

The Retreat Countdown Checklist & Jumpstart Guide



Wanderlust
ENTREPRENEUR

Hi Retreat Lover!

I'm beyond thrilled that you're ready to dive into planning your very own transformational destination retreat. Whether you're dreaming of whisking your clients away to the exotic shores of Bali, the lush jungles of Costa Rica, the ancient ruins of Greece or Peru, or perhaps somewhere closer to home, you're in for an incredible journey.



Some of you might already be seasoned retreat hosts, or perhaps you're just dipping your toes into these transformative waters for the first time. Either way, you're probably imagining the warm sun on your skin, the taste of delicious local cuisine, and the profound pride you'll feel as you witness your clients transform in ways that are nothing short of miraculous.

But before you dust off your passport and start packing those bags, we've got some important work to do. Planning, promoting, and selling out a destination retreat takes effort and know-how—and let's be honest, no one wants to pour their heart into planning a retreat only to face the heartbreak of low attendance or financial loss.

The good news? When done right, retreats can be incredibly lucrative. We're talking about adding anywhere from \$10,000 to \$100,000 to your bottom line! But if you don't price them properly or cover all your bases, you could end up in the red. And let's not forget the legalities involved—because yes, they do matter.

That's exactly why I've created *The Retreat Countdown Checklist & Jumpstart Guide* for you.

After designing and managing over 1000 retreats since 2003 through my boutique travel agency, Journeys of the Spirit®, I know just how crucial it is to have a well-laid-out, month-by-month plan that you can easily check off as you go. Imagine the peace of mind knowing that you haven't forgotten a single detail, whether it's during the planning stages, your promotional period, or even while packing for your big trip!

In this **Countdown Checklist** and its accompanying guide, we'll walk through:

- **Twelve Months Before:** Planning and pricing your retreat, getting your retreat online, and marketing your retreat
- **Three Months Before Departure:** Final preparations and ensuring everything is in place.
- **One Month Before Departure:** The final countdown, packing, and last-minute checks.
- **After Your Retreat:** Reflecting, following up, and setting yourself up for even greater success next time.

But before we get into the nitty-gritty, let me share a story with you — about the first transformational destination retreat I hosted that forever changed my business.

It was back in 2003, and I was deep into one-on-one coaching and weekend workshops. My clients were making progress, sure, but I felt the urge to do something bigger—something that would leverage my time, boost my income, and create opportunities for deeper, more profound transformations. I knew it was time to step up and share my message with a larger audience.

My love for travel and the life-changing retreats I had experienced with my spiritual teacher, don Miguel Ruiz (author of the international bestseller *The Four Agreements*), inspired me to take the plunge and book my first retreat. As the departure date approached, I could hardly contain my excitement to leave behind my daily routine and board that plane to Mexico!





On the last day of this unforgettable journey, my group and I found ourselves atop the Pyramid of the Sun in the sacred ruins of Teotihuacan. The sun bathed us in warmth, and a gentle breeze whispered through the air as we completed a powerful and moving ceremony. As I gazed around our circle, then out over the ancient city, I was in awe of how far we had come in just a few short days.

The transformation in each person was palpable. (I wish I had taken before-and-after photos!) Together, we confronted fear, self-doubt, and judgment, forging a tight-knit group that would remain close for years to come. The hope, trust, and joy radiating from their faces mirrored my own delight—further confirmed by their words of appreciation and heartfelt hugs of gratitude.

In that moment, I knew transformational destination retreats had to be an integral part of my business.

Why? Because in just a few days, I witnessed transformations that would have taken months to achieve in a one-on-one setting. I also evolved as a transformational leader—honing my teaching and coaching skills, building my confidence, and gaining clarity. And to top it all off, I walked away with \$11,500 in just five days—far more than I was earning at the time with my private clients.

So, if you're a heart-centered entrepreneur, coach, or healer who wants to:

- Travel the world instead of being glued to a computer screen,
- Leverage your precious time,
- Showcase your multitude of talents,



- Amplify your transformational power,
- Share your message with a wider audience,
- Challenge yourself—and your clients—to grow and change,
- Monetize your retreats by seamlessly upselling your other services,
- Create another income stream while exploring stunning locations,
- And have a blast doing it...

Then it's time to have a step-by-step action checklist at your fingertips so you can start designing, promoting, and selling out your transformational destination retreat!

We've designed this checklist as a separate document so you can print it out over and over again as needed. Feel free to refer to it as you read through this jumpstart guide—or even laminate and reuse it if you like.

Now, let's break down the checklist section by section, so you know exactly what to tackle as you plan your trip.





