

Create your Dream Retreat

The ultimate planning guide to help you create your dream retreats with ease!



Create your Dream Retreat



Do you dream of holding a retreat for your clients...

and have no idea where and how to begin planning it?

Do you want to know how to find a location that matches your transformational vision?

Do you want a checklist to follow that tells you exactly how to plan your retreat?

Your Create your Dream Retreat guide gives you an extensive checklist of what you need to know to create successful retreats for your business.

Create your Dream Retreat



You have been dreaming about hosting a retreat and you have so many questions.

Are you feeling overwhelmed and don't know where to start?

This guide will help you to...

- Define the goal of your retreat.
- Create the theme of your retreat.
- Identify your ideal participants.
- Choose the perfect location.
- Select the right venue.
- Decide what to include or not to include in the price.
- Find the right tours and activities to compliment your message.
- Create an unforgettable experience for your participants.

Set your Retreat Goals



Step 1 Set the Goals of your Retreat

A) Getting started - The idea stage.

What is the vision you have in your mind for your dream retreat?

This is where you get to dream and focus on what is the goal for your retreat. It is key to the success of your retreat that you are crystal clear on the vision and goal you have for your retreat.

- What do you want your participants to take away from the retreat?
Take some time to sit down and envision what it is you want your clients to learn, master, or shift on your retreat. Get very clear on exactly what your goals are.
- What do your ideal clients want to learn from you that will benefit them the most? It can be very helpful to do some market research to survey your ideal participants and ask them what they would like to learn from you on a retreat. The answers may surprise you and can help you create the retreat that will be an instant "Yes!" when you announce it to your clients.
- Do you want them to learn or master a new skill? If so, what skills are they, what would you like to teach them. Do a brainstorming session with yourself. Sit down with a blank piece of paper and let all the ideas flow out. Then go back and see which ideas fit together to support your goal for the retreat. Now go back and see which ideas directly address what your potential clients shared with you in the market research you have done.

Think about how these skills and lessons fit into the context of a retreat. For example teaching deeply personal topics may not translate well in a group situation, Some skills and lessons are great in groups, others may be too personal to allow people to open up in a group situation. Keep this in mind as you make your retreat plans.

Set your Retreat Goals



Step 1 Set the Goals of your Retreat

A) Getting started - The idea stage, continued.

Do you want them to disconnect and relax? Most people consider retreats an experience to completely unplug from their daily world. An experience to completely let go of their stress and worries. How will you create a safe space on your retreat that will enable your guests to feel totally relaxed. You can build in free time, relaxing activities, such as everyone gather in the pool or hot tub, or story or share time around a campfire. You can book a venue that has a spa with treatments and massages available and allow time in your schedule so they can take advantage of the spa services.

Giving people quiet time to reflect and process can be the key to letting their personal aha! moments and breakthroughs to happen. Consider scheduling time for journaling and/or walking meditations in a mountain meadow, the shores of a lake or river or along an ocean beach. Some of the best realizations can come on a walk in nature.

Do you want them to bond as a cohesive unit? Build in some team building activities, such as a fun memory name game in your first gathering, then include something like ziplining, swimming with dolphins, cooking together, kayaking, white water rafting, doing a scavenger hunt, visiting a local temple or museum or taking salsa dance lessons.

Sharing these kinds of activities will not only be fun and allow your guests to experience the local area and culture, it will also build strong and often life-lasting bonds between your participants.

