

Heirloom Haus Wellness Retreat Host Guide

A practical field guide for creating meaningful, memorable retreats

By Heirloom Haus & Co

HEIRLOOM HAUS & CO

WELLNESS RETREAT HOST GUIDE

Welcome

Every unforgettable group trip — the ones people talk about for years, save the dates for, and beg to be invited back to — was not an accident. Behind the signature dinners, the golden-hour group photos, and the feeling of a place fully claimed by your people, there is a plan.

This guide walks you through what it actually takes to bring a retreat or group trip to life: from the first idea to the final toast. It's written for the host who has the vision — the community, the following, the friend group, the brand — but wants to understand the real mechanics of turning that vision into a trip people will never forget.

You don't have to do this alone. Heirloom Haus exists to be the partner behind the plan — the concierge team that handles the details so you can focus on the experience and the people you're bringing together. Throughout this guide, you'll see exactly where we step in.

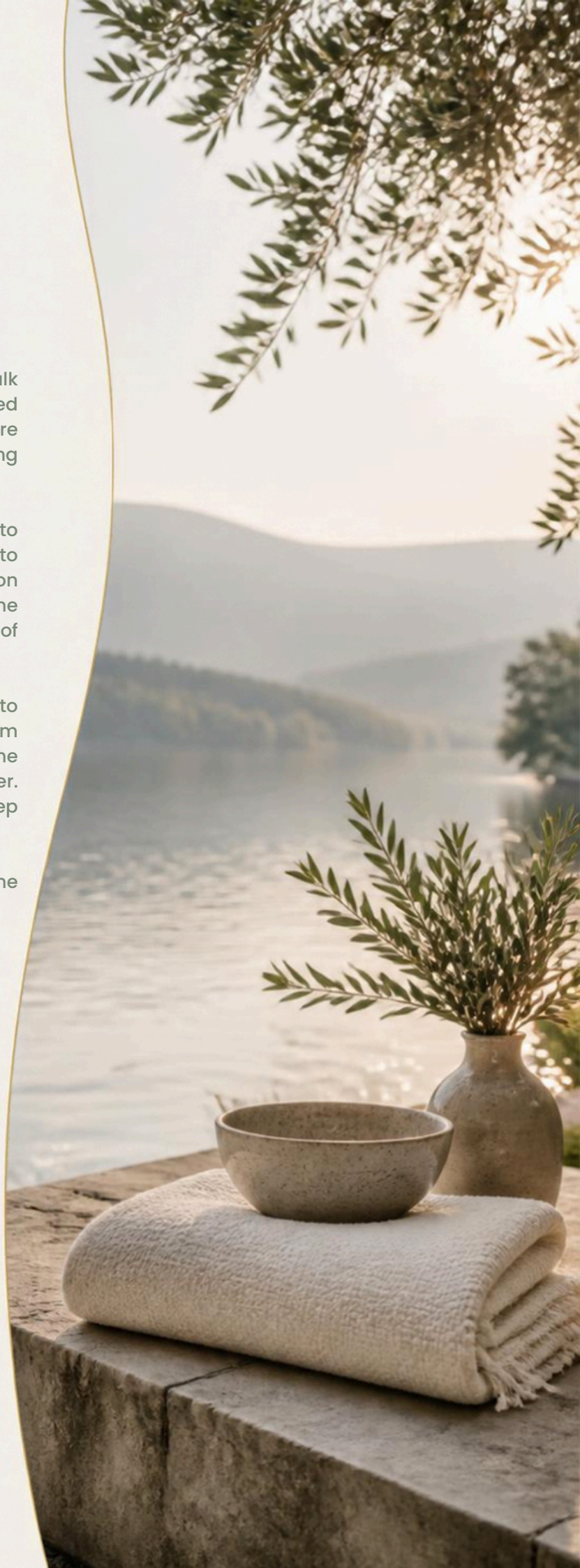
You bring the vision and the community. We bring the systems, the partners, and the execution.

Welcome inside.

A meaningful retreat is felt in the details.

With intention,

Heirloom Haus & Co



What Makes a Meaningful Retreat

Meaningful retreats create room for guests to arrive, be cared for, experience something honest, and return home with practices that last.

01 INTENTION

Start with a clear why. A strong intention shapes every decision — from your setting and schedule to the experiences you choose to offer.

