

Small Team Retreat Planning Checklist

Use this checklist to plan a staff retreat that feels intentional, inclusive, and genuinely valuable, without overloading the agenda.

Before the Retreat

- Define 1–2 clear [retreat goals](#) (connection, alignment, [wellness](#), strategy)
- Choose the right format (one-day, weekend, [offsite](#), virtual, or hybrid)
- Set a realistic budget (travel, accommodation, food, activities)
- Select a [retreat venue](#) that supports connection, not just meetings
- Collect anonymous team input on preferences, accessibility, and energy levels
- Build in buffer time and avoid a fully packed schedule

Planning the Experience

- Balance light structure with unstructured social time
- Avoid back-to-back meetings or long presentation blocks
- Include at least one shared, memorable experience
- Design activities that work for introverts and extroverts
- Assign a facilitator or point person to guide the flow

During the Retreat

- Reiterate the purpose and expectations at the start
- Encourage participation without forcing it
- Leave space for organic conversations and [downtime](#)
- Capture insights, ideas, and reflections as they come up

After the Retreat

- Send a short post-retreat survey within 48 hours
- Share key takeaways and decisions with the team
- Translate insights into clear next steps
- Schedule a follow-up check-in to maintain momentum