Twelve Months Before: Planning + Pricing Your Retreat

What is a Transformational Destination Retreat?

Let's get crystal clear on what we mean by a transformational destination retreat, so we're all on the same page! For me, a transformational destination retreat is a custom-crafted, life-changing experience for your clients, typically in a group setting in a beautiful location. It's not just about whisking them away to a stunning place and teaching your material—that's only part of the equation.

The real magic happens when the location itself becomes part of the transformation, amplifying the impact of your teachings. It's not about where you want to go—it's about where your material needs you to be to create the most profound transformation. And trust me, this is a game-changer that not many people talk about.

Traditionally, a retreat is about withdrawing for refuge, contemplation, rest, and reflection. And yes, your retreat can be all about that. But it can also go beyond—a blend of experiences where your clients get to rest, recharge, and take away something deeply magical and special. What elevates a retreat from good to extraordinary is when the location itself becomes a living, breathing part of your teachings. That's the kind of retreat we're focusing on here.

Sure, you could plan a retreat on a picturesque beach—and who doesn't love a romantic beach setting? But if you align your location with your material, you might discover that other places can offer even more powerful experiences that will leave your participants awestruck (and raving about you for years to come!).

So here's the question to focus on: how can you translate the concepts you teach into deeply experiential activities?

For instance, imagine you're a health coach eager to help your clients change their relationship with food and self-care. In a typical workshop, you might have them sitting in front of a PowerPoint presentation all day. But on a retreat, you could take them to a stunning farmhouse in Tuscany, where they'd learn hands-on cooking techniques, participate in juicing workshops, and harvest fresh produce straight from an organic garden.

They'd experience the difference between locally grown and processed foods firsthand, and maybe even indulge in a detoxifying spa treatment or yoga session to support their transformation. The location and the activities become an integral part of the learning process, creating memories that last a lifetime.



Or let's say you're a leadership coach for corporate teams. Instead of a standard retreat at a hotel, why not charter a small sailing ship? Your team would have to work together, learning specific tasks and communication skills essential for sailing smoothly. This kind of experiential learning can have a profound impact when they return to the office, where the "ship" of their company needs to sail in the right direction. The retreat transforms abstract concepts into real-world applications.

Can you see the power of designing a retreat this way? It's more than just a weekend workshop; it's an immersive, transformative experience limited only by your imagination.

The Benefits of Using a Travel Agency or Tour Operator



Now that your creative juices are flowing with ideas for a unique and unforgettable retreat, let's talk logistics. What if you want to run a retreat in a location you've never visited? Or what if your retreat isn't based in just one spot but involves moving between multiple breathtaking locations?

In these cases, enlisting the help of a travel agency or tour operator, like my company, Journeys of the Spirit® Travel, can be a lifesaver.

Think about this: Imagine you're in a foreign country (or even an unfamiliar part of your own country!) where you don't know the lay of the land. Maybe you don't speak the language. Now, picture trying to negotiate hotel rates, coordinate transportation, find reliable local guides, and ensure that everything runs smoothly—all while keeping your clients happy and engaged.

That's a lot to handle for anyone who isn't a seasoned travel expert! And frankly, it's not your area of expertise—your gift is teaching, sharing, and creating transformation for your clients. Spending your valuable time on logistics is a drain on your energy and resources.

The extra cost of hiring a travel agency or tour operator is often offset by the discounts they can secure through their local connections and negotiation skills—not to mention the peace of mind you'll gain knowing that every detail is handled. This allows you to focus on what you do best: guiding your clients through a transformative experience.

Working with a travel agency also means you have someone to troubleshoot any issues that arise during your trip, often without your participants even knowing

there was a problem. For example, when my travel company plans a group trip, the facilitator knows they can contact us anytime, day or night, if something goes wrong. Plus, we've got local operators on the ground to provide immediate assistance. This level of support is incredibly comforting and smart.

So, be wise—partner with a travel agent who has the experience, connections, and expertise to arrange hotels, transportation, special activities, and excursions you might not even know about. You—and your participants—will be glad you did!



How to Price Your Retreat to Meet or EXCEED Your Projected Income

Now that you're clear on what you're teaching, the transformation you're offering, and the location that aligns perfectly with your content, it's time to grab your calculator and crunch some numbers.

Pricing is critical—you want to ensure that after all your hard work, you make a profit. This means including all your costs in the retreat price. And I mean ALL of them!