02 RHYTHM

Thoughtful flow balances activity and ease. Build spacious days with moments to move, rest, connect, and simply be.

03 BELONGING

True hospitality makes guests feel seen and at home. Foster connection through shared experiences, beautiful details, and genuine care.

04 INTEGRATION

The retreat doesn't end when guests leave. Offer simple takeaways and resources so the experience lives on in their everyday.



> The measure of a retreat is not how full the schedule feels, but how deeply guests can arrive.

Define Your Retreat Vision & Guest



Clarity here shapes every decision that follows.
Use this space to articulate the heart of your retreat and the guest it is truly for.

1. THE CENTRAL INTENTION
What is the heart of your retreat?

2. THE GUEST IT SERVES
Who is this retreat designed for?

3. THE TRANSFORMATION OR FEELING
What shift or feeling will guests take home?

4. GROUP SIZE
What is the ideal number of guests?

5. EXPERIENCE LEVEL
What level of experience is required or expected?

Design for the guest you can serve with care, not the audience you can reach in theory.

Choosing a Venue

The right venue shapes every layer of the retreat experience — energy, ease, rest, and connection. Use this guide to assess potential spaces through your guests' eyes and your host responsibilities.

ATMOSPHERE Does the energy feel calm, welcoming, and aligned with your retreat's intention?

ACCESS How easy is it for guests to arrive? Consider travel time, transport options, and last-mile logistics.

SLEEP QUALITY Are the bedrooms quiet, dark, and restorative with quality bedding and good air flow?

GATHERING SPACES Do indoor and outdoor areas support both connection and solitude?

BATHING OR SPA FACILITIES Are there clean, beautiful spaces for bathing, steam, sauna, or bodywork? Is privacy ensured?

FOOD SERVICE What are the kitchen facilities and dining experience? Can dietary needs be met with ease and care?

WEATHER RESILIENCE Is there shelter, heating/cooling, and backup power? Can the experience flow in rain or shine?

PRIVACY Does the layout support confidentiality and a sense of retreat from the outside world?

ACCESSIBILITY Can all guests move safely and comfortably throughout the property?

LOCAL CHARACTER Does the setting reflect the culture, nature, and pace of the place in a way that enriches the retreat?

> *"The venue is not the backdrop; it is one of the hosts."*

Venue Walk-Through Checklist

- [ ] First impression and overall atmosphere
- [ ] Arrival experience and parking/drop-off
- [ ] Bedrooms: comfort, light, noise levels
- [ ] Bathrooms and spa facilities
- [ ] Kitchen and dining areas
- [ ] Indoor gathering spaces
- [ ] Outdoor spaces and views
- [ ] Weather protection and climate control
- [ ] Privacy and noise from outside
- [ ] Accessibility within the property
- [ ] Local amenities and emergency services
- [ ] Overall alignment with retreat vision

Budgeting & Pricing



A considered budget creates clarity, sustainable pricing, and a beautiful experience for everyone.

BUILD YOUR BUDGET

01 Venue & Accommodation
02 Food & Beverage
03 Practitioners & Facilitators
04 Transport & Transfers
05 Styling & Supplies
06 Marketing & Communications
07 Host Time & Operational Support
08 Contingency (for the unexpected)
09 Taxes or Fees
10 Payment Terms & Policies

True cost per guest + host margin + contingency

considered retreat price

BE TRANSPARENT

Clearly share what's included and what isn't. Set expectations early so guests can plan with confidence and feel fully informed about their investment.

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Designing the Itinerary



A RHYTHM THAT RESTORES

The most memorable retreats feel unhurried yet intentional. We design each day around a four-part rhythm that nourishes body, mind and spirit—so your guests leave transformed.

MOVEMENT
Energise the body and awaken natural vitality.

NOURISHMENT
Feed with intention and celebrate seasonal goodness.

REST
Create space to soften, slow down and truly rest.

MINDFULNESS
Cultivate presence, gratitude and inner clarity.

ALTERNATE STIMULATION + SPACIOUSNESS

Balance energizing experiences with open, spacious time.

This ebb and flow prevents fatigue and keeps the nervous system in harmony.