Set your Retreat Goals



Step 1 Set the Goals of your Retreat

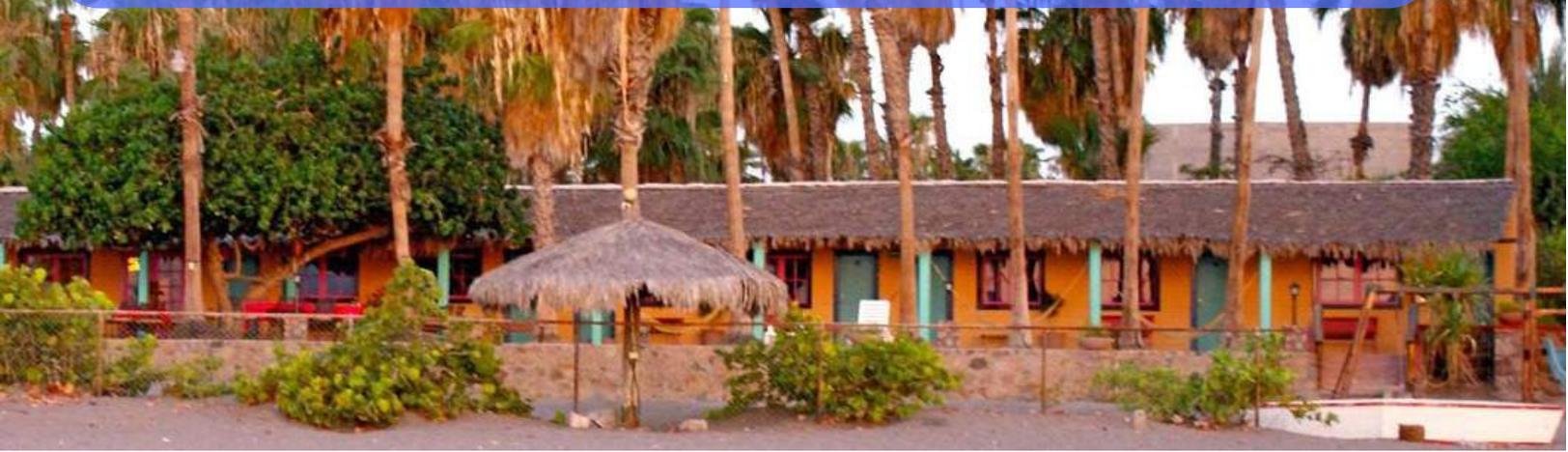
B) Identifying your ideal retreat participants.

- Make a profile for your ideal client. Age, interests, gender, income, etc. Who is your ideal client? Are they male or female? How old are they? What is their type of profession, such as corporate, entrepreneurs, retired, teachers, health workers, etc. What income level are they? What are their hobbies and interests, such as stamp collecting, knitting, cooking, dogs, whales, etc. Create an avatar for your ideal client and describe him/her as if you knew them as well as your best friend. This will give you a clear idea of who and how you want to attract them to your retreat. It will also help you to choose a location, venue and activities they will enjoy.
- Define their goals and the results they are looking for. Now that you know exactly what kind of person is your ideal retreat participant, you can easily identify their goals, the challenges they are facing and the benefits and results they are looking for. For example, they could be single ladies between 30-40 years old looking to attract their soul mate, so they will want to learn skills to make themselves more self confident and to feel better about themselves. They will also want to know flirting techniques, best places to safely meet their potential life partners and how to discern who is a keeper and who is not.

Using the same example, you could hold your retreat in a location and venue with activities that also attracts single men so they can try out their skills during the retreat!

Knowing all of these things will help you to design your perfect retreat when you keep your goals in mind.

Location, Venue & Activities



Step 2 Location, Venue and Activities

A) Choosing the right location that matches your transformational vision.

The destination is equally as important as the results you offer.

- Local, regional, national or international. If you choose a local location, a short drive away from a major city where most of your participants live, then you are making it super easy for people to say "Yes." If you are drawing from a regional or national client list, then you can choose a location that is a natural draw to your clients. Pick a place that your ideal client would choose to go on vacation, some place they have always wanted to visit.

If you choose an international location, make sure your clients are comfortable traveling out of their home country. Do they have a passport? Does the location require a visa to visit? Do you or someone on your team speak the local language? How reliable is the electricity, is their internet available and is the water safe to drink? Are there any local customs you need to adhere too, such as women must cover their heads in some middle eastern countries.

- How easy is it for your participants to travel to your destination? Think about ease of travel for your participants. How expensive and easy is it to arrive at your retreat destination. You may find the most amazing location in the world, but if it takes 2 or more flights and more than 1 day to get there, some people will instantly say "No."

Is the hotel easy to get to from the airport? Does the hotel have a shuttle to/from the airport? You want to make your location as travel friendly as possible to put your less experienced guests at ease.

