

The Corporate Retreat Planning Checklist

Every deadline, contract term and headcount question — in the order you'll actually hit them.

Most corporate retreats don't fail on the big decisions. They fail on the small ones that had a deadline nobody wrote down — the attrition clause in a room block, the AV quote that didn't include a technician, the final headcount that was due eleven days before anyone thought to ask.

This is the working checklist for a 15–100 person retreat. It's organized by when the decision is due rather than by topic, because that's the order the deadlines arrive in. Work it front to back and the retreat gets built in the background while you do your actual job.

Nothing here is tied to a particular resort, chain or destination. The terms named are the ones every group contract has, whoever you sign with.

How to use this

The timeline is 16 weeks, not 8. You can compress it — see the last page — but the two things that genuinely cannot be rushed are the venue contract and the group air. Everything else bends.

Three deadlines drive everything else

Write these on a calendar before you do anything else.

The room block attrition date. The day you can still shrink your block without paying for empty rooms. Usually 30–60 days out. Miss it and you pay for rooms nobody sleeps in.

The final headcount / guarantee date. Usually 7–14 days out. After this, catering bills you for the number you gave, not the number who ate.

The cancellation cliff. The date your deposit stops being refundable, or the sliding scale starts. Read this one before you sign, not before you cancel.

Assign an owner to every line. A checklist with no name next to an item is a wish. Two or three people can carry this; one person cannot, and the failure mode is always the same — the coordinator becomes the bottleneck in week 12.

16–12 weeks out — Foundation

Decide what the retreat is for — in one sentence.

Write it down and test every later decision against it. “Rebuild connection after a hard year” and “align leadership on the 2027 plan” produce different venues, different agendas and different budgets. A retreat with two goals usually delivers neither.

Set the total budget, all-in.

Include air, ground transfers, rooms, taxes and resort fees, meeting space, F&B, AV, activities, gratuities, shipping, and a contingency line of 10–15%. The two lines most often forgotten are **ground transfers** and **AV labor**.

Pick dates, and check them against three calendars.

Your company's crunch periods, the destination's peak season, and school holidays if a meaningful share of the group has kids. Mid-week arrivals are cheaper and easier to staff than weekend ones.

Lock the length.

Two to four days covers almost every case. A Thursday–Saturday pattern gets better attendance than Monday–Wednesday and better rates than Friday–Sunday.

Count the people, and the constraints.

Headcount, but also: how many need accessible rooms, how many are traveling internationally (visa and passport lead times), how many are remote-only and have never met anyone in person, and dietary

restrictions likely to be non-negotiable rather than preference.

Name the planning team.

Two to three people, with explicit lanes: one owns venue and contracts, one owns logistics and communication, one owns agenda and content. One person also needs to own the budget spreadsheet, and it should be a different person than the one negotiating.

Decide the hybrid question now, not later.

Will anyone participate remotely? If yes, it changes room selection (you need a room that can be miked), AV spend, and agenda design. If no, say so out loud early so nobody spends six weeks assuming otherwise.

12–9 weeks out — Venue and contracts

Shortlist 3–5 destinations, then 2–3 properties in each.

Filter on nonstop access from where most people live, total travel time door-to-door, cost of ground transfer from the airport, and whether the property has meeting space sized for your group rather than space they'll make work.

Call the group sales director. Do not use the website form.

Group rates are not published. Ask for the group room rate for your exact dates, whether resort fees are included or additive, meeting room configurations and capacities, F&B minimums, AV pricing (and whether it's in-house or an outside vendor), and what they'll comp at your size.

Ask every property the same seven questions

So the proposals come back comparable.

- 1 What is the group rate, and what does it exclude?
- 2 What is the F&B minimum, and does it count taxes and service charge toward the minimum?
- 3 What is the service charge and tax on F&B, stated as a percentage?
- 4 What is the attrition allowance — what percentage of the block can I release, and by when?
- 5 What is the cancellation schedule, by date?
- 6 Is AV in-house or contracted out, and can I bring my own vendor?
- 7 What comps apply at my room count — rooms, upgrades, meeting space, a welcome reception?

Read the contract for these five clauses before anything else.

Attrition. Cancellation. Force majeure. F&B minimum and what counts toward it. Whether the meeting space is guaranteed or “based on availability.” The last one is the sneakiest — space that isn’t named in the contract can be moved.

Sign the room block, then publish the booking link and the cutoff date the same day.

Every day between contract and announcement is a day of block you’re liable for and nobody has booked.

9–6 weeks out — Logistics and communication

Build one master timeline with dates and owners, and put it where the whole planning team can see it.

Every deadline in this checklist goes on it.

Open one channel and use only that channel. A Slack channel, a shared doc, or an email alias — one. The failure mode is questions arriving in four places and getting three different answers.

Collect from every attendee, with a hard deadline:

- Attendance confirmation
- Legal name exactly as it appears on their ID, for air
- Dietary restrictions and allergies, with severity noted
- Accessibility needs
- Room preference and any roommate pairing
- Arrival and departure constraints
- Shirt size, if there’s swag

Decide and announce the travel policy. Who books air — the company, a travel manager, or the individual with reimbursement? What’s the cap? What happens if someone wants to extend their stay personally? Answer these in writing once instead of forty times by email.

