

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