ANCHOR WITH MEANINGFUL MOMENTS

Weave in a few signature touchpoints—like sunrise connection, shared meals, or closing ceremonies—to create lasting memories.

PROTECT UNSCHEDULED TIME

Leave generous white space for rest, integration and spontaneous connection.
Some of the magic happens in the in-between.

Arrive • Awaken • Nourish • Restore • Reflect



Movement, Nourishment, Rest & Mindfulness

01

MOVEMENT THAT MEETS GUESTS WHERE THEY ARE

Offer a range of options—gentle, energizing, expressive, restorative—so every guest can choose what feels supportive. Invite, don't require. Encourage listening to the body over keeping up.

02

NOURISHMENT THAT IS GENEROUS AND INCLUSIVE

Serve food that delights and sustains, with thoughtful variety and clear ingredient awareness. Honour dietary needs without making anyone feel separate. Make every meal a moment of care and connection.

03

REST THAT IS DELIBERATELY PROTECTED

Build in unhurried pockets and quiet hours. Protect sleep with a calm environment, low stimulation, and clear boundaries. Rest is not the absence of activity—
it is a priority.

04

MINDFULNESS THAT FEELS GROUNDED RATHER THAN PERFORMATIVE

Create space for simple practices that anchor attention and gratitude in daily life. Let it be real, accessible and optional—
no pressure, no perfection.

FIELD NOTE

Where can the day soften?

Guest Experience & Thoughtful Touches

A retreat is more than a schedule—it's a feeling of care woven through every moment. Design each part of your guests' journey with intention, allowing room for rest, connection, and personal choice.

> *Thoughtfulness is often quiet, practical, and perfectly timed.*



Communicate clearly and warmly before arrival. Greet guests personally and help them settle in.

ROOM SET-UP:
CREATE A CALM, COMFORTABLE SPACE—CLEAN, UNCLUTTERED, AND ATTUNED TO THE SEASON.

WELCOME RITUAL:
OFFER AN OPTIONAL GROUNDING RITUAL TO HELP GUESTS ARRIVE—TEA, BREATH, FOOT SOAK, OR SIMPLY A FEW QUIET MINUTES.

MEALS:
NOURISH WITH SEASONAL, INCLUSIVE FOOD. SHARE THE WHY BEHIND YOUR CHOICES AND ACCOMMODATE PREFERENCES WITH CARE.

TRANSITIONS:
ALLOW TIME BETWEEN SESSIONS AND ACTIVITIES. BUILD IN PAUSES FOR REFLECTION AND REST.

PERSONAL SPACE:
RESPECT ALL COMFORT LEVELS. ENCOURAGE BOTH CONNECTION AND SOLITUDE.

ACCESSIBILITY:
DESIGN AN ENVIRONMENT THAT IS PHYSICALLY ACCESSIBLE AND EMOTIONALLY WELCOMING FOR ALL.

DEPARTURE:
CLOSE WITH GRATITUDE. OFFER A GENTLE SEND-OFF AND SHARE HOW THEY CAN STAY CONNECTED IF THEY WISH.

THOUGHTFUL TOUCHES

- Handwritten welcome note
- Clear packing guidance
- Bedside water
- Local detail
- Quiet closing moment

Wellness Practitioners & Partners



CREDENTIALS & SCOPE OF PRACTICE | VERIFY TRAINING, CERTIFICATIONS, INSURANCE, AND PROFESSIONAL AFFILIATIONS. ENSURE THEIR OFFERINGS ALIGN WITH THEIR QUALIFICATIONS AND LOCAL REGULATIONS.

COMPLEMENTARY STRENGTHS | SEEK PRACTITIONERS WHOSE OFFERINGS ENHANCE YOUR PROGRAM—MIND, BODY, SPIRIT, AND CREATIVITY—CREATING BALANCE AND FLOW.

COMMUNICATION STYLE | CHOOSE PARTNERS WHO ARE WARM, CLEAR, AND RESPONSIVE, AND WHO COLLABORATE WELL WITH HOSTS AND GUESTS.

GUEST SAFETY | CONFIRM LIABILITY INSURANCE, FOLLOW HEALTH AND SAFETY PROTOCOLS, AND RESPECT BOUNDARIES AND CONFIDENTIALITY AT ALL TIMES.