- Does it complement the goals of your retreat? You should choose a location that perfectly fits your retreat goals. For example, a food and Italian cooking retreat should

Location, Venue & Activities



Step 2 Location, Venue and Activities

A) Choosing the right location that matches your transformational vision, con't.

- Does the location complement the goals of your retreat? You should choose a location that perfectly fits your retreat goals. For example, a food and Italian cooking retreat would be perfect in Tuscany, but would not work so well, in say, Hawaii, which is a great location, but not one that people think about when they think of learning to cook and eat good Italian food.

B) Selecting the perfect dates

- Local weather. What are the weather patterns in your chosen location? For example, Sedona is a magical place for a retreat, but maybe the middle of August when the temperatures are in the mid 90's. Making it impossible to enjoy relaxing hikes in the beautiful canyons, and even putting your guests at risk of sunburn, heat stroke or dehydration. Always check out the best time of year to visit that location.
- Holidays, both at the location and your client's home. When picking the dates for your retreat, always keep in mind what are the holidays and local events at the location, especially if it is an international location. For example, in Panama, where I live, you might think mid-February is a great time to hold your quiet yoga beach retreat on the Azuero peninsula. However, mid-February is Carnaval in Panama and the majority of the population of locals all travel to...the Azuero peninsula for 4 days of endless parties, complete with 24 hour, loud music, huge crowds, parades, and beer everywhere! If you are looking for that kind of retreat, great! If you want a quiet, introspective yoga retreat, avoid the middle of February!

Keep in mind what holidays and events are happening where your clients live that may keep them close to home and interfere with them being able to attend your retreats, such as mother's day, school vacations, etc.

Location, Venue & Activities



Step 2 Location, Venue and Activities

B) Selecting the perfect dates, con't.

- When is peak tourist season at your location? If you choose a location along a beach, it is important to be aware of the most crowded months. If you are asking your guests to do a quiet walking meditation on the beach, but the beach is filled with people swimming, playing volleyball and partying, there won't be much meditation going on!

Now, of course, the best weather is usually also during high tourist seasons. However, often times the shoulder seasons, just before and after the high season, the weather is still lovely and there are a lot less people around to give your group the quiet and space you want.

A bonus to choosing a shoulder season is that often the venue rates are less than during the peak tourist season. Flights can also be less expensive.

C) Choosing a venue

- Do you want a hotel, retreat center or rent a house? Choosing the right venue is huge. The facility you choose to hold your retreat can make or break the success of your retreat. Do you want to be in a large, luxury hotel with all the services? Or would that be overwhelming and less intimate for your clients? How about a smaller, boutique hotel that makes people feel pampered and special? You could contract with a retreat center that has all the facilities for your gatherings, but maybe the sleeping areas are more like summer camp. You could rent an entire house if you have a smaller group. Renting a house can be the ultimate in creating an intimate feel to your retreat, but you may sacrifice some privacy in return. These are all things you need to think about when choosing your retreat venue.

Location, Venue & Activities



Step 2 Location, Venue and Activities

C) Choosing a venue, con't.

- What is the feel of the venue and does it match your retreat goal? Does your venue match the feel of your retreat? If your retreat is all about connecting with nature, then a big city, large hotel is not the right choice. But, a retreat center or lodge in Montana would be perfect.
- What amenities are offered at the venue? Does your venue offer meals? Is breakfast included with the price of the room? Do they have a spa and/or a masseuse? Is there a pool or hot tub. Are there recreational activities at the venue?
- Is there a good meeting space for your group gatherings? Make sure you choose a venue that has the right sized, (and priced) meeting room for your group gatherings. Check to see if they have comfortable chairs, is the meeting space heated. Make sure it is equipped with everything you need for all your planned activities.
- Is there food easily available at the venue? Are meals provided? Is there a restaurant at the venue? If not, are their restaurants and stores nearby, ideally in walking distance?
- Do they have the equipment you need? Does the venue have a projector and screen if you need them? Will you need a microphone and sound system for music? What else will you need that the venue can provide for you?
- What is the cancellation policy? This is very important. Find out what the cancellation policy is if worse case, you have to cancel the retreat, can you get your deposit back or will you be liable to pay for all the unused rooms?