So, what should you include in your pricing? Here's a comprehensive list:

- **Room Package:** Cost per person for double or single occupancy.
- **Trip Leader's Package:** Your room cost (unless it's comped).
- **Supplies per Person:** Costs for materials, goodies, or anything you provide for your group.
- **Trip Leader's Flights:** Round trip, even if you're using points!
- **Extra Hotel Night:** Cost of arriving the day before.
- **Meeting Room:** If the retreat center or hotel charges for this.

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- **Participant's Meals:** Include per person if meals are separate from room costs.
- **Trip Leader's Meals:** Estimate total meal costs if not included.
- **Tips:** Any gratuities you'll need to provide.
- **Advertising:** Costs for promoting the retreat.
- **Phone:** Out-of-country cell phone fees.
- **Guides:** Costs for contracted outings or tours.
- **Entrance Fees:** For any planned activities.
- **Assistant's Costs:** If you bring a helper and cover their expenses.
- **Special Activities:** Costs for any unique experiences you offer.
- **Rental Car or Van:** For airport pickup or special transport needs.
- **Photographer or Videographer:** There's nothing like stunning photos to document your retreat.
- **Retreat Insurance:** It's critical to ensure your retreat in case someone is hurt or worse.
- **Contingency funds:** For unexpected expenses because you never know!
- **Credit Card Fees:** Typically, around 3-4% of the total trip cost.
- **Taxes:** State, local, or international taxes applicable.



- **Your Teaching Fee:** This is your profit! I recommend a minimum of \$100-200 per person, per day, but this can vary widely depending on your niche. High-end business or deeply transformational retreats can command anywhere from \$10,000 to \$50,000 net per person.

These numbers can be overwhelming, especially if numbers aren't your favorite part of running a business. But proper pricing is the difference between losing money and earning what you're worth—enabling you to live the lifestyle you've always dreamed of. That's why we share our proprietary Excel pricing sheet that we specifically designed for pricing retreats in all our retreat training programs.

Monetizing Your Retreat

While we're on the topic of money, let's talk about ways to monetize your retreat. The number one way is to ensure you have a follow-up program ready to offer your clients during the retreat.

Here's the deal: running a retreat as a one-off event isn't the best strategy.

For example, you could offer:

- **Private Sessions during the retreat.**
- **Pre & Post Retreat VIP Days & Intensives.**
- **Post Retreat Course or Coaching Program.**



Please, if you take away one thing from this guide, let it be this: you're putting so much energy into your wonderful participants, and not offering them a way to continue working with you afterward is a missed opportunity. They will likely need help integrating what they've learned and processing all that transformation. Without a follow-up program, you risk leaving them high and dry.

Going into your retreat with a well-crafted post-retreat program will benefit your clients and add significantly to your bottom line. Plus, you won't constantly chase clients to fill your programs and courses.

Your follow-up could be a three, six, or twelve-month group coaching program, individual coaching, a high-end group mastermind, or even shorter weekly group Zoom calls.

For example, a year-long deep-dive group coaching program at \$500 a month for 12 people would add an additional \$72,000 to your income. Or an eight-week online course at \$997 for 12 participants could bring in \$11,964. If just three of those 12 attendees signed up for year-long private coaching at \$750 a month, that's another \$27,000 in your pocket!

This one tip alone can make a HUGE difference in your bottom line. As you can see, it's not hard to add an extra \$10,000 to \$100,000 to a well-priced retreat. And that's truly exciting!

Retreat Legalities

I know the idea of running retreats is super exciting, and the potential to add serious cash to your income is exhilarating. But let's take a moment to cover some essential legal considerations that apply no matter where you're hosting your retreat.



First, keep in mind that if you accept money for a retreat with lodging, you're essentially accepting money for travel, making you a "Seller of Travel." This comes with specific legal responsibilities and regulations, so make sure you're operating within the law. You may need to work with a legal travel agency to handle these issues. Of course, there are ways around these concerns, which we cover in detail in our retreat training programs.

Here are three crucial steps to ensure you're legally covered:

1. Make sure you and your participants are properly insured.

This includes professional liability (errors & omissions) insurance for your business and liability insurance for your retreats or travel. Your participants should also have trip cancellation insurance.

- **Professional liability insurance**

protects you if a client claims they were harmed by your advice or services.

- **Errors and omissions insurance** covers you if a client is injured during the retreat and holds you responsible.

- **Trip cancellation insurance** reimburses your clients if they need to cancel their trip for a covered reason or if you, as the leader, must cancel due to illness or another unforeseen event.

These insurances offer peace of mind and protection, ensuring that both you and your clients are covered in case something goes wrong.

2. Have proper liability forms ready to send out to your participants. It's crucial to have your participants sign forms that clearly state they are assuming the risks of travel and releasing you from liability. These forms won't prevent someone from suing, but they provide evidence that your clients understood the risks involved.