CONTRACTS & AGREEMENTS | USE A WRITTEN AGREEMENT THAT OUTLINES SCOPE, SCHEDULE, DELIVERABLES, CANCELLATION AND POLICY, AND EXPECTATIONS.

FEES & FINANCIAL TERMS | AGREE ON FEES, INCLUSIONS (E.G., MEALS, TRANSPORT), PAYMENT SCHEDULE, AND ANY REVENUE-SHARING ARRANGEMENTS.

TRAVEL & ACCOMMODATIONS | CLARIFY ARRIVAL/DEPARTURE DETAILS, AIRPORT TRANSFERS, ROOM TYPE, AND ANY DIETARY OR ACCESSIBILITY NEEDS.

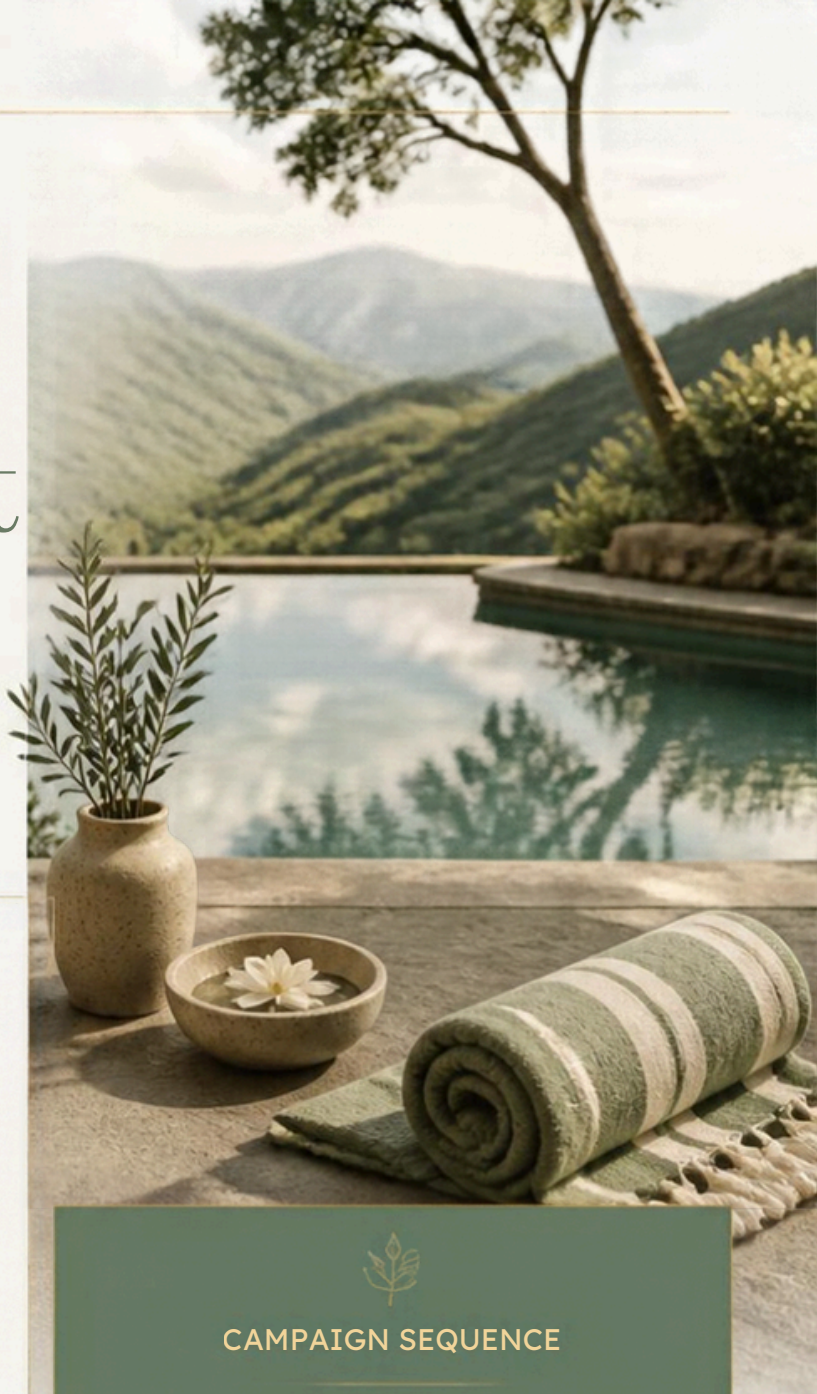
BRIEF & ALIGN | SHARE THE RETREAT VISION, GUEST PROFILE, SCHEDULE, AND LOGISTICS IN ADVANCE SO THEY CAN PREPARE THE MOST SUPPORTIVE EXPERIENCE.

