



Why have in-person retreats?

- It's a wonderful way to connect with your followers
- Create deep transformation in the people you work with
- To see real-life impact of your work
- Boosts your income
- You get paid to travel!

Before planning a retreat

These 3 steps are the foundation of having a successful retreat. If one of these is not present, you are not ready for a retreat yet.

1. Business Foundations established, with a clear understanding of target market and message.
Before marketing your retreat, you must have a target market. Who is your ideal client? Target people like them with a message that entices them to want to commit to your retreat.
2. Working on building email list or another network that you will market to.
Have a list of potential clients and a way to add to your list with those who are registering to your retreat. For example, if your clients are on Facebook, the event must be marketed on Facebook with a registration so you can have a way to contact them - usually an email.
3. Able to think of at least 5 people who would come on retreat right now.

— To-Do Checklist —

How to use the following checklist

Each section has a short bullet point list of what you need to do. Some items will be quick and easy, and some will take longer.

I recommend scrolling through the entire checklist first to see what's to come, as you might need to start working on some items down the list while you wait for items higher up to be completed (i.e. you might be waiting to hear back from venues, but you can start planning your itinerary in the meantime!)

Big Vision

- ☐ Your retreat WHY + vision clarified
- ☐ Mission statement and values outlined
- ☐ Ideal participant defined
- ☐ Clear outline of retreat transformation + outcomes
- ☐ Contacted possible partner for further discussion

Planning your Itinerary

- ☐ Retreat style chosen
- ☐ Workshop topics/themes/activities outlined (Rough)
- ☐ Schedule created, including workshop time, free time, meals, and one-on-one time
- ☐ Excursions decided upon and worked into schedule
- ☐ Extra touches/gift bags planned and built into budget

Budgeting and Pricing

- ☐ Decide how much profit you want to make
- ☐ Base price per person calculated
- ☐ Price of retreat decided on
- ☐ Early bird price set and deadline
- ☐ Decide how much the deposit is, and add to contract
- ☐ Decide on cancellation/refund policy, and add to contract
- ☐ Pre-sale email written/sent out

Preparing to launch

- ☐ Launch date decided and scheduled in calendar
- ☐ Early bird date decided and scheduled in calendar
- ☐ Registration close date decided and scheduled in calendar
- ☐ Sales page designed, written, and ready on your website
- ☐ Retreat contract and video/photography waiver prepared and ready to be signed by participants
- ☐ Application ready and embedded onto sales page
- ☐ Retreat package created
- ☐ Graphics and copy created and scheduled in social media
- ☐ Payment plan options outlined and set up in Paypal or Stripe (if applicable)

TIP: ADD Benefits to the Participants

How does your retreat differ and what benefits will it give your participants? This is not about what you are giving them. It is about what they are receiving.

Remember that connecting to their emotions is what sells.

On the next slide are some of the reasons people decide to book a retreat. Select those which work for you and include them in your marketing

Benefits you might add:

Provide peace away from daily routine

Surrounded by like-minded company

Access to professional guidance

Participants do not have to worry about planning

Retreats can be more economical than vacations

Long-term benefits

Nature lets you unwind

Marketing Checklist

- ☐ Personal Invite sent to at least 10 people
- ☐ Emails sent to “everyone you know” asking people to help you share
- ☐ Launch plan emails written and scheduled
- ☐ Webinar date set, webinar slides created, and webinar platform set up
- ☐ Social media posts written and scheduled
- ☐ Facebook ads set up

Before your Retreat

- ☐ Double check participant information
 - ☐ Print out retreat schedule and any other handouts for participants
 - ☐ Remind venue you are coming and make sure pickup plans are arranged
 - ☐ Last minute check in with participants
 - ☐ Set vacation responder in email and let clients know you will be mostly offline
 - ☐ Don't forget your passport if you're going international :)
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On your Retreat

- ☐ Welcome plan in place
- ☐ Set time to check in added to schedule
- ☐ Energy management plan in place
- ☐ Mentally and emotionally prepared to deal with sticky situations
- ☐ Planned times to video and photograph participants for marketing (add to schedule)

After your Retreat

- ☐ Additional resources sent to participants
- ☐ Upsell/additional coaching offers emailed to each client
- ☐ Feedback form created and sent to all participants
- ☐ Additional follow-ups scheduled in your calendar for 4-8 weeks later
- ☐ Follow-up with venue

— Common Mistakes —

1. Running a retreat too soon.
2. Not planning in advance.
3. Not putting enough emphasis on marketing.
4. Paying too much out of pocket.
5. Packing your retreat schedule too full or too loose.

