



Retreat Planning 101

How to Plan Your First Retreat

Step One: Visualize your Retreat

The first step in the process is to get clear on what you envision for your retreat experience. This will support you when diving deeper in your research and staying true to what is most important to you, your brand and your audience.

Know your WHY

Your WHY is your main purpose for gathering. Once defined, you can come back to it as you make decisions about location, itinerary + more.

Know your WHO

WHO is the main audience for this retreat? Defining this will support everything from the creation of the ideal experience, pricing, outreach and more.

Based on your WHY + WHO, begin to brainstorm WHAT you will offer.

What is the ideal location?

What time of year will be best?

What is the duration of the retreat?

How many guests will attend?

What is the vibe of the retreat?

What will be a part of the itinerary/experience?

What will be excluded?

Circle the ideas that evoke the retreat experience:

local domestic international beach mountains water luxurious intimate rustic
adventurous relaxing educational silent fun organic simple party

add your own words _____

Support

*What part of the retreat experience are you excited about? What part will you need support?
(i.e. teaching, marketing, budget, specialty workshops, audience, etc.)*

Step Two: Research

Get curious. Start your online search for spots that match your retreat vision.

Need help planning?

We Travel

Want to have a teaching vacation?

Fit bodies, Inc Teaching Vacations

Want to teach abroad for a living?

Yoga Trade

Local Retreats

Contact local boutique hotels and connect with their events team. Share your idea for hosting a local retreat. Create a unique package for your guest (i.e. daily class, discounted spa services, meals, etc.)

TIP: Consider low season at local hotels where you have more room for nightly rate negotiation. Work with their marketing team to see if they can market your retreat as well.

Vacation Rentals

Consider Airbnb + VRBO to customize your retreat experience. These are great options for smaller groups and a great way to create an intimate + customized experience.



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Step Three: Budget

Once you have pinpointed your ideal retreat location, create your budget so that you are clear on expenses. In addition, understand your financial **WHY** behind this retreat. (i.e. Have a fun adventure and cover your expenses or Create an additional revenue stream for my teaching business).

Determining this will help you set a price point for your ideal retreat guest as well as ensure you generate the profit you desire.

Use the [Retreat Budget Template](#) to map out your plan to create a financially successful retreat.

Step Three: Take Action

Once you have done the research and created a budget, it is time to take action and bring your first retreat to life.

- Make your guest list. Who do you want on this retreat? Who will make it memorable? Who did you create it for? Personally invite these people to your retreat. Include your compelling WHY.
- Create an engaging email and send to your email distribution list.
- Utilize your social media channels to educate your audience on the reasons to retreat.
- Post on your website. Ensure registration is as easy as 1-2-3.
- Write a blog post with a retreat theme: reflection, community, deepening your practice, etc.

What is on your action list?

Inspired Retreat Lead: Want more ideas + support? [Head over to the shop](#) to download your "Retreat Organization Guide".



Need more support creating your dream retreat?
Schedule a 1-1 Coaching Call to receive customized guidance.

Sheri Colosimo has been leading memorable retreat experiences since 2009 with her company Más Bliss Retreats. These customized mini-getaways for women offer an opportunity to pull back and connect back to self in beautiful settings across the country and beyond.

About the Lead:

Sheri is a respected leader and trusted confidante for small businesses. Her 20+ years of hands on experience gives her expert knowledge on how to effectively create achievable business strategies that inspire action. She is able to capture the “bigger picture” while finding balance in both vision and strategy – a gift unparalleled in the industry. Her coaching style blends compassion and intuition with her incredible experience of developing confident heart-based leaders interested in deepening human to human connection.

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