

Virtual Retreat Planning Guide



A workbook to guide you to easily create a transformational Virtual Retreat for your clients.

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Virtual Retreat Planning Guide

In this planning guide you will...

- Set the vision and goal for your Virtual Retreat
- Decide on the perfect timeline.
- Choose the technology you will need.
- Select the ideal content delivery method.
- Know how to find the perfect price.
- Identify fun and engaging activities.
- Create a supply list for your participants.
- Make a fabulous schedule.
- and so much more...



Virtual Retreat Planning Guide

The perfect template to create, lead, fill and lead your virtual retreat.

Your Virtual Retreat Planning Guide will give you a clear template to follow to know how to plan, promote and prepare to lead your virtual retreat.

Follow it carefully and you are guaranteed to lead a successful and profitable virtual retreat that will make a deep impact on all of your participants.

The Idea Stage

Start by setting your retreat vision and brainstorm ideas about how you want your virtual retreat to be.

- Create the vision for your virtual retreat.

Sit down and visualize how your retreat will feel, the activities, content and who your ideal participants will be. This is crucial to set the tone for every step to follow. Keep coming back to your vision if you get stuck at any step along the way to leading your retreat. Write out your vision:

- Set the goals for your virtual retreat.

What are your goals for this retreat? Is your goal to make a profound impact for your participants? To share a powerful experience with your clients? To deepen your connection with your participants? To make a nice sum of money? All of the above? List your overall goals for your retreat:

- Set the goals for your retreat con't.

a. Goal for your participants.

What do you want your retreat participants to get out of attending your virtual retreat? What will they learn? What will be their take away after the retreat? What are the realizations you would like to see them have?

b. Goal for your business.

How do you want your virtual retreat to impact your business? Do you want to attract new clients through your retreat? Or deepen relationships with existing clients? Do you want to branch out and expand your services by offering virtual retreats? Do you want to add another source of income for your business?

c. Goal for you, professionally and personally.

What are your professional goals for this retreat? To step up your leadership skills? To uplevel yourself as a successful entrepreneur? To take your coaching skills to the next level with the level of intimacy that a virtual retreat provides?

- Determine the transformation you want your participants to take away from your virtual retreat.

What is the transformation you want for your retreat participants? What is the benefit they are looking for by joining your retreat? How can you change the life of your client by them attending this retreat?

The Idea Stage continued

- Identify your ideal virtual retreat participants.

One of the most important steps to filling your dream retreat is knowing exactly who are your ideal participants. Your ideal retreat participant may not be the same as your ideal coaching client. Identify exactly who they are.

Gender: _____

Profession or how they identify themselves, (i.e., moms, single, entrepreneurs, etc.): _____

Age range: _____

Income level: _____

Hobbies and interests: _____

Religion/Spiritual: _____

Where and how they live (big city, rural, apartment, home owner, etc.): _____

Create an avatar for your ideal virtual retreat participant.

Name (create a name for him/her) : _____

Write a short description or bio for your retreat participant avatar

Creating Your Virtual Retreat

- Pick the platform for your retreat.

Now that you have your vision and goals identified, you want to pick a platform to host your virtual retreat.

Here are several platforms that you can host your virtual retreat.

Zoom - Starts at \$14.99/month. Well known, reliable, up to 100 participants, up to 49 people on screen at same time. Breakout rooms Unlimited recording.

Blue Jeans - Starts at \$9.99/month, up to 50 participants, 5 hours of recording.

Hopin.to - Special offer \$49/lifetime. A true live event host gone virtual with a main stage room, reception room, vendor space and breakout rooms. Complete with registration and ability to sell tickets through their site.

There are new ones popping up all the time. A quick internet search will show you many options.

Creating Your Virtual Retreat

- Pick the platform for your virtual retreat con't.

Which software platform will you use for your virtual retreat?

- Decide on the activities for your virtual retreat.

A virtual retreat is more than just a stage for you to deliver pure content. Think of a live retreat and all the activities that are normally included. How can you take as many of those same activities and include them in a virtual retreat?

What activities will you include in your retreat? List them all below. Which ones align with the vision and goal of your retreat? Pick ones that your participants will enjoy and will support the theme of your retreat.

[Click here for a list of activity ideas for virtual retreats](#)

Activities

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- Team and support staff.

Will you have an assistant, event planner or other team members to support you in leading your virtual retreat? How about before the retreat, will you have a VA or someone to help you with emails, organizing, website design or enrollment?

