

Corporate Retreat Planning Checklist

Peninsula Executive Retreats — peninsulaexecutiveretreats.com.au

A comprehensive checklist for planning a corporate retreat from first brief to post-retreat follow-up. Use this to ensure nothing is missed.

PHASE 1: BRIEF & OBJECTIVES (8–12 weeks before)

Strategic objectives

- ☐ Define the primary purpose of the retreat (strategy, team building, leadership development, planning, or a combination)
- ☐ Agree on 2–3 specific outcomes the retreat must deliver
- ☐ Identify any sensitive topics or dynamics that need to be designed around
- ☐ Confirm whether an external facilitator is required
- ☐ Agree on the format: one-day planning day, two-day residential retreat, or three-day programme

Group & logistics

- ☐ Confirm the final attendee list and group size
 - ☐ Identify any accessibility requirements or mobility considerations
 - ☐ Confirm dietary requirements and allergies for all attendees
 - ☐ Agree on the preferred dates (and two backup options)
 - ☐ Set the overall budget range
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PHASE 2: VENUE & ACCOMMODATION (6–10 weeks before)

Venue selection

- ☐ Shortlist 2–3 venues that match the group size, programme requirements, and budget
- ☐ Confirm the main meeting room capacity and AV capabilities
- ☐ Confirm breakout space availability if required
- ☐ Check outdoor space availability for informal sessions or activities

- ☐ Confirm catering capabilities (dietary requirements, preferred style of service)
- ☐ Confirm accommodation capacity and room types

Booking

- ☐ Review and sign venue contract
 - ☐ Confirm deposit payment and payment schedule
 - ☐ Confirm cancellation and amendment policy
 - ☐ Obtain venue contact details for day-of coordination
 - ☐ Confirm parking and transport access
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PHASE 3: PROGRAMME DESIGN (4–8 weeks before)

Agenda

- ☐ Draft the full agenda with session titles, outcomes, and timings
- ☐ Identify which sessions require facilitation and which are self-facilitated
- ☐ Build in adequate breaks (at least 15 minutes per 90-minute session)
- ☐ Protect the evening for informal connection (do not fill with structured sessions)
- ☐ Include at least one curated experience (winery, wellness, outdoor activity)
- ☐ Build in 20% buffer time across the day

Facilitation

- ☐ Brief the facilitator on the group's composition, dynamics, and objectives
- ☐ Share any relevant pre-read materials or background documents
- ☐ Confirm the facilitator's approach and methodology
- ☐ Agree on session outcomes and success criteria
- ☐ Confirm facilitation fee and payment terms

Pre-work

- ☐ Identify any pre-read materials participants should review before the retreat
 - ☐ Prepare and distribute pre-work at least 2 weeks before the retreat
 - ☐ Consider a short pre-retreat survey to surface key issues and priorities
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PHASE 4: COMMUNICATIONS & LOGISTICS (2–4 weeks before)

Participant communications

- ☐ Send save-the-date with venue address and key logistics
- ☐ Confirm final agenda and distribute to all participants
- ☐ Provide dress code guidance if relevant
- ☐ Share transport options (parking, public transport, shuttle)
- ☐ Confirm any pre-work or reading requirements

Logistics

- ☐ Arrange transport for participants who require it
 - ☐ Confirm room allocations with the venue
 - ☐ Prepare name tags, table cards, and any printed materials
 - ☐ Order any required stationery (notebooks, pens, sticky notes, markers)
 - ☐ Confirm AV requirements with the venue (projector, screen, microphones, clicker)
 - ☐ Test any technology requirements (video conferencing, presentation software)
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PHASE 5: FINAL PREPARATIONS (1 week before)

Venue confirmation

- ☐ Confirm final numbers with the venue
- ☐ Reconfirm dietary requirements and room allocations
- ☐ Confirm catering timings and service style
- ☐ Confirm AV setup and test requirements
- ☐ Obtain emergency contact details for the venue

Materials

- ☐ Print and collate all materials (agendas, worksheets, name tags)
- ☐ Prepare facilitator packs if required
- ☐ Prepare any pre-session materials (flip charts, sticky notes, markers)
- ☐ Confirm any gifts or recognition items for participants

Day-of coordination

- ☐ Confirm arrival time with venue for setup
 - ☐ Prepare a run sheet with timings, contacts, and contingency notes
 - ☐ Brief any internal support staff on their roles
 - ☐ Confirm transport arrangements for all participants
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PHASE 6: ON THE DAY

Setup

- ☐ Arrive at the venue with sufficient time to set up (at least 60 minutes before participants arrive)
- ☐ Test all AV equipment
- ☐ Set out materials, name tags, and stationery
- ☐ Confirm catering timings with the venue team
- ☐ Brief the facilitator on any last-minute changes

During the retreat

- ☐ Welcome participants and set the tone for the day
 - ☐ Keep sessions to time (or flag overruns to the facilitator)
 - ☐ Capture key decisions and actions in real time
 - ☐ Manage energy levels — watch for signs of fatigue and adjust the programme if needed
 - ☐ Photograph key moments if appropriate (with participant consent)
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PHASE 7: POST-RETREAT FOLLOW-UP (within 48 hours)

Outcomes

- ☐ Circulate a summary of key decisions and agreed actions within 48 hours
- ☐ Assign owners and deadlines to every action item
- ☐ Schedule a follow-up check-in (30–60 days post-retreat)
- ☐ Send a thank-you note to the venue and facilitator

Evaluation

- ☐ Gather feedback from participants (a brief survey or one-on-one conversations)
 - ☐ Review the retreat against the original objectives
 - ☐ Document lessons learned for future retreats
 - ☐ Update the budget with actual costs
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ABOUT PENINSULA EXECUTIVE RETREATS

Peninsula Executive Retreats designs and manages fully managed corporate retreats on the Mornington Peninsula, Victoria. We handle every detail — venue selection, accommodation, agenda design, facilitation coordination, catering, activities, and on-the-day management — so you can focus entirely on the work.

Contact us to discuss your next corporate retreat: hello@peninsulaexecutiveretreats.com.au
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