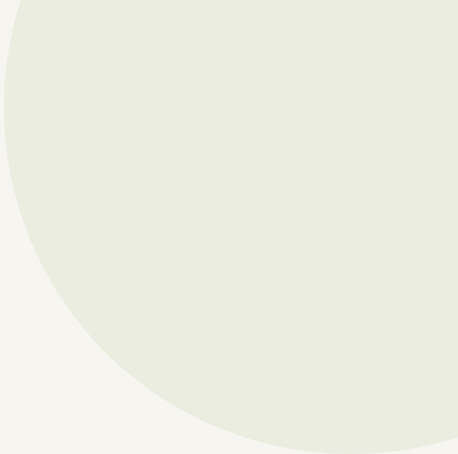




SUSTAINABLE GROWTH CONSULTING & COACHING, LLC

The Retreat Starter Plan

The five decisions to make before you book a venue, set a price, or announce a date. A short, practical planner for therapists and business owners creating their first retreat.

Created by **Arilda Surridge & Alex Sandev**

Start with decisions, not logistics

There is much more to creating a retreat than choosing a destination and putting together an itinerary. A successful retreat needs a clear purpose, the right participants, honest numbers, and a plan you can actually deliver.

This starter plan walks you through the five decisions that determine whether a retreat works, before you spend money on any of it. Work through the pages in order. Use estimates where you do not have exact numbers yet, and mark what still needs to be validated.

The sustainable growth question: if this retreat works, will it make your business stronger, or simply make it busier?

The five decisions

- ☐ 1. **Success**, what this retreat needs to accomplish for participants, the business, and you
- ☐ 2. **Concept**, who it is for, why it exists, and why now
- ☐ 3. **Outcome**, the change participants leave with
- ☐ 4. **The numbers**, whether the retreat can actually make money
- ☐ 5. **The next step**, what to validate before you commit

DECISION 1

Define what success means

Before planning any details, decide what a successful retreat needs to accomplish. Not just financially. A retreat that makes money but exhausts you is not a success you will want to repeat.

What would make this retreat feel genuinely successful to you?

What are you not willing to sacrifice to make this retreat happen?

What does the business need from this retreat? (profit, new clients, positioning, an offer you can repeat...)

DECISION 2

Clarify the concept

A strong retreat begins with a clear concept: who it is for, why it exists, and why now. Fill in your snapshot, with estimates where needed.

TARGET RETREAT DATE

LOCATION / VENUE STATUS

TARGET PARTICIPANTS

RETREAT LENGTH

TARGET PRICE / PERSON

What is already decided or known about this retreat?

What makes this retreat different from what already exists?

What feels uncertain or overly dependent on you right now?

DECISION 3

Define the participant outcome

People do not travel and pay for an itinerary. They pay for a change: an insight, a connection, a result. Define the outcome, and every other decision (venue, agenda, price) becomes easier.

Complete this sentence. It becomes the anchor for the whole retreat.

By the end of this retreat, participants will move from _____ to _____ through _____.

If the retreat succeeds, what will participants think, feel, know, or be able to do differently?

Who, specifically, is this retreat designed for? (The more specific, the easier it is to position, price, and fill.)

DECISION 4

Test the numbers

A retreat can sell out and still not make the money you thought it would. Run this simple model before you commit to any major expense.

Attendees × Price = Gross revenue | Gross - Costs = Profit

EXPECTED ATTENDEES	PRICE PER ATTENDEE	GROSS REVENUE
VENUE + MEALS	OTHER COSTS	ESTIMATED PROFIT

Break-even check: divide your total costs by your price per attendee. That is the minimum number of registrations before you make a single dollar. If that number makes you uncomfortable, adjust the price, the costs, or the format now, not after you have signed a venue contract.

Which expenses might you be underestimating? (travel, transfers, materials, fees, your own time...)

Which assumption has the biggest effect on whether this retreat is financially viable?

Want the math done for you? Use our free Retreat Profit Calculator at sustainablegrowthconsultingcoaching.com/resources

DECISION 5

Decide what to validate next

You do not need every answer before moving forward. You need to know which answers matter most. Check what still needs validation before you commit real money:

- ☐ Real demand: have actual people said they would pay this price for this retreat?
- ☐ The venue numbers: real quotes, not estimates from a website
- ☐ Your audience: is your current list or network big enough to fill it?
- ☐ The timeline: is there enough runway to market and fill the retreat?
- ☐ Your capacity: can you plan and deliver this without burning out?

The three things I need to validate before committing:

My next single step, and by when:

A note on where you are: whether you are at the idea stage, halfway through planning, or have hosted retreats that did not go the way you hoped, this is the work that changes the result. You do not have to figure it out alone.

This is the starter version. The full plan goes much deeper.

The complete Retreat Creation & Planning Workbook covers all 18 parts of building a retreat: the full economics model, offer design, participant journey, logistics, team, budget scenarios, risk planning, launch timeline, and enrollment tracking.

It is included when you work with us, in the Retreat Strategy Intensive, the 90-Day Retreat Creation & Launch package, and the Retreat Creator Course.

See how we can help

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