1. Running a retreat too soon.

If you launch too soon, you stand the chance of

- wasting time,
- losing money, and
- hearing crickets.

So basically, the opposite of what you're hoping for.

Rule of thumb: if you can think of **at least 5 people** right now who would give you a solid YES to this retreat, you're probably good to go ahead and start planning.

You can think of potential participants from:

- from your client list,
- your personal network or

- your email list

No idea? - Best to hold off on planning and work on **growing your network before you do retreats**. Give it 6 months of intense community building and you could be ready to go!

2. Not planning in advance.

- Venues fill up fast.
- You can lose money with out of pocket expenses when you are in a hurry to find a venue (more on this later)
- Planning in advance gives you chance to market and sell your retreat.

How far in advance is far enough? Here are my guidelines:

- 4-6 months for a local retreat

6-12, months for an international retreat

Longer is better if you're not sure!

3. Not putting enough emphasis on marketing

- Market well in advance
- Market in several different ways:
 - Email marketing,
 - word of mouth,
 - networking
 - referrals,
 - Facebook ads,
 - a combo of other social media methods
 - Sales calls
 - Q & A calls

4. Paying too much out of pocket

How to avoid this:

1. Ask your venue to **save the dates for you without having to pay down a deposit**,
2. **Calculate how many people you'll need to sign on at the early bird rate** to be able to make your deposit,
3. **Pre-sell early-bird seats** to help you make the money you need to pay the venue. Get their deposits to pay for it, and place them on a payment plan.

If you don't fill those spots, you can always cancel and wait to build your interest list more before you try again.

The payment plan will enable you to use their payments to continue making any relevant bookings or payments for your retreat. Once you open up to the general public and have people rolling in, you'll be well on your way to profit and won't have to worry about losing money.

5. Packing your retreat too packed or too loose

- Pack it too tight, and there will be no breathing room to take everything in and just enjoy.
- Pack it too loosely and people won't understand why they paid a premium just to go on a vacation they could have booked themselves.

The discussion is where people get the most value, so leave lots of time and space for discussing between them what they are learning (sharing time)

- have a **morning check-in** with everyone after breakfast
- have a variety of **group activities** to choose from during the day
- Allow some **downtime**

Don't forget to plan time for:

- 1) registration and check-in, and
- 2) transitions (especially when the transition requires a location change).

Writing out your schedule

Questions to ask yourself:

1. What time are we allowed to be on site, and what time do we need to be off-site?
2. When are our assigned meal times?
3. What activities are available at the retreat center and what times are those activities available?
4. How many sessions/talks/meetings do we need to fit in?
5. How much free time do we want to give?
6. What do our evenings look like? Do we want to do ziplining, a campfire, or have some snacks, or do a private pool party, etc.? What options does the retreat center have for the evenings?
7. Does our schedule correlate with the retreat center's schedule?

Children/youth

If your event involves children/youth, it is always good to provide parents with a copy of your schedule. They like to know what fun activities their children will be doing, as well as what they are being taught so that they can have a positive discussion about it at home.

—Sample of a weekend retreat—

Arrival on a Friday - Sample

7:00 PM Whole group arrives at venue & unpacks.

7:30 PM Meetup – Bring Notebook (Meeting Room reserved till 8:30)

8:15 PM *SESSION 1* (Meeting Room)

Introductions and Sharing

Message

Small Group Breakout Discussion

Small group Reveals

Large Group Activity

10:00 PM Campfire/Smores (weather permitting) has to be done by 11 PM.

11:15 PM Leader Meeting

11:30 PM Cabin Time/Shower

12:45 AM Lights Out: Quiet Hours are from 11 PM to 7 AM and all activities must be moved indoors by that time. By midnight, everyone needs to be in their lodging area for the night.

