



nOMad's Retreat Planner Checklist

Step-By-Step Guide to Building Your
Transformational Retreat

Welcome!

So you're thinking of making the leap to build your own retreat... That's great!
You've taken a huge step by just downloading our **nOMad's checklist**.

In this checklist, we'll walk through the steps of developing your own
Transformational Retreat. We've broken it up into Milestones so you are
organized & supported in your process every step of the way!

We suggest to begin planning at least 8-12 months out preferred.

Milestones 1-4: Phase 1.	Launch your retreat in 30 days! Week One- Tap into Vision & Find a venue/ Sign contract. Week Two- Set up Budget & Pricing Week Three- Set Up Registration System & Sales Page Week Four- Marketing Strategy
Milestones 4-5: Phase 2.	Execute from launch until retreat is sold out. 3-6 months for local retreat, 6-9 months domestic retreat, 9-12+ months for international retreat
Milestones 6-7: Phase 3.	Execution time of retreat to post retreat

Milestone 1: Creating the Vision, Finding & Securing a Venue + Contract

Choosing the right venue is foundational. It sets the tone, supports the transformation, and impacts your budget and marketing. This is where vision meets logistics.

- Clarify your retreat vision: size, vibe, location, amenities.
- Research and contact potential venues (3–5 options minimum) and check with nOMad properties to find a possible match
- Ask the right questions: cancellation policy, what's included, payment schedule.
- Secure your dates and sign a clear contract.
- Begin a shared document or calendar with deadlines.

Milestone 2: Budgeting & Pricing for Profit

Creating a retreat is not just about the magic — it's a business. This step ensures you're pricing with confidence and not burning out or just breaking even.

- Map out ALL expenses (venue, food, travel, support team, materials, etc.).
- Decide on your compensation: How much do you want to earn?
- Build in a buffer for unexpected costs (10–20%).
- Choose a pricing model (tiered, early bird, payment plans).
- Set a minimum number of attendees to break even + ideal profit number.

Milestone 3: Registration System & On-boarding

Your systems should create trust and ease — both for you and your participants. This step sets up your back-end and ensures a smooth client journey.

- Choose your registration platform (Simplero, Squarespace, Google Form, etc.).
- Create a clear registration + payment process.
- Gather all information for on-boarding details (flight info, cell service, food, etc)
- Write automated on-boarding emails with FAQs, travel info, and welcome packet, and Google form.
- Set up calendar reminders for payment plans or check-ins.
- Use a tracker to monitor sign-ups and progress.

Milestone 4: Marketing Strategy & Execution

Marketing isn't about shouting — it's about resonating. This step focuses on crafting your message and getting it in front of the right people.

- Define your ideal participant and core message
- Discover where you already shine
- Create a content calendar: storytelling, behind-the-scenes, testimonials.
- Choose your platforms: Instagram, email, partnerships, ads, etc.
- Write out a 4-6 week campaign plan. Review, tweak, and repeat until retreat is booked.
- Use video, reels, and authentic voice to build excitement and trust

Milestone 5: Sales System, Calls & Securing Spots

Selling is service. Whether through DM convos, emails, or calls, this step is about guiding people to a YES that's aligned and empowered.

- Clarify your sales process: application, consult call, direct link?
- Prepare a script or structure for calls (listen more than you speak).
- Know your goal and numbers. Review analytics.
- Follow up intentionally (use reminders and track conversations).
- Set up Affiliate Links for others to refer (past clients, colleagues, etc)

Milestone 6: Prepping the Retreat & Holding the Space

This is where the magic brews. From your schedule to your energy, this step ensures you're fully prepared to lead with presence and integrity.

- Finalize your daily flow and content.
- Prep materials, playlists, rituals, and team support.
- Schedule pre-retreat calls or group chats to build connections.
- Confirm all logistics with the venue and vendors.
- Purchase welcome gifts for clients
- Set personal boundaries and self-care rituals leading into the retreat.

Milestone 7: Integration, Post-Event & What's Next

Your retreat doesn't end when the last candle is blown out. This step ensures your people land softly and you sustain the momentum (and magic) with the option to continue working with you (upsells/renewals!)

- Send a heartfelt thank you + integration email within 72 hours.
- Offer a follow-up call, community group, or next step (membership, 1:1, next retreat).
- Gather testimonials while the experience is fresh.
- Reflect: What worked? What would you change?
- Plan your debrief and rest before jumping into the next thing



Want More Support In Creating The Retreat of Your Dreams?

Become a nOMad Guide & Join our New Leaders Membership!

WHAT'S INSIDE OUR NEW LEADERS MEMBERSHIP

Build Transformational Retreats

With Confidence, Clarity & Soulful Support

A yearlong container for emerging retreat leaders ready to move from vision to venue – and beyond.

What You'll Receive Inside the New Leaders Case Study Membership

The nOMad Path Retreat Planning Program 2.0

A step-by-step blueprint to move from idea to impact — support in venue selection,

budgeting, onboarding, sales, and more.

✔ **Weekly Live Mentoring Calls & Support**

Get real-time feedback, guidance, and accountability in live sessions with Phoebe and the nOMad team.

✔ **Private Community + Affiliate Program**

Connect, share wins, and refer others to this path with the opportunity to earn while you do.

Bonus Material:

✔ **Authentic Marketing Challenge**

Craft and share your message without burnout or fake hype — just real, aligned marketing that works.

✔ **True Voice Branding Program**

Own your voice, clarify your mission, and stand out without trying to fit into someone else's mold.

✔ **Access to Rituals, Templates & Retreat Planning Tools**

Designed to help you hold space powerfully and stay grounded in your leadership.

🔥 **Join Now & Lock in Your Special Case Study Membership Offer at \$997/year**

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