For example, I like to have an assistant that can handle setting up the breakout rooms for partner shares and lead movement exercises. You may do it all yourself if you prefer too.

List any team members you will use for your retreat:

Creating Your Virtual Retreat

- Equipment and supplies

What equipment and supplies will you need to prepare for your virtual retreat? Here is a list of some options you might want to utilize. Put a checkmark next to each one you will be using:

Powerpoint presentation _____

Whiteboard _____

Flip chart _____

Yoga mat _____

Exercise equipment _____

musical instruments _____

arts and crafts supplies _____

cooking utensils and ingredients _____

Other: _____

- Participant supply list

Make sure to create and send a list of supplies they will need, if any, to have to your participants ahead of time. For example; yoga mat, exercise clothes, art supplies, journal, drum, etc.

Make a list of the supplies that your participants should have for your virtual retreat:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Creating Your Virtual Retreat

- Create a budget and set the price.

Now that you have finalized all of the expenses of your retreat, create your budget in a spreadsheet and then set your price including a profit margin. The beauty of a virtual retreat is that there are very few expenses besides your platform, supplies and your time compared to a live retreat.

Here are some price suggestions depending on how long your virtual retreat is...

4-6 hours in one day - \$97-\$197

2-3 days - \$297-\$497

4+ days - \$997-\$1,997

Will you be making an offer for a live retreat or other higher end offer at your virtual retreat? If so, you might consider charging less for the virtual retreat or letting the amount they paid for the virtual retreat apply towards the price of your live retreat or other higher cost program or service.

What will be the price per person for your retreat? _____

- Set the timeline for your virtual retreat.

How much time do you want for your virtual retreat?

Here are several options:

1. One day virtual retreat
 - a. Two 3 hour sessions (Total 6 hours)
 - b. three 2 hour sessions (Total 6 hours)
2. Two - three days
 - a. 6 hour days
 - b. 2-4 hours each day
3. 4+ days
 - a. 2-4 hours each day
 - b. 6 hour days

The above are suggestions, obviously you can choose the best timeline for your audience.

What will be the timeline for your virtual retreat?

Creating Your Virtual Retreat

- Set the schedule.

Create a schedule for your virtual retreat.

Here is an example for a one day virtual retreat:

9:00-9:15 am Welcome, presenter introduction and intentions

9:15-9:20 am Movement exercise

9:20-9:50 am Participant introductions and intentions

9:50-10:35 am Content presentation

10:35-10:45 am Guided visualization

10:45-11:05 am Partner shares

11:05-11:45 am Demo and do activity

11:45 am-12:00 pm Session 1 wrap up and Q&A

12:00-1:30 pm lunch break

1:30-1:40 pm Welcome back and recap morning

1:40-1:45 pm Movement exercise

1:45-2:30 pm Improv play activity

1:40-2:10 pm Content presentation

2:10-2:30 pm Partner shares

2:30-3:00 pm Wrap up content and make upsell offer

3:00-3:30 pm Q&A

3:30-4:00 pm Create future vision/plan

4:00-4:25 pm Group sharing circle and takeaways

4:25-4:30 pm Goodbye and gratitude

Create your virtual retreat schedule:

This image shows a blank sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Creating Your Virtual Retreat

- Build a webpage with payment options.

Your virtual retreat will need a website presence/sales page that you can refer your potential participants to so they can see all the details, itinerary, dates and price. You can have a dedicated retreat page on your business website or you can build a stand alone website for your retreat.

Will you have a webpage on your business site or a stand alone website for your retreat?

- Decide how you will take payments.

You can set yourself up with PayPal, and/or get a merchant account to take credit cards, such as Stripe or WePay. An easy way is to set it up on Eventbrite or MeetUp even have people mail in checks.

Which method will you use?

Promoting Your Virtual Retreat

- Announce your virtual retreat to the world and open enrollment.

Woo Hoo! You have everything in place now to announce your website to the world!

- Create a marketing plan to promote and fill your virtual retreat.

You are only limited by your imagination in how you will spread the word to fill your retreat. Below is a list of possible ways for you to attract your ideal virtual retreat participants.

	Yes/no	Date
1. Email to your existing email list	_____	_____
2. Public speaking	_____	_____
3. Facebook Lives	_____	_____
4. Instagram	_____	_____
5. YouTube	_____	_____
6. Blogs (Yours &/or guest blogging)	_____	_____
7. Podcast (Yours &/or guest interviews)	_____	_____
8. Radio & internet radio interviews	_____	_____
9. Magazine articles & interviews	_____	_____
10. Meetup groups (Yours &/or other people's)	_____	_____
11. Webinar	_____	_____

Promoting Your Virtual Retreat

- Create a marketing plan to promote and fill your retreat, con't.