Ensure your participants feel well-prepared, informed, and cared for by sending them all necessary information before the trip, including:

- **Trip Registration Form:** For basic contact info and flight details.

- **Trip Information Form:** All the details they need to know.





- **Packing List:** So they don't forget anything.
- **Statement of Psychological & Health Conditions Form:** To inform you of any medications or psychological issues.
- **Terms & Conditions:** So there's clarity on what they're getting.
- **Release of Liability & Assumption of All Risks:** To release you from liability.
- **Responsibility/Limitation of Liability Form:** To limit your liability. These forms should be tailored to travel-specific issues. Consulting with your lawyer to ensure you're properly covered is a wise move.

3. Plan your cancellation policy carefully. Your trip page and its cancellation policy are legal documents. It's vital to inform participants about what happens to their deposit if they need to cancel, whether their deposit is refundable, and when the final balance is due. This should be clearly stated in your marketing materials, so there are no surprises.

Ensure your cancellation policy aligns with the retreat center's payment schedule to maintain proper cash flow. You don't want to be out of pocket because of poorly timed payments. Even with the best planning, you may encounter refund requests or disputes. Having a clear policy and process can prevent misunderstandings.

Bottom line: Be properly insured, have the right forms, and set up a cancellation policy to ensure both you and your participants are protected and well-cared for.

4. Exit Strategy for Unforeseen Circumstances: Life is unpredictable and having an exit strategy ensures you can handle unexpected situations gracefully.

What to Include:

- Plans for handling sudden changes, like personal emergencies or global events (e.g., pandemics).
- Clear communication with participants about your policies in these situations.
- Contingency plans for rescheduling, relocating, or canceling the retreat.

Twelve Months Before: Getting Your Retreat Online

With your retreat designed and planned, it's time to get the word out—starting with a stunning, effective trip webpage.



A stellar retreat webpage means:

- No boring trip titles.
 - No run-on text without bullet points.
 - No hard-to-read text stretching across the entire page.
 - Clear information on who the trip is for and what attendees will gain.
 - High-quality, beautiful photos.
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- Detailed information on what's included and what's not.
 - Compelling reasons why someone would want to join your retreat, and what problems you're going to help them solve!

Just because your location is beautiful doesn't mean people will automatically sign up. You need captivating text that hooks your ideal clients, a visually appealing webpage, stunning images, and a seamless way to accept payments. If your retreat isn't selling, this is where you need to start making positive changes.

Having examples of great trip pages can be incredibly helpful. For instance, take a look at this retreat page my team created for a trip we designed for [retreat leaders in Teotihuacan, Mexico](#).

The most important aspect of this page? Before you even scroll down an inch, you'll know if this trip is for you. I've identified my audience's concerns, highlighted the location and food, outlined the amazing activities, clarified what participants will gain, and included all the necessary legal information.



Twelve Months Before: Marketing Your Retreat

Considering the time and financial investment involved in creating a retreat, it's wise to have a solid plan for getting your event out there and registering participants as early as possible. This ensures you have the cash flow necessary to cover deposits and other expenses.

Before 2008, I could post a trip on the Journeys of the Spirit® website and it would pretty much fill up at least two months before departure with little effort. However, with the rise of social media, retreats have become more common, and the way people book them has changed. It's now more challenging (but not impossible) to fill a retreat, especially with so many people signing up at the last minute.

Waiting until the last minute to promote your event is a big mistake, especially since most retreat centers require the balance payment 60 days before the event. In our retreat training programs, we teach a structured, phased approach to promoting your event. It might take a little longer, but it's the key to ensuring a profitable retreat.



And here's a crucial tip: the number one way to fill your retreat is by marketing your business year-round—not just the retreat itself. I recommend taking 6-12 months to fill your retreat. Advertising your retreat alone can be costly and eat into your profits, so focus on list-building and nurturing your audience all year long.

Key point: Market and grow your business, don't just advertise your retreat.

How do you ensure your retreat will fill at the end of those 6-12 months? Simple. Map out the list-building actions you'll take each month to promote your trip until it's full. This way, your retreat fills with people who already know and love you, rather than strangers who don't understand or appreciate your work. There's nothing worse than having a "PITA" on your retreat who negatively affects the vibe of your group.