Book ground transfers. Airport-to-property for arrival waves, plus any off-site activity. This is the line item most often left to “we’ll sort it there,” and it’s the one that produces forty people standing outside an airport.

Confirm the AV order in writing, with a technician included. Screens, projection, microphones (count them — a panel needs more than you think), speakers, recording if you want it, and a live human present during sessions. Equipment without a technician is a room full of people watching someone crouch behind a laptop.

6–4 weeks out — Agenda and activities

Draft the run-of-show hour by hour, including meals, breaks and transitions. Transitions are where time disappears; budget 15 minutes to move a group of 40 anywhere.

Protect unstructured time deliberately. The most-cited value of a retreat is conversation that wasn't on the agenda. Schedule at least one long open block and defend it. Back-to-back sessions produce a group that is together for three days and connects for none of them.

Choose activities that pass three tests: they put people together who don't normally work together, they don't require athletic ability, and nobody can be visibly bad at them. Cooking classes, local history or food tours, volunteer projects and craft workshops clear all three. Competitive sports and anything with a leaderboard do not.

Plan the meals as part of the design, not the catering order. At least one full-group dinner. At least one meal in small mixed groups. Confirm the allergy protocol with the kitchen in writing — not “we'll accommodate,” but who is told and how the plate is marked. Decide the alcohol policy and make sure good non-alcoholic options exist, so abstaining isn't visible.

Brief speakers and facilitators. Timing, room setup, who the audience is, what happened at the company recently that they should or shouldn't reference, and the AV they'll have.

4–2 weeks out — Money and detail

Ticket the air. Build in connection buffers — two hours domestic, three international. Avoid return flights before 9am; a 6am departure erases the last evening of the retreat because everyone leaves early.

Hit the attrition date deliberately. Review actual bookings against the block *before* the release date and cut what you don't need. This is a calendar entry, not a task — it has one date and no grace period.

Deliver the final headcount and meal guarantees. Confirm room occupancy, adjust activity bookings, and get the revised banquet event orders back in writing.

Send the pre-retreat packet. One document containing:

- Full schedule with room names and times
- Property address and contact
- What to pack, and the dress code for each event
- Arrival logistics and transfer details
- WiFi and AV instructions
- Rooming assignments
- Dietary and accessibility confirmations
- An on-site emergency contact who is not the CEO

Reconcile the budget against contracted commitments while there's still time to move money.

2 weeks to day-of — Final checks

- Confirm every vendor contract and payment schedule, in writing
- Send the final reminder with schedule, packing note and travel details
- Prepare materials: name badges, agenda signage, directional signs, welcome packets
- Print a one-page emergency sheet: property contact, nearest urgent care, planning-team mobiles
- Confirm the AV technician by name and arrival time
- Have the coordinator arrive a day early and walk the space — room sets, sightlines, AV test, F&B timing

During the retreat

Walk the room before each session. Chairs, temperature, sightlines, water. Five minutes of prevention.

Expect one thing to go wrong and plan the slack. A speaker runs long, weather cancels the outdoor block, more people show for an optional activity than signed up. Keep the anchor moments intact and let everything around them flex.

Assign someone to photograph. Not the coordinator — they're busy. Photos become internal comms, recruiting material and the argument for next year's budget.

Watch the quiet people. The person standing at the edge of the group at the welcome reception is the reason retreats exist. Someone on the planning team should be tasked with noticing.

After the retreat

- Thank-you note to attendees within 48 hours, while it's still warm
- Post-retreat survey — five to seven questions, sent within a week, anonymous
- Photo recap to the whole company, including people who didn't attend
- Final invoice reconciliation against the contract, line by line, before you pay
- A written debrief: what worked, what you'd change, what the real per-head cost was

That last one is the single highest-value output of the whole process, and it is the one most often skipped.

If you only have 8 weeks

It's doable, and it's a different plan. What changes:

- **Cut the destination shortlist to two**, both with nonstop access. Distance is the first thing to trade away.
- **Take a shorter block with a tighter attrition allowance** rather than negotiating for weeks. Speed costs flexibility.
- **Accept in-house AV.** Bidding it out is where compressed timelines break.

- **Set the headcount deadline at week 4, not week 12,** and mean it.
- **Book air as a group through one channel.** Individual booking at 8 weeks produces forty different itineraries and no leverage.

What does not change

The attrition date, the guarantee date and the cancellation cliff still exist. They arrive proportionally sooner.

A note on when to bring in help

A retreat this size is roughly forty hours of coordination spread across four months, and most of it lands on someone whose actual job is something else. A group travel specialist handles venue sourcing, contract negotiation, the room block, group air and vendor coordination — which leaves the planning team the part that only they can do: deciding what the retreat is *for*.

Travel Connects specializes in group travel out of Parkland, Florida, including corporate retreats and sales kickoffs. If you want a second read on a contract you've been sent, or a sourcing pass on a destination you're considering, that conversation is free and there's no obligation attached to it.

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954-698-4438