1. **JV & referral partners** _____
2. **List on retreat websites** _____
3. **Facebook ads** _____
4. **Magazine ads** _____
16. **Other paid advertising** _____

Filling Your Virtual Retreat

- Decide on how many people you want to have on your virtual retreat.

If one of your goals of your virtual retreat is to create community, then you should limit the number of people who attend your retreat. A good rule of thumb - Keep the size of your virtual retreat the same size as your live retreat, or not have more people than you can see all on the same page of your platform, such as Zoom. If you have too many people it will be harder to create an intimate feel of community.

How many people would you like for your virtual retreat?

Finalizing your Virtual Retreat Details

- Confirm your Virtual Retreat platform and make any necessary payments.
Make sure your chosen platform is set up for your Virtual Retreat.

Do they need a password to enter the 'room'? _____

Are you up to date on your payments? _____

- Have you sent out a supply list to your participants?

- Confirm any guest speakers, assistants or team members you may be using.

Finalizing your Virtual Retreat Details

- Make sure you have any equipment or supplies ready needed for your virtual retreat, i.e., microphone, white board, music, etc.

Make a list of all the equipment you will need for your retreat and note if you have it ready to go or if you still have to get it. Make a check mark if you have confirmed it.

Equipment	Have it/Have to get it	Confirmed

Preparing to Lead Your Virtual Retreat

- Create a waiting list of interested participants in case of any cancellations or for your next retreat.

If your retreat is sold out, create a waiting list of anyone who has expressed interest in your retreat in case there are any last minute cancellations and there are people you can contact when you announce your next retreat.

Name of person	email	phone

Preparing to Lead Your Virtual Retreat

- Prepare any handout materials you may have.
Get all of your handouts and materials prepared and uploaded into Google Drive or Dropbox with the link handy to share during the retreat

Date

Handouts prepared

- Make sure your participants have everything they need and questions answered.
Check in with all of your participants to make sure they are all set to go on your retreat and see if there are any last minute questions.

Check in date

Final check in

- Tune back in to your vision and goals, refocus on why you wanted to lead the retreat.
Take a moment to get quiet and tune back into the original vision you had for your retreat. See how it feels now that it is almost ready to happen. See if you receive any new insights for your retreat.
Reflect on what you saw and felt when you tuned back into your retreat vision.

You Are Almost There!

- Keep breathing and channel your excitement into productive time management the last few days before your virtual retreat.
By now you should have almost everything ready to go for your retreat. It is important to take care of yourself and stay focused on your goal of providing a deep transformational experience on your retreat.
Reflect on your thoughts and feelings only a few days away from leading your retreat. Honor and acknowledge any fears and doubts that may come up and let them go, because YOU GOT THIS!

Here You Go!

- Final check to make sure you are ready to lead your Virtual Retreat.
Do a final check to make sure you have not forgotten anything you will need on your retreat.

Final check:

- Prepare yourself to lead your Virtual Retreat.
Woo Hoo! The day you have been dreaming of and planning is finally here. Take a deep breath, do a final visualization or do your power pose and away you go! Let the magic begin!

Reflect on how it feels to be ready to lead your virtual retreat.

- Welcome your participants!
How exciting! It is time to meet and welcome each of your virtual retreat participants. Take a deep breath and remember that they are excited and may be nervous, unsure as they come online. Your job is to set the tone for the retreat.

What qualities and ways of being will you embody as you meet your participants. Examples, confident, excited, grateful, open, calm, etc.

List the qualities you will emulate:

- Begin your virtual retreat!
Keep breathing. The day you have been so anxiously waiting for is here. Time to dive in and open the door to powerful transformation for your participants.

Write yourself some reminders of your retreat goal, vision and results you want to see during the retreat.

During your Virtual Retreat – Stay in the Moment

- Have fun and enjoy the retreat. Remember, you set the tone for everyone else.
Remember to relax, play, laugh and enjoy the retreat alongside your participants. Don't overthink or worry about what is going to happen. Trust, breathe and enjoy.
List some ways to remind yourself to have fun and enjoy the retreat.