Here are 16 free strategies to grow your following and fill your retreats:

1. Facebook Posts, Livestreams, Stories, or Reels
2. Instagram Posts, Livestreams, Stories, or Reels
3. TikTok
4. Facebook, Instagram & LinkedIn Messenger
5. Be active in groups on Facebook, Instagram, LinkedIn
6. Use your personal Facebook page and Instagram feed
7. YouTube
8. Send regular emails
9. Create freebies
10. Host webinars
11. Participate in summits
12. Hold live events
13. Encourage client referrals
14. Appear on podcasts
15. Engage in practitioner exchanges, joint ventures, or partnerships with influencers
16. Upload your email list to Facebook and run targeted ads



Choose the promotional activities that best align with your business and interests, and map out your monthly plan. Sharing content, educating, and teaching is the best way to fill your retreat—whether through podcasts, webinars, freebies, livecasts, summits, videos, live workshops, stage events, or all of the above.

But remember, simply posting your retreat on social media won't be enough. Today's successful retreats are filled through a concerted, ongoing marketing effort that establishes you as an expert in your field. Keep in mind that having a signature retreat model can help you build a brand and create consistency across your offerings.

Other Considerations to Have on Your Radar:



Crisis Management Plan:

Why It's Important: Even the best-laid plans can face unexpected challenges. Having a crisis management plan in place will prepare you to handle emergencies or disruptions, such as severe weather, health issues, or travel delays.

What to Include:

- A step-by-step plan for different scenarios (e.g., natural disasters, medical emergencies).
- Emergency contacts for local services (hospitals, police, embassy).
- Clear communication channels for keeping participants informed.

Sustainability and Eco-Friendliness:

Why It's Important: Increasingly, clients are conscious of the environmental impact of travel. Promoting sustainable practices can add value to your retreat.

What to Include:

- Choosing eco-friendly accommodations.
- Encouraging participants to engage in sustainable practices during the retreat.
- Partnering with local businesses that prioritize sustainability.



Health and Wellness Considerations:

Why It's Important: Ensuring the well-being of your participants is paramount, especially in a post-pandemic world.

What to Consider:

- Guidelines on maintaining health and safety during the retreat.
- Availability of health resources (e.g., access to medical care, wellness practices like yoga or meditation).
- Tips on travel health, such as vaccinations, insurance, and managing jet lag.

Client Onboarding Process:

Why It's Important: A smooth onboarding process sets the tone for the retreat and ensures that participants are well-prepared and excited.

What to Consider:

- A welcome packet or email series that includes everything participants need to know before the retreat.
- Clear instructions for completing registration forms, payment schedules, and preparing for travel.
- Personalized communication to address any questions or concerns.

Maximizing Retreat Experience with Pre-Retreat Engagement:



Why It's Important: Engaging participants before the retreat helps build excitement, fosters community, and ensures everyone arrives with a shared intention. Plus, it decreases the number of cancellations!

What to Consider:

- Pre-retreat webinars or virtual meet-and-greets to introduce participants and set intentions.
- Sending out preparatory materials, such as reading lists, meditations, or journaling prompts.
- Creating a private online group (e.g., on Facebook or a dedicated platform) for participants to connect before the retreat.

Diversity and Inclusion:

Why It's Important: Creating an inclusive environment ensures that all participants feel welcome and valued.



What to Consider:

- Guidelines for fostering a diverse and inclusive retreat environment, considering cultural, gender, and accessibility aspects.
- Tips on communicating inclusively and ensuring all materials and activities are accessible to everyone.
- Addressing dietary restrictions and accommodations for different needs.

Cultural Sensitivity and Immersion:

Why It's Important: Understanding and respecting the local culture enhances the experience for participants and fosters goodwill with the local community. For example, instructing the women on your retreat to Egypt to bring clothing that covers their legs and arms in public.



What to Consider:

- Briefing participants on cultural norms and expectations.
- Including activities that promote cultural immersion, such as local cooking classes or guided historical tours.
- Tips on respectful behavior, dress codes, and communication with locals.

Ethical Considerations in Retreat Planning:

Why It's Important: Maintaining ethical standards in retreat planning builds trust and ensures that your retreat aligns with your values and those of your participants.

What to Consider:

- Best practices for respecting local cultures and communities.
- Ensuring fair compensation for local guides, staff, and vendors.
- Transparency in pricing, terms, and conditions for participants.



Addressing Potential Language Barriers:

Why It's Important: If your retreat is in a non-English-speaking country, language barriers could pose challenges for both you and your participants.

What to Consider:

- Recommendations for basic language learning apps or resources for participants.

- How to navigate a foreign airport if your trip members are afraid of traveling internationally.
- Strategies for effective communication, such as learning key phrases like hello and thank you.

Personalizing the Retreat Experience:



Why It's Important: Personalization can significantly enhance your participants' experience, making each person feel valued and cared for.