PARTNER BRIEFING CHECKLIST

- [ ] Arrival time & logistics
- [ ] Session intention & desired outcomes
- [ ] Accessibility considerations
- [ ] Space setup & equipment needs
- [ ] Emergency contact information
- [ ] Health & safety considerations
- [ ] Communication during the retreat
- [ ] Payment terms & schedule
- [ ] Departure details

A clear brief creates a seamless experience for your partners and your guests.

Marketing & Filling Your Retreat



INVITE THE RIGHT PEOPLE WITH A MESSAGE THAT RESONATES.

Your marketing isn't about selling. It's about storytelling, service, and alignment—so the people who need your retreat can find it, feel it, and say yes with confidence.

ARTICULATE THE PROMISE

Be clear about what guests will experience and how it will support them. Describe the transformation, not just the itinerary—and never overpromise.

DEFINE THE RIGHT GUEST

Speak to the ones you're here to serve. Clarity attracts alignment and helps the right people feel seen.

CREATE A CLEAR OFFER

Make it easy to understand what's included, what to expect, and how to reserve their place.

USE EVOCATIVE, TRUTHFUL IMAGERY

Show the experience, not just the location. Let your photos and words transport and reassurance.

BUILD A STORYTELLING SEQUENCE

Use email and social media to share your story, the retreat's heart, and guest testimonials over time.

COLLABORATE WITH ALIGNED PARTNERS

Co-create with brands, healers, and hosts who share your values and can introduce your retreat to new audiences.

MAKE BOOKING EASY TO UNDERSTAND

Provide clear details on what's included, travel notes, FAQs, and how to secure a spot.

CAMPAIGN SEQUENCE

01 CLARIFY
Define your message, promise, and ideal guest.

02 INVITE
Share stories and content that spark connection and curiosity.

03 REASSURE
Answer questions, share proof, and reduce any hesitation.

04 WELCOME
Guide them to say yes and feel confident every step of the way.

> *When your message is rooted in service, the right people find their way to you.*

The Week Before

A CALM CHECKLIST TO PREPARE WITH CLARITY

- [ ] **CONFIRM GUEST DETAILS AND DIETARY NEEDS**
  Review preferences, allergies, and any special requests.
- [ ] **RECHECK VENUE LOGISTICS**
  Walk through the space, verify timelines, deliveries, and access.
- [ ] **BRIEF PRACTITIONERS AND STAFF**
  Share schedules, roles, and key guest notes. Answer questions.
- [ ] **FINALIZE THE RUN OF SHOW**
  Confirm timing, transitions, and any last details.
- [ ] **PACK SUPPLIES**
  Gather essentials for sessions, hospitality, and emergencies.
- [ ] **PREPARE WELCOME MATERIALS**
  Assemble folders, gifts, signage, and room touches.
- [ ] **CHECK WEATHER AND TRAVEL NOTES**
  Monitor forecasts and share any timely updates.
- [ ] **SEND THE FINAL GUEST MESSAGE**
  Include arrival info, reminders, and what to expect.
- [ ] **PROTECT YOUR OWN REST**
  Delegate what you can and leave space to recharge.



Prepared does not have to mean hurried.

Day-of Checklist

- [ ] **ARRIVAL & ROOM READINESS**
  Walk the space and reset as needed.
  Check linens, lighting, scent, temperature.

- [ ] **PRACTITIONER SET-UP**
  Confirm arrival and timing.
  Ensure tools, music, water, and signage are ready.

- [ ] **FOOD & BEVERAGE TIMING**
  Start hydration on arrival.
  Prep snacks and meals per the schedule.

- [ ] **WELCOME & ORIENTATION**
  Greet guests personally.
  Share flow, boundaries, and key logistics.

- [ ] **TRANSITIONS BETWEEN SESSIONS**
  Allow time to reset rooms.
  Guide guests with clarity and calm.

