should answer	Next date

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