What to Consider:

- Suggestions for gathering participant preferences before the retreat (e.g., favorite activities, dietary needs, goals).
- Customizing itineraries or offering optional activities.

- Personal touches, like handwritten notes, welcome gifts, or tailored experiences.

Creating Memorable Gifts for Your Peeps:

Why It's Important: Thoughtful gifts or branded materials can enhance the participant experience and serve as a lasting reminder of the retreat.

What to Consider:

- Ideas for eco-friendly or locally sourced gifts that align with the retreat theme.
- Suggestions for branded materials, such as journals, water bottles, or tote bags.
- Personalized items that make participants feel special.

Handling Group Dynamics:

Why It's Important: Managing different personalities and group dynamics is crucial for maintaining a positive, harmonious retreat environment.

What to Consider:

- Strategies for facilitating group bonding and ensuring everyone feels included.
- Tips for resolving conflicts or managing difficult participants.
- Encouraging open communication and setting clear expectations for group interactions.

Three Months Before Departure

Ah, doesn't it feel amazing to have your trip planned, your website up, and your promotion in full swing?

In these last three months before departure, it's time for a final marketing push since many folks tend to sign up in the last 30-60 days. Now, it's all about preparing to meet your participants! Being a prepared and organized facilitator inspires confidence in your clients. Now that your retreat is filling up, you'll have plenty of coordinating and communicating to do!





Social Media and Content Strategy:

Why It's Important: The last three months before you depart is crunch time! To fill every spot, you need to be committed to your marketing plan.

What to Consider:

- A social media calendar leading up to the retreat, during the event, and afterward.

- Creating shareable content (photos, videos, testimonials) to keep the buzz going.
- Encouraging participants to share that they're coming on your retreat.

Mindset Preparation for Facilitators:

Why It's Important: As a retreat leader, your mindset and energy will set the tone for the entire event.

What to Consider:

- Your self-care leading up to and during the retreat.
- Strategies for staying grounded and present, even in stressful situations.
- Mindset practices like meditation, visualization, or journaling to prepare for your retreat.

Participant Tracking

I can't stress enough how important it is to be well-prepared and organized for your trip. Your participants are placing their trust in you—believing that you're

capable of taking them out of the country, booking them in decent hotels, and handling any logistical or emotional challenges that might arise (and trust me, they will!).

You need to keep track of all your little ducklings, and that involves clear communication. Your participants will need to know the nitty-gritty details: what to bring, passport/visa requirements, where to meet, how to change money, how to contact you, and of course, what yummy snacks to pack!

You'll need to be on top of coordinating flights and transportation, figuring out room arrangements, noting food preferences, collecting passport numbers, and keeping track of all this information.

For every trip I offer, I use my trusty Participant Tracking Template. It keeps everything I need to know about my participants in one place—from personal information, flights, and food preferences, to emergency contacts (which are a must-have), rooming lists, and more.

The more clearly you communicate and the more organized you are, the fewer headaches you'll have. Your participants will feel confident knowing you're prepared to take care of them on your retreat.



One Month Before Departure

Now it's really getting exciting! Your trip is almost here, and it's time to start packing, double-checking everything, and printing anything you need to bring

along. Make sure you've got everyone's signed liability forms, registration forms, and full payments.

Don't forget to pack essential handouts, gifts for your participants, your post-course follow-up offer, and emergency contact info in your carry-on. I've had my bags not make it to my destination more times than I care to remember, so anything critical for your retreat should always be in your carry-on!

It's also wise to put together a first aid kit in case your participants don't bring the items you recommended in your packing list.

And now, off you go to your fantastic destination retreat!



After Your Retreat

Take a moment to imagine this: You've just returned from guiding a group of incredible clients who are deeply engaged with your teachings. Transformations happened every day, and you worked with them in a beautiful place you've always dreamed of visiting. It's pretty amazing, right?

Now, let's ensure you reflect and follow up from your trip to be even more successful and profitable next time. You'll want to confirm that you made the money you estimated you would on the trip (because you priced it properly, including everything, right?).

It's time to reconcile your trip expenses and review your pricing.

Go through the surveys from your participants and think about what you can improve for next time. Also, make sure everyone is on your newsletter list. And, of course, don't forget to sincerely thank your participants for coming! Sending out a

beautiful card with a group photo is a lovely gesture. Before you know it, you'll be ready to dive into planning your next adventure!



Post-Retreat Evaluation and Feedback:

Why It's Important: Gathering feedback is crucial for understanding what worked well and where improvements can be made for future retreats.