- Go with the flow of the retreat, allow and embrace the unexpected.
Stuff happens and it is often completely out of your control. Technical glitches, delays, power outages, etc. Don't resist it. Use them to think out of the box to create an even more powerful experience than you had planned for your clients. Have some extra activities in your back pocket that you can pull out if something unexpected disrupts your plans.
Make a list of some extra activities you can offer if something changes your retreat plans.

- Allow for play and spontaneity.
Don't be afraid to get silly, laugh out loud, sing and play on your retreat. If you let yourself play, then you are giving permission to all of your participants to play, laugh and get silly too.
Reflect on how you feel when you allow yourself to get silly, laugh and play.

- Trust your heart. Do not listen to self-doubt or fears.
It is perfectly normal for your doubts, worries and fears to pop up during your retreat. Acknowledge them, thank them for sharing, but do not buy into them. Do not waste any time on them at all. Keep focused on your participants and the fact that they believed in you enough to come on your retreat.

List some methods to release and move past any doubts, concerns or fears that come up.

During the Retreat – Stay in the Moment

- Practice self-care to stay rested and energized.
While on your retreat it is important to take care of yourself and keep your energy high and on when you need to be. Practicing self care and giving yourself time to relax and rejuvenate is critical while you are leading your retreat.

List the methods you will use to take care of yourself. Examples, while your assistant is leading breakout groups or on breaks you can meditate, take a nap, listen to music, take a walk in nature, etc.

Celebration – Celebrate Your Success!

- Do something nice for yourself to celebrate the success of your retreat. i.e., take a rest or play day after the retreat, get a massage, have a spa day. Buy yourself something nice.

Jot down some ideas of ways you will celebrate after your successful retreat.

- Honor yourself for all of your hard work.

What are some ways that you can honor yourself for successfully leading your retreat? For example, adding 'Retreat Leader' to your bio and signature. Sharing in peer groups in person or online about your accomplishment. Posting a screenshot of your virtual retreat participants and you in your office.

List some ways you can honor yourself for completing your successful retreat.

Celebration – Celebrate Your Success!

- Show gratitude to your team, associates and your participants.
What are some ways you can show your gratitude to those who supported you in leading your retreat? Buy your team and JV partners a little gift. Print out the group photo and send to your participants. Take your team to dinner.

List some ideas of how you can show your gratitude to all those who made your retreat possible.

After the Retreat – Follow Up

- Collect testimonials after the retreat.
One of the best ways to entice people to your next virtual retreat is for them to see testimonials from your last retreat. The best time to get these testimonials is the day or two after the retreat when they are excited and still in the glow of the retreat energy.

Will you ask your retreat participants for a testimonial? If so, will they be video or written?

- Send out post retreat content and replay videos to keep the magic of the retreat flowing.

How will you keep the energy of your retreat flowing for your participants? List some ways below.

After the Retreat – Follow Up

- Offer upsell or ongoing support to your participants.

Will you be offering a live retreat, membership group, mastermind or 1-on-1 coaching or maybe a VIP day to your virtual retreat participants at the end of the retreat?

Think about what you could offer to your participants that would continue to support the transformation they just experienced on your retreat.

- Stay connected as a group.

Creating a Facebook group just for your virtual retreat participants is a great way for you all to stay connected after the retreat. You can also hold follow up Zoom calls on a quarterly or monthly basis.

Think of some ways you can support your participants to stay connected to each other and to the energy of the retreat.

- Send out a participant feedback survey.

One of the best ways to get honest feedback from your participants about your retreat is to send them out an anonymous survey. This information can be very helpful to you in planning your next retreat. Survey Monkey is a great website where you can create a free 10 question survey.

Will you send out a survey? _____

Here are some sample survey questions:

What did you gain/learn on this retreat?

What did you experience and take away on this retreat that you could not get otherwise?

What did you like most about the retreat?

Is there anything you would have liked to see, do or experience differently on the retreat?

What did you like most about your retreat leader?

Would you attend another retreat with the retreat leader?

Were your expectations for the retreat met? If not, why not?

Is there anything that you did not like about the retreat or retreat leader?

What was your biggest benefit from coming on this retreat?

What would you tell somebody who is thinking about going on this retreat? Why should they go?

Is there anything else you would like to share about your experience on this retreat?

After the Retreat – Follow Up

- Send out a participant feedback survey.

List some of your own questions.

- Start planning your next retreat!

When and what will your next retreat be about?

Start writing out your ideas for your next retreat!



Created by **Anne Gordon**

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Book a free Dream Retreat Creation session with Anne!

Get her feedback about your retreat ideas and ask her questions about how to make your retreat irresistible to your ideal participants.

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