

Tips for planning a successful  
Retreat

A circular logo with a yellow-orange background. The text "Sweet Lemonade" is curved along the top inner edge, and "Adventure Club" is curved along the bottom inner edge. In the center is a stylized illustration of a lemon slice with a wheel-like pattern. Two small stars are positioned on either side of the word "Retreat".

# Retreat

Planning Guide

**Sweet Lemonade Adventure Club**

Heather Wanninger  
[heather@sweetlemonadephotography.com](mailto:heather@sweetlemonadephotography.com)

# About Us



Sweet Lemonade Adventure Club is all about creating experiences and transformations through retreats and trips that are filled with fun, adventure, and intentional white space for personal discovery and business ideas to amplify joy, peace and freedom of all attendees.

If the idea of generating over \$100k in one event is appealing, consider retreats as another revenue stream for your business. Heather and her team can also help take care of all the planning for your next retreat so hosting a retreat is effortless for you and unforgettable for your participants.

# Rejuvenation & Revenue With Retreats

## HEATHER WANNINGER



Heather is co-founder and Chief Experience Curator for Abundance Worldwide and facilitates a variety of intensives, retreats, and adventures for high-performing leaders and coaches around the world.

Heather recently founded Sweet Lemonade Adventure Club to continue her mission to help reveal more joy, peace, and freedom in the lives of those around her.

Heather is passionate about creating experiences that lead to true transformation - away from the computer and day to day life.

She teaches the power of fulfilling bucket-list adventures that create lifelong memories and pivotal performance shifts.

This guide will help you learn how to plan retreats for your own audience that creates leads for life.

# The 6 W's

When deciding to host a retreat,  
you first need to determine...

Who

What

When

Where

Why

Wow



# WHO

## Who Is Your Ideal Attendee?

Most who are choosing to host a retreat already have a client base and utilize retreats to build stronger relationships with current clients and create another revenue stream so the typical things like demographic and psychographics are already known. WHO is your ideal retreat client?

Of all the clients you've worked with, what clients do you feel would most benefit from an in-person retreat? Write down the names of those clients.

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Of all the clients you've worked with, who have been your favorite clients to work with? Write down the names of those clients.

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Of all the clients you've worked with, who have had the greatest results working with you? Write down the names of those clients.

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Of all the clients you've worked with, who have invested the most to work with you? Write down the names of those clients.

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After you go through the rest of the 5 W's, you'll use this list to determine your ideal attendees for the retreat you are planning.



# WHAT

## Type of Retreat

There are a wide variety of retreats, you can host. Creating clarity around WHAT type of retreat you want to host will help you invite the right WHO.

What kind of retreat do you want to host? Personal development, business focused, fun, health, spiritual, etc?

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Based on the type of retreat you want to host, what type of activities best support your goals? (Workshop style trainings, time in nature, reflective time, relaxation, fun activities, etc)

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If you plan to incorporate structured education, who is leading the trainings? Is it mastermind based and all attendees doing an education components? Will you bring in other experts?

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How will participants engage and learn from one another? 1:1 scheduled opportunities, group time, informal networking?

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# WHEN

## When will you host the retreat?

Overall, the best time to host a retreat is the best time that works for YOU. And then you can plan what areas you should consider based on the time that works best for you.

When is the best time for YOU to host a retreat? Think about how a retreat fits into your other offerings, campaigns in business as well as personal activities. I.E. If you bring in your clients through challenges (which can be time and energy intensive, do not plan a retreat right before or after). Looking at your business and personal calendar, is there a specific month that is best for you?

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If you find there are a variety of times throughout the year, you can host a retreat, consider what season is best for you to host based on the activities you want to incorporate?

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Retreats can be any length you desire however most will be between 1-10 days. International retreats will be longer than local retreats. I find the sweet spot for domestic retreat is 4 days/3 nights and my international retreats are usually 5-12 days. How long do you want your retreat to be?

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# WHERE

## Where will you host the retreat?

Whether you choose to host a retreat in your backyard or overseas, retreats can be a fun, transformational and profitable.

You get to decide WHERE you want to host your retreat?

Where would you like to host your retreat? Your backyard? Domestic destination? International locale?

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Based on the transformation you want your attendees to have is there an environment better suited for your retreat? Quiet and serene or endless options of fun?

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Are you inviting speakers/experts to present? If so who would be on your list to present or co-host an event? (Choosing a location convenient to fly in/out of can be critical. For those in demand, making it as easy as possible for them to say yes is important as often they will not stay the duration of the event.)

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What kind of accommodations do you want to provide? Simple and rustic? Bougie and over the top?

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# WHY

## What is the purpose?

Clearly define why your ideal attendee should attend and what problems will be solved by them attending.

Why are you hosting this retreat? What is the purpose?

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What benefits will your attendees gain, what problems solved and symptoms eliminated by joining you at this retreat? Do you want to make a retreat part of your client's journey through your offerings?

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How does your retreat differ from others? What makes them saying yes to your retreat valuable to them and a no-brainer to say heck yes!

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Are you making a back-end offer at this retreat? If so, what is it? (i.e. Yearlong mastermind for \$50k)

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# WOW

## The Wow Factor

The surprise and delight is one of the most fun and unexpected things I like to incorporate into the budget. How will you add wow factor?

What type of gifts would coordinate with your location of your retreat? (i.e. custom beach towel or insulated tumbler for beach locations)

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What type of gifts would be helpful during the event or create a connection with the results you want them to achieve? (i.e. Rocketbook- digital notebook for taking notes at retreat, copy of your own book that correlates to retreat topic, branded yoga mat or set of fitness bands if it's a health retreat.

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Are there additional activities/speakers/meals you could include that is not advertised for your retreat?

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Anything that is totally just for fun that you love to show appreciation for them attending?

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# How much revenue do you create in your coaching biz when you spend 40 hours staying in your zone of genius?



Whatever number you calculated... that is how much revenue you are leaving on the table planning your own retreat because on average, it takes 40 hours to take care of all the details of an in-person retreat... before you even greet your guests.

If you love the idea of hosting a retreat, and want to focus on what you do best (coaching) and not create another full-time job by putting on new travel agent and retreat planning hats, let's connect.

We can do what we do best.. which is take care of all the logistics for you so you can show up to your retreat putting all your energy into serving your attendees powerfully.

Schedule a call to chat to discuss how we can help you plan your next retreat.