What to Consider:

- A structured post-retreat survey (questions could cover overall satisfaction, specific activities, accommodation, food, etc.).
- A debrief session with your team (if you have one) to discuss what could be improved.

Client Retention Strategies:

Why It's Important: Retaining clients for future retreats or programs is as important as attracting new ones.

What to Consider:

- Offering exclusive discounts for repeat participants.

- Creating a loyalty program or referral incentives.
- Engaging with participants post-retreat through newsletters, social media groups, or follow-up coaching sessions.

Post-Retreat Marketing:

Why It's Important: Capitalizing on the momentum from a successful retreat can lead to future bookings and referrals.

What to Consider:

- Strategies for capturing testimonials and case studies immediately after the retreat.
- Tips for sharing retreat highlights on social media, blogs, and newsletters.
- Encouraging participants to share their experiences and tag your business in their posts.

Creating a Legacy or Impact Beyond the Retreat:

Why It's Important: Some participants may seek deeper meaning or long-term impact from their retreat experience.

What to Consider:

- Ideas for incorporating a charitable component, such as donating a portion of proceeds to a local cause or organizing a volunteer day. This is something I include in almost ALL my retreats!
- Encouraging participants to implement what they've learned in their communities.



- Offering alumni programs or ongoing support to extend the retreat's impact.

Building Long-Term Client Relationships:

Why It's Important: A retreat can be the beginning of a long-term relationship with your clients, leading to future business opportunities.

What to Consider:

- Strategies for nurturing relationships post-retreat through regular communication, follow-up programs (remember we talked about having a post-retreat offering at the ready?), or exclusive offers.
- Creating a community of retreat alumni who can stay connected and support each other.
- Encouraging testimonials and referrals to build your client base.

Developing a Long-Term Retreat Strategy:

Why It's Important: A long-term strategy helps you build a sustainable, profitable retreat business over time.

What to Consider:

- Setting long-term goals for your retreat offerings (e.g., number of retreats per year, income targets).
- Creating a timeline for expanding your retreat business (e.g., adding new locations, growing your team).
- Building a brand around your retreats and establishing a strong market presence.



Retreat Checklist

Twelve Months Before: Planning + Pricing Your Retreat

- ☐ Get clear on who the trip is for (target market).
- ☐ Figure out the key pain points or desires that are driving your people to your retreat .
- ☐ Nail down the benefits of your retreat (of both your teachings themselves and the location, food, etc).
- ☐ Decide on your promise (In 1-2 sentences, what are your participants going to come away with?).
- ☐ Choose what you're going to teach.
- ☐ Lay out what you're going to teach day-by-day so it builds to a logical conclusion.
- ☐ How many days and how many people do you want?
- ☐ Pick a couple of locations that work with your theme.
- ☐ Check on the yearly weather of your location.
- ☐ Check that the area is safe according to your government's travel website.
- ☐ Confirm whether folks need special immunizations or medications for that location.
- ☐ Determine how much it will cost for participants to fly there and how long it will take.

RETREAT CHECKLIST

- ☐ Make sure the currency exchange is acceptable.
- ☐ Start gathering info on local customs and dress codes for your group.
- ☐ Decide who is going to be your assistant.
- ☐ Use a Travel Specialist if you need help with a trip or itinerary, such as our amazing Ales Struna at Journeys of the Spirit (our travel company that specializes in retreat management). You can contact him at ales@journey-softthespirit.com.
- ☐ Contact the retreat centers, villas or boutique hotels for pricing and details.
- ☐ Ask them for some fun suggestions for special experiences based on what your theme is and the pricing.
- ☐ Ask what there is to do in the area and what is worth seeing and if any of those align with your theme.
- ☐ Decide which place is top on your list.
- ☐ Negotiate your contract.
- ☐ Figure out if you want to use an application process and if so, create that now.
- ☐ Decide on the special goodies you are giving on your event.
- ☐ Create your pricing worksheet based on the smallest and largest number you feel will attend.
- ☐ Using an early bird special as a marketing strategy? Make sure you put it in your pricing.
- ☐ Start thinking about your post-retreat program/upsell to monetize your retreat.

RETREAT CHECKLIST

- ☐ Research "Seller of Travel" legalities in your country, state or province.
- ☐ Make sure you have Professional Liability Insurance for your business and retreat insurance (or tour operator's insurance) that specifically covers you on your retreat.
- ☐ Look into Trip Cancellation Insurance to recommend to your participants.
- ☐ Get your trip forms (Participant Tracking Template, Trip Registration Form, Trip Information Form, Please Don't Forget Me Form, Statement of Psychological & Health Conditions Form) and legal forms (Terms & Conditions, Release of Liability & Assumption of All Risks, Responsibility/Limitation of Liability Form) all ready and customized such as the ones we gift you in our retreat training programs.
- ☐ Create your cancellation policy based on your retreat center, hotel or villa contract.
- ☐ Decide on how you're going onboard your retreat participants and what's going to be in your welcome packet.