Saturday Morning Sample

7:30 AM Breakfast (Dressed for zipline or other outdoor activity)

8:15 AM *SESSION 2* – Bring Notebook (Meeting Room)

Announcements

Grounding

Message

Large Group Activity

Meditation and Wrap-Up

9:00 AM Zipline Adventure Course or other outdoor activity

11:00 AM Free Time

11:45 AM Lunch

12:30 PM Group Picture

Saturday Afternoon Sample

1:00 PM One or Two possible 1.5-hour workshops to choose from

3:00 PM Two or more possible 1-hour workshops to choose from

4:00 PM Free Time/Camp Store, Cabin, Game in Meeting Room

5:00 PM Dinner

6:00 PM *SESSION 3* – Bring Notebook (Meeting Room)

Message

Small Group Breakout

Large Group practice on one of the main workshops

Saturday Night Sample

9:00 PM Snack provided

10:00 PM Free Time

Options – Meeting Room(s) Game or movie, Gym (10-11)

11:30 PM Cabin/Shower/BEGIN packing process!

12:45 AM Lights Out: Quiet Hours are from 11 PM to 7 AM and all activities must be moved indoors by that time. By midnight, everyone needs to be in their Lodging area for the night.

Sunday Sample

8:00 AM Cabin Cleanup: Checkout of lodging areas and move luggage to cars, or bus, (or to a pavilion if arriving later for pickup).

9:00 AM Breakfast

9:45 AM *SESSION 4* – Bring Notebook (Meeting Room)

Activity

Message

Personal Reflection

Small Group Breakout & Snacks

Farewell message

10:45 AM Begin Cleanup and packing meeting room

11:15 AM Departure

—What is a Virtual Retreat—

A “Virtual Retreat” is similar to an **online course**, however, it’s much more collaborative, interactive, and it’s a **shared experience**.

It creates an environment where people can connect and find as much meaning and **growth from the connections** they make as the content and structure provided.

1. **Put it on the Calendar.**
2. **Set the intention** or goal in which the event will be built around.
3. **Outline the agenda** with a good mix of fun and discussion.

Outlining the Virtual Retreat Agenda

1. Warm Welcome.
2. Introduction & Context.
3. Icebreaker.
4. Core Discussion.
5. Break
6. Activity
7. Reflection
8. Follow Up Discussion
9. Acknowledgment and Closing

We'll go over each step next.

Warm Welcome

- join ten minutes prior
- greet people as they connect
- after a few people have joined in, post a welcome question up on the screen or in the chat box to get people sharing

Examples for question:

“What is one thing you used to take for granted but really appreciate now?”

“What is something you have been watching/reading recently that you love?”

“If you could click a button and take one thing off your to do list, what would it be?”

Introduction and Context

Once everyone is connected,

- Start the program by sharing the intention created for the session
- Put people at ease by acknowledging the circumstances (background noise, a messy house, or kids interrupting is ok.)
- Go over any ground rules (mute the microphones, no permission necessary to go to bathroom or get a glass of water, stay with video on, etc)
- Outline the present day's agenda
- Introduce speakers

Icebreaker

- run a quick game or a fun activity to put people at ease
- identify at least two games for the event: one to play at the beginning of the session, and one to have ready if the group needs a laugh at some point during the session.

Core Discussion

- Based on the intention of the retreat, select 3 to 5 questions as the basis of the core discussion
- Give participants an opportunity to reflect and openly share about their experiences and ideas
- Before the Sharing, set some basic **ground rules** such as
 - 1) Length of share (1-2 minutes),
 - 2) Give other people a chance to speak before speaking again, and
 - 3) Always speak from personal experience.

“It is less important what we say to others, than what we empower others to say to us.”

- Mark Goulston, author of Just Listen

Break

Just like with normal meetings, people can only pay attention for a limited time and need breaks.

After about an hour:

- Give people 5 to 10 minutes to stretch, go to the bathroom, and get a drink.
- After the break is a great time to use the second ice breaker.

Activity

- Hands-on expression of what they learned off the core discussion
- Make it fun: inspiring, intriguing, or creative

Reflection

Shift from the core discussion to a reflection and follow up:

- Ask people what they learned
- Might ask them to take out the journal to reflect thoughts in writing
- Give examples, if necessary

Follow Up Discussion

- Start brainstorming about next steps for their growth
- Break-out rooms, as needed
- Might ask them to draw personal action plan as a reflective follow-up activity

Acknowledgement and Closing

Before wrapping up any retreat, it is important to leave time for people to express gratitude and appreciation.

- Ask a question like “Before we close today, does anyone want to thank someone, or share something else with the group?”
- After people share, the leader can thank everyone for their time and participation and say goodbye.

Acknowledgements and Resources for this download:

Jaslin Martin's Aligned Action Academy

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