



Retreat Planning CHECKLIST

1. INTENTION — Your Foundation

- Define your why: Why do you want to run this retreat?
- Decide who it's for (ideal client or past version of you)
- Clarify the transformation or outcome you want to offer
- Set a clear intention statement or vision for the retreat
- Choose a working title or theme
- Visualise your dream retreat and journal your goals
- Get specific: when, where, for who, how many guests





Retreat Planning CHECKLIST

2. PROGRAM & LOGISTICS — Design the Experience

- Research and shortlist potential venues

- Reach out, get availability and quotes, and confirm logistics

- Confirm venue and pay deposit

- Design the flow and format of the retreat (draft itinerary)

- Decide on inclusions: accommodation, food, workshops, activities, etc.

- Identify any guest facilitators or special services (massages, breathwork, etc.)

- Decide on your team/support needed to deliver the retreat





Retreat Planning CHECKLIST

3. PRICING — Plan for Profit

- Map out all costs (venue, catering, facilitation, marketing, materials, etc.)

- Set your profit goal and calculate break-even number

- Decide on your retreat price based on value + margins

- Determine payment structure:

 - Offer payment plan (e.g., 3 or 6 monthly payments)

 - Offer discount for upfront payment

 - Set deposit amount and deadlines





Retreat Planning CHECKLIST

4. MARKETING — Share the Message

- Gather brand-aligned images (venue, past retreats, lifestyle, YOU)
- Define your key marketing message (based on who it's for + what it delivers)
- Write your sales page or landing page (clear, value-driven, answers Qs)
- Create a 6-week email campaign (value, connection, storytelling, urgency)
- Create 6 weeks of social media (3–4 posts/week)
- Use a mix of formats: reels, photos, testimonials, lives, quotes
- Repurpose key messages from your sales page





Retreat Planning CHECKLIST

4. MARKETING — Share the Message

Tell everyone:

Direct messages to warm leads

In person at events, gatherings, and networking

Talk about it online and offline—again and again

Start again once your 6-week campaign ends — repeat the messaging

Even when you've sold out: KEEP TALKING

Share the story

Build FOMO

Promote the next retreat





Retreat Planning CHECKLIST

4. MARKETING — Share the Message

During the retreat:

- Capture photo/video content

- Gather testimonials live

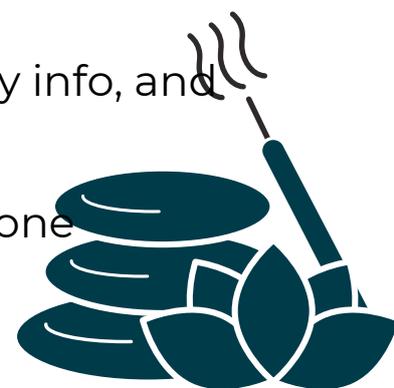
- Create highlight reels for future marketing

5. CUSTOMER SERVICE — Deliver With Heart

- Make the booking experience smooth + supportive

- Onboarding email with welcome, key info, and what's next

- Set expectations and tone from day one





Retreat Planning CHECKLIST

5. CUSTOMER SERVICE — Deliver With Heart

- Provide pre-retreat updates + checklist

- Prepare thoughtful welcome packs or gifts

- Set the retreat vibe: connection, care, communication

- Host with presence and leadership

- Collect feedback forms at the end

- Gather testimonials (video, written)

- Follow up after the retreat:

- Thank-you message

- Invite into next offer or retreat

- Ask for referrals

Ready to plan your retreat? Join the [Host Profitable Retreats Course](#).