- [ ] **GUEST COMFORT**
  Check in discreetly.
  Offer what's needed, without over-offering.

- [ ] **SCHEDULE FLEXIBILITY**
  Stay present and responsive.
  Adjust with intention, not apology.

- [ ] **PHOTOGRAPHS OR CONTENT CAPTURE WITH CONSENT**
  Ask before capturing.
  Honor no's graciously.

- [ ] **CLOSING THE DAY**
  Thank your guests and practitioners.
  Share what's next and aftercare notes.
  Reset the space with care.

Your steadiness is part of the atmosphere.



After the Retreat

The retreat doesn't end at checkout. A thoughtful follow-up honors your guests, supports your partners, and strengthens your retreat business.

FIRST 24 HOURS

01 **THANK YOUR GUESTS**
Send a warm thank-you message and express your gratitude.

02 **SETTLE PARTNER PAYMENTS**
Process outstanding payments and confirm receipt.

03 **GATHER FEEDBACK WHILE FRESH**
Send a short survey or voice-note prompt while the experience is top of mind.

04 **SHARE PROMISED RESOURCES**
Send slides, recipes, reading lists, or supplier links you promised.

05 **ORGANISE CONSENTED IMAGES**
Collect, credit, and store photos according to agreed permissions.

FIRST WEEK

06 **RECORD WHAT WORKED**
Note highlights, guest reactions, and partner strengths.

07 **NOTE WHAT TO CHANGE**
Capture challenges, gaps, and improvement ideas.

08 **SCHEDULE YOUR DEBRIEF**
Block time for a personal debrief to reset, reflect, and plan ahead.

Close the loop • Capture the learning • Carry it forward





Follow-up & Lasting Connection

A thoughtful follow-up honors the time you shared and helps your guests carry the retreat forward. Keep it personal, useful, and true to your boundaries.

A PERSONAL THANK-YOU

Send a sincere note within a few days.
Reference a moment, conversation, or quality you appreciated about their presence.

A USEFUL PRACTICE OR RESOURCE

Share one simple practice, reflection prompt, or resource that supports integration. Short, clear, and easy to return to.

AN INVITATION TO STAY CONNECTED

Invite guests to stay in touch in a way that feels right for you—such as occasional letters, seasonal updates, or future retreat news.

A CLEAR BOUNDARY

You are not obligated to promote to your guests.
Let them know you will only reach out for meaningful updates or future offerings.
No surprises, no pressure.

HOST REFLECTION

What do I hope guests remember six weeks from now?

From Planner *to* Host

The details are in place, the flow is set, and your team is ready. Now, your role shifts—from coordinating everything to holding the experience.
This is where presence becomes the greatest gift you offer.

NOTICE THE ROOM
Read the energy, observe what's needed, and adapt with care.

PROTECT THE PACE
Guard the rhythm of the day.
White space is part of the experience.

MAKE DECISIONS WITH WARMTH
Lead with intuition and kindness.
Small choices shape big feelings.

LET SUPPORT TEAMS SUPPORT YOU
You don't have to do it all.
Empower your team and trust them to hold their lane.

REMAIN PRESENT WITH GUESTS
Your calm presence, open heart, and genuine connection are what guests will remember most.

Planning builds the container. Hosting brings it to life.

