FOR WHOEVER IS PLANNING IT

THE RETREAT BRIEF.

One page to get your CEO, your finance team and your planning partner on the same page before anyone books a thing. Fill it in, then bring it to the conversation.

01 THE GOAL

One sentence. What has to be different when the team comes home?

02 WHY NOW

What is happening in the business: a new leader, a reorg, fast growth, a big year, a new strategy?

03 THE FORMAT

Pick the closest fit. We will shape the rest around your goal.

☐ Team retreat ☐ Sales kickoff ☐ Executive offsite ☐ Recognition & reward
☐ Client renewal ☐ A day of Sessions

04 WHO IS COMING

Headcount, teams, and anyone who must be there.

05 WHEN

Ideal dates, and dates to avoid. Lead time: 3 to 6 months for up to 100 people, 6 to 12 for more.

06 BUDGET

A per-person range your leadership can live with, plus a 10 to 20% buffer for the unexpected.

Per person · Total, with buffer

07 WHAT SUCCESS LOOKS LIKE

Two or three signals you will check afterward. For example: decisions made in the room, a survey before and after, a 30-day check-in.

08 WHO DECIDES

Who sets the budget, who approves it, and who needs to be kept in the loop.

09 AFTER THE RETREAT

Who sends the recap within 48 hours, and when is the 30-day check-in?

FROM THE OFFICE

Bring this to your CEO with the goal first and the destination last. When leadership can see what success looks like, a retreat stops looking like a perk and starts looking like a plan. Send it our way and we will turn it into a first agenda.