

*Amy Yamada's*

**RETREAT**

**PLANNING**

**WORKSHEET**

A STEP-BY-STEP GUIDE TO HELP YOU  
PLAN AND FILL YOUR RETREAT

## STEP 1

### COMMIT TO YOUR RETREAT DATES

MY RETREAT DATES:

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## STEP 2

### COMMIT TO YOUR ENROLLMENT TIMEFRAME

(meaning the start and end dates for promoting and selling/filling your retreat with your ideal clients), which should be three months (or more) prior to your retreat, providing ample time for people to make their travel arrangements.

MY ENROLLMENT  
TIMEFRAME DATES:

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## STEP 3

### RESEARCH VENUES FOR YOUR RETREATS

Will it be in a hotel, AirBnb, a retreat center, someone's home, or elsewhere?

## STEP 4

### DECIDE IF YOU ARE GOING TO BOOK YOUR VENUE BEFORE OR AFTER YOU BEGIN SELLING INTO IT AND COMMIT TO BOOKING IT BY A SPECIFIC DEADLINE

This is dependent upon your "risk factor". If you are a low risk taker, you may want to book your venue once you have some cash flow coming in to go towards your venue and have peace of mind that you have the money to pay for it from your retreat attendees. However, you don't want to wait too long to book it - as it may no longer be available by the time you are ready to make your reservation. If you are a higher risk taker, book your venue and be 1000% committed to filling your retreat! As a high risk taker, I book my venues at least three months in advance. If I were a low risk-taker, I would still reserve my venue two months in advance - and make sure I've successfully enrolled several retreat clients into the retreat before making my reservation.

I am committed to booking my venue \_\_\_\_\_ (before or after) I begin selling into it. I am committed to booking it by \_\_\_\_\_(insert date).

## STEP 5      CREATE AN OUTLINE OF YOUR RETREAT PACKAGE

(This will include the title of your retreat, what the benefits of your retreat are for the attendee, what each attendee will receive, and what the investment is. This can be used as your “cheat sheet” for when you are talking about your retreat on enrollment calls, webinars, etc. Will there be any group coaching calls before or after the retreat? Will they also have access to a Facebook group page?) You can jot down some notes below of these bullet points.

**RETREAT TITLE:** \_\_\_\_\_

**HERE ARE THE BENEFITS (WHAT IS YOUR “BIG PROMISE” OR WHAT THEY WILL WALK AWAY WITH?):**

**Here’s what you will receive as a retreat attendee** (will they receive group coaching calls before/after the retreat, are accommodations and/or meals included, how many days of training/transformational experiences, a Facebook group page, etc.):

**Here’s what the investment is:**

**Option A)** One single payment (for best value): \_\_\_\_\_

**Option B)** Payment plan (i.e. a down payment plus two monthly payments, or three payments of “X” -

but just give one payment plan so the only options they have are to pay with one single payment or choose the payment plan. OR, you can decide to only offer a single payment option): \_\_\_\_\_

## STEP 6

### MAP OUT YOUR PROMOTIONAL PLAN

(i.e. Emailing your e-mail list to generate enrolment calls, hosting free webinars/ Zoom calls, FB lives, running an online challenge, speaking on stages, running FB ads to an online funnel, etc. Jot down some ideas below.)

## STEP 7

### CREATE A PLAN FOR YOU OR YOUR TEAM TO PRODUCE ANY WEB PAGES FOR YOUR PROMOTIONAL PLAN

(i.e. opt-in pages, thank you pages, a sales web page, order forms, etc. Jot down a few notes below of what types of web pages you or your team will produce.)

## STEP 8

### SCHEDULE TIME FOR INBOUND AND OUTBOUND ENROLLMENT (SALES) CONVERSATIONS FOR YOU AND/OR YOUR SALES TEAM

Meaning, inbound calls are those that people may schedule with you if you have inbound as a part of your promotional plan, and outbound calls represent you “smiling and dialing” - and reaching out to people you believe will benefit from your retreat.

## STEP 9

### HAVE A THOROUGH ONBOARDING AND FULFILLMENT PROCESS

Once someone says, “yes”, be sure to have a proper contract, credit card processing, a “Welcome Email,” a web page or document with all the information on the retreat (plus any group coaching calls before and/or after the retreat).

As the retreat gets closer, either you or a team member should call your retreat attendees to review the travel and retreat details and answer any questions. It’s a great idea to create an “FAQ’s” list as you begin receiving frequently asked questions - and then create an FAQ’s webpage.

## **STEP 10**      **PURCHASE EVENT INSURANCE FOR YOUR RETREAT**

I use [www.eventhelper.com](http://www.eventhelper.com) to purchase event insurance.

## **STEP 11**      **HAVE YOUR RETREAT ATTENDEES SIGN WAIVERS FOR YOUR RETREAT**

## **STEP 12**      **MAP OUT YOUR RETREAT ITINERARY**

What is happening each day? Are you including meals, activities, accommodations, guest trainers/ speakers/ co-hosts? Jot down ideas.

## DAY 1

## DAY 2

## DAY 3



## STEP 13

### CREATE A BUDGETING SPREADSHEET FOR ALL OF THE HARD COSTS

Venue, accommodations, travel, food, guest gifts, event supplies, staff, etc.

## STEP 14

### BE SURE TO HAVE PROPER SUPPORT AT YOUR RETREAT

Who are your team members and what are their roles?

## STEP 15

### DECIDE IF YOU ARE GOING TO MAKE AN OFFER AT YOUR RETREAT, AND IF SO, WHAT IS IT?

i.e. Upselling your attendees into a next step with you, such as private coaching, a longer term group coaching program, offering an ongoing service, etc.

## **STEP 16**

### **CREATE AND/OR ORDER ANY CUSTOMIZED MATERIALS NEEDED FOR YOUR RETREAT**

i.e. nametags, lanyards, worksheets, workbooks, journals, notepads, pens, menus, Order Forms for your upsell offer, etc.

## **STEP 17**

### **HAVE FUN!**

Retreats can be one of the most magical, transformational experiences you and your attendees can have

## **STEP 18**

### **BOOK A CALL IF YOU HAVE QUESTIONS ON THE ABOVE STEPS.**

Email me at [info@AmyYamada.com](mailto:info@AmyYamada.com)  
with the subject line “RETREAT”  
and your name and phone number -  
and let's chat!