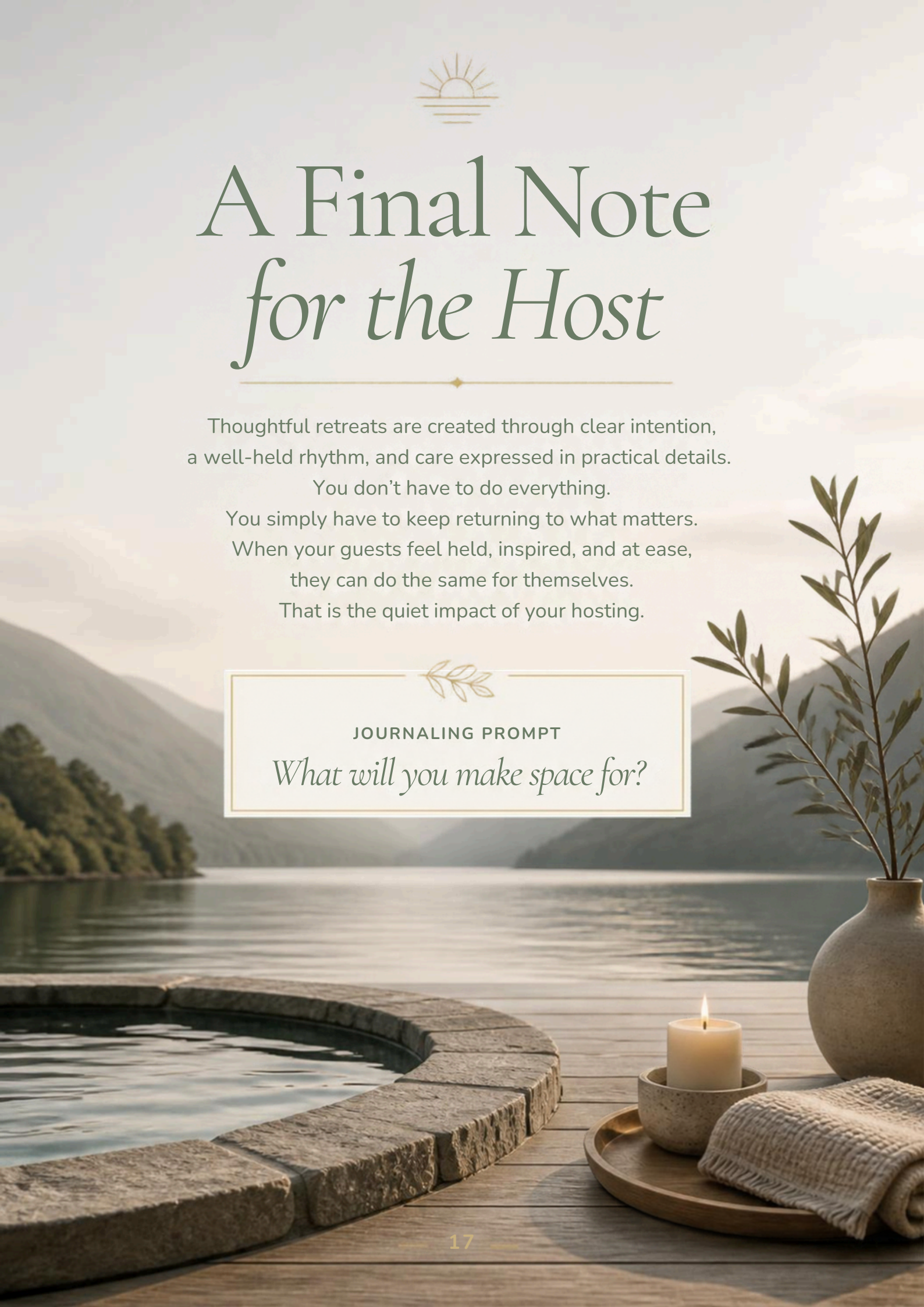


A Final Note *for the Host*

Thoughtful retreats are created through clear intention,
a well-held rhythm, and care expressed in practical details.
You don't have to do everything.
You simply have to keep returning to what matters.
When your guests feel held, inspired, and at ease,
they can do the same for themselves.
That is the quiet impact of your hosting.

JOURNALING PROMPT

What will you make space for?



PLAN WITH AN ADVISOR

Why Book Through Heirloom Haus

You bring the vision. We handle the details that make a retreat feel effortless. Our network of travel advisor and concierge, Heirloom Haus works alongside retreat hosts to source the right setting, secure better value, and unlock perks you won't find booking on your own.



WHY WORK WITH AN ADVISOR

Access You Can't Book Online

Advisor relationships can unlock added value like room upgrades, daily breakfast, spa or resort credits, and early check-in or late checkout, when available.

Group Rates & Room Blocks

We negotiate group pricing, flexible room blocks, and terms that protect your deposit and your margin.

An Advocate When Plans Change

Flights shift, weather turns, venues fall short. You'll have someone on your side who knows exactly who to call.

Time Back for What Matters

Less time comparing properties and chasing confirmations. More time designing an experience your guests will remember.

HOW WE SUPPORT RETREAT HOSTS

- Venue sourcing & recommendations
- Group rates & room blocks
- Negotiating group terms & inclusions
