ELEVATE DESTINATIONS

Corporate Retreat Planning, Mapped Out

From first discovery call to lasting impact — here's the full journey.

Discovery	Design	Confirm	Develop	Manage	Reflect	Measure
6–12 mo.	5–9 mo.	3–6 mo.	3–1 mo.	Week of	After	6–12 mo. after

1 Discovery — Define the Retreat

6–12 MONTHS BEFORE

- Define the purpose & 1–2 outcomes
- Set budget & cost-per-person target
- Assign lead & core planning team
- Confirm attendees & headcount
- Lock key dates & retreat length
- Define what success looks like

2 Design — Build the Experience

5–9 MONTHS BEFORE

- Set destination & venue criteria
- Shortlist venues & activities
- Plan for accessibility & diet needs
- Weigh cost, safety, weather, access
- Blend work, wellness & free time
- Align activities to retreat goals

3 Confirm — Lock It In

3–6 MONTHS BEFORE

- Select the destination & venue
- Negotiate contracts & terms
- Confirm vendors & key partners
- Finalize dates, rooms & transport
- Lock the budget & contingency
- Set deadlines on master calendar

4 Develop the Agenda — Plan the Details

3 → 1 MONTHS BEFORE

- Build agenda around objectives
- Confirm facilitators & AV needs
- Collect travel & rooming info
- Send the attendee packing guide
- Balance meetings, meals & free time
- Finalize menus & dietary needs
- Arrange flights & transfers

5 Manage the Experience — Execute

WEEK OF THE RETREAT

- Build run of show & assign roles
- Monitor travel & weather
- Protect breaks & personal time
- Reconfirm vendors, transport & meals
- Keep contingency plans ready
- Centralize schedule updates

6 Reflect — Follow Through

AFTER THE RETREAT

- Thank attendees, share takeaways
- Gather attendee feedback
- Evaluate vendors & experience
- Distribute decisions & owners
- Reconcile budget vs. actual
- Document lessons learned

7. Keep measuring: Revisit outcomes at 6 months, 12 months, and through exit interviews to track the retreat's lasting impact.

Schedule a Discovery Call

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