Location, Venue & Activities



Step 2 Location, Venue and Activities continued

D) Meals

- Should you include the meals or not? You can hold an all inclusive retreat with all meals included, but then you are responsible for managing all that goes into making sure everyone's needs are met. You can choose to let people eat on their own, which takes the meals off your list, but then you often have to allow more time for them to find their own food.
- Will you be able to accommodate food allergies and dietary restrictions? Can the restaurant or chef cater to a variety of dietary meals like, vegan, gluten and dairy free and food allergies?
- Does it complement the goals of your retreat? Again, keep in mind, if your retreat is all about a healthy lifestyle and the only food available is meat and potatoes with an iceberg lettuce salad, that will be very dissatisfying for your clients. Food is usually the first thing people complain about so make sure the food available is exactly what your ideal client wants.

E) Transportation

- Will you include airport pick ups and drop off service? If your venue provides an airport shuttle, fantastic! If not, think about how easy it is for your clients to get to the venue from the airport, especially in an international location. It can be a nice touch to hire a local service to provide transportation to and from the venue
- To and from meals? If there is no food available at your venue, then how will your guests get to and from local restaurants? If you want to eat together as a group, it is a good idea to hire a van and driver to take you to and from your meals.

Location, Venue & Activities



Step 2 Location, Venue and Activities continued

F) Tours and activities

- Find interesting things to see and do in your location to enhance the experience for your participants. Arranging unique activities will take your retreat to the next level and make it unforgettable so your clients will rave about their time with you to all of their friends and colleagues.
- What kind of tours are there in the area? Ask your venue and do some research about what kinds of tours are available in the area. Maybe you can do some whale watching, wine tasting, visit local artisan markets, check out caves or volcanoes, take a sunset dinner cruise. Make the tours interesting, maybe you can go behind the scenes with a local chef in his kitchen, or meet a local craftsman or expert in the area.
- Select activities and tours that are in sync with the feel of your retreat. Always keep in mind the goals and theme of your retreat. If you are holding a knitting retreat, then visiting a local sheep, llama or alpaca farm to see how they collect, process and turn the wool into yarn, or you could visit a company that uses natural dyes to make colorful yarn.
- Set a goal for the tours and activities. When you select the right experiences for your retreat, you can turn them into teaching moments while everyone is enjoying the experience. For example, if you are running a retreat on how to attract prosperity into your life and you offer a whale watching tour, you can teach that whales represent abundance, being the largest animals on Earth, who eat the smallest, and you never see a skinny whale!

Location, Venue & Activities



Step 2 Location, Venue and Activities continued

F) Tours and activities

- Team and community building activities. Shared experiences naturally pull your group together and build strong bonds. Think about how you can include some activities where the group has to work together either as a big group or in pairs or groups of 3-4 people. You can set a fun challenge for them to work together to surmount. This could be a scavenger hunt, doing a ropes course, maybe tandem bicycling or kayaking. How about white water rafting or trust activities, like leading a blindfolded partner through a maze?
- Local culture, art and cuisine. Be sure to give your guests an opportunity to sample local foods. You could check out a local music festival. Maybe the area is known for a unique type of music or dance, such as in Hawaii you can take hula lessons, make flower leis and attend a traditional luau. Is the area known for a special kind of art, or are there local gemstones or crystals found there? Do some research to find out the best way to experience the local food, culture and art of the area.
- Remember play and quiet time are important too. Do not try to fill every moment of your retreat with content or activities. Quiet rest time is equally important for your participants. The sign of an expert retreat leader is knowing when and how much free time to give your clients. A good rule of thumb is to make sure you have 20-25% of each day devoted to free time.
- Think outside the box for unique and memorable experiences that will take your retreat to the highest level! Use your imagination and ask the locals about some really interesting and off the beaten path adventures that you can take your group to experience. I have heard of some really fun experiences such as going behind the scenes of a pro tennis tournament, being extras in a movie or even visiting a portal to Lemuria!

