



4 Stages of a Successful Retreat

1

Needs Assessment



This is the opportunity for leaders and team members to contribute to answering the key question for the retreat:

“What results would make this a worthwhile use of all our time?”

Key needs, priorities and goals can be articulated in this stage. A preliminary budget is also established.

2

Design



With regular client input, key retreat goals are integrated with proven processes to create a series of possible retreat designs that are then further refined until the client is satisfied with the final approach.

Once the design is agreed to, then human, material, budgetary and creative resources are marshaled to fulfill the vision.

3

Implementation



All details of the retreat now come into play. Logistics, participant pre-retreat packages, menu preparation, workbooks, presentation materials, activities etc are all readied for a successful retreat. Detailed checklists are shared with the client to ensure all elements are properly addressed. Participants arrive and the retreat is completed.

4

Evaluation

This stage answers the question asked in Stage 1. Participant feedback is key to this stage:

- Was this retreat a good use of our time and money?
- Did we achieve the results we wanted?
- How would we improve it?
- Would we do it again?