Twelve Months Before: Getting Your Retreat Online!

- ☐ Start working on your retreat website page by getting your URL or add a page to your existing website.
- ☐ Have your web person install Word Press or use Wix, Squarespace, or Leadpages for your trip page.
- ☐ Have a beautiful header designed by your graphic artist or make your own in Canva.
- ☐ Buy beautiful royalty-free pictures for your trip page based on your itinerary or use [Unsplash.com](https://unsplash.com).
- ☐ Create your delicious text to hook your perfect attendees.

RETREAT CHECKLIST

- ☐ Decide on the general layout + template for your trip page.
- ☐ Start plugging in your text and pictures as per your template module by module.
- ☐ Make sure you address all the concerns your ideal client might have that would prevent them from registering.
- ☐ Build value on your trip page to justify the cost of your retreat.
- ☐ Using video? Start designing your script for your promotional video.
- ☐ Make sure your online store is working and/or PayPal integration.
- ☐ Collect client testimonials in video (if possible) or at minimum with head-shot, full name and title.
- ☐ Create a Facebook group for your peeps.

Twelve Months Before: Marketing Your Retreat

- ☐ Layout your launch strategy/marketing plan month by month for a 12-month period.
- ☐ Apply to be a guest on any podcasts that have your target audience NOW.
- ☐ Layout your marketing strategy for the year.
- ☐ Create a freebie to grow your list with fresh leads to nurture and share your retreat with.
- ☐ Design your social media schedule using Facebook, Instagram, LinkedIn, TikTok, and/or X.
- ☐ Consider doing joint ventures to promote your retreat and pay a commission (make room in your pricing for this!).

Six Months Before Departure

- ☐ Design your crisis management plan.
- ☐ Pick a date for your first group call to keep the energy high and folks engaged.

Three Months Before Departure

- ☐ Send out pre-trip legal & logistics forms such as Trip Information Form & Please Don't Forget Me Form on – passport/ visa requirements, where to meet, changing money, how to get in touch with you, snacks to bring, etc., Statement of Psychological & Health Conditions Form, Terms & Conditions, Release of Liability & Assumption of All Risks, Responsibility/Limitation of Liability Form such as the ones we gift you in our retreat training programs.
- ☐ Coordinate flights, rooming list etc., and enter data in your worksheets as participants send in their forms.
- ☐ Push to fill your retreat IF it's not filled yet.
- ☐ Have a pre-retreat Zoom call with your group to get them ready.
- ☐ Create a survey for your people to give them at the end of your event.

One Month Before Departure

- ☐ Print anything you need to bring on your retreat.
- ☐ Make sure you have everyone's signed liability forms, registration forms, and payments in full.
- ☐ Pack your handouts, giveaways, etc in your carry-on.
- ☐ Have your post-retreat course offer printed and pack it in your carry-on.

RETREAT CHECKLIST

- ☐ Put together a first aid kit to bring in case participants do not bring the items you told them to bring from your packing list.
- ☐ Don't forget YOUR passport and/or visa!
- ☐ Make sure you have extra cash for tips and unexpected issues with you.

During Your Retreat

- ☐ Follow your plan for rest, self-care, and rejuvenation during your retreat.
- ☐ Make your post-retreat offer to your peeps the day before your retreat ends or the day before that day if appropriate.
- ☐ Make sure you get testimonials during the retreat – preferably video ones!

After Your Retreat

- ☐ Reconcile your trip expenses and make sure your actual expenses match what you estimated (and learn from your mistakes).
- ☐ Send a thank you to your participants.
- ☐ Have your post retreat group call to support the process of “re-entry” for your participants and get them registered for your post-retreat offer.
- ☐ Work on your post-retreat social media posts to get folks drooling for your next adventure.
- ☐ Review surveys and decide what you can do even better next time.
- ☐ Send info to anyone not signed up for your post-retreat program.
- ☐ Make sure folks are on your newsletter list.
- ☐ ***Plan your next adventure!***

So ... what's next?

Want more juicy info about how to create your amazing retreat?

We've got our "**Rock Your Profitable, Sold-Out Retreat**" live online event happening **May 6-8th** and you're invited!

Make sure you register ASAP.