Team, equipment, legal & insurance



Step 3 Team, equipment, legal and insurance

A) Hiring your Team

- **Should you hire an event/retreat coordinator?** Depending on the size of your retreat, and your budget, you might want to consider hiring a retreat coordinator to handle all the dealings with the hotel, meals, equipment, transportation and even tours, so you can be free to be 100% focused on delivering the content and leading the retreat and being fully present for your participants.
- **Would you like to have a personal assistant before and during the retreat?** Even if you have a retreat coordinator, and especially if you do not, having a personal assistant to support you while on the retreat is a huge help to both you and your guests. Your assistant can handle any and all minor questions and challenges with all your logistics as well as help manage any problems that may come up for your participants, again allowing you to be fully present and focused on leading the retreat to the best of your ability.
- **Someone to handle all your social media.** During promotion of the retreat and even during the retreat, hiring someone to take over posting and answering questions on social media will take a huge chunk of work off of your plate.
- **A copywriter for all your promotional materials.** Hiring a copywriter to write or tweak your website, emails, flyers and social media ads will ensure that your copy is as appealing as possible to attract and fill your retreat with your ideal clients.
- **Local tour and transportation coordinator.** If you are unfamiliar with your location, it is best to work with a local tour and transportation coordinator to provide you with accurate information about what kind of activities and tours you can do easily. They will also be aware of traffic patterns and help you plan the timing of your schedule with no surprises.

Team, equipment, legal & insurance



Step 3 Team, equipment, legal and insurance

A) Hiring your Team

- Do you want a photographer and/or a videographer to document the retreat? It can be a really nice touch to hire a professional photographer and/or videographer to capture all the magical moments of joy and fun on the retreat. Include a CD or file with all of the retreat photos and videos to each participant. This allows your guests to enjoy the moments fully and not worry about messing with their camera or phone.
- Massage therapist or energy healer for sessions during the retreat. Think about hiring a masseuse or an energy healer to give individual sessions to each of your participants. They will be feel honored and never forget this very special gift you have given them.
- Will you need a foreign language translator? If you are in an international location you may need to hire a translator for the group to help out while ordering meals, talking with hotel staff, visiting local markets, etc.

B) Equipment

- Will you need a sound system for music, microphone and speakers? Think about all the equipment you might need to present your content and activities.
- Screen and projector. Are you planning on showing videos, movies or power point slides?
- Tables and chairs. Are the chairs in the venue comfortable? Are they right for the activities you have planned? Can they be easily moved for people to lay down during meditations? Will you need tables for people for support while writing?
- Decorations to match your retreat theme. Can you bring or do they have the decor that lines up perfectly with your theme and content?

Team, equipment, legal & insurance



Step 3 Team, equipment, legal and insurance

C) Legal and Insurance

- **Liability waivers.** Will you require your participants to sign a liability release so that if anything happens on the retreat, you are protected?
- **Contracts with venue, tour and transportation companies.** Hotels and retreat centers will generally have a contract for you to sign. Read it carefully and make sure you understand exactly what you are responsible for. Tour and transportation companies may or may not have a standard contract, but it is always a good idea, especially if it is a company you have never worked with before to protect all parties involved.
- **Manage expectations for your clients.** Be clear in your promotional materials to clearly explain all expectations of your clients. Never promise or even hint about something you may not be able to deliver. If there is something you are not sure about, better not to mention it and let it be a surprise bonus if it happens. It is always better to over deliver than give less than they were expecting.
- **Travel insurance for participants.** Many retreat leaders require their participants to purchase travel insurance so if something happens in their life that prevents them from attending, they will not ask for a refund from you as they will be reimbursed by their insurance.
- **Personal liability insurance.** It is important to be covered as the retreat leader, in the unlikely event of an accident, injury, sickness or worse for your participants or you.

Congratulations!



Congratulations!

I wish you the best success possible on creating your transformational retreats. Have fun and stay in your heart and all will go well for you.

If you would like to learn more about being a guest retreat leader and bringing your group on one of my 'Done-for-you' Whale and Dolphin Wisdom Retreats contact me at

Anne@WhaleWisdomRetreats.com

or through



WhaleandDolphinWisdomRetreats.com



To your successful retreats!

Dolphin and Whale Blessings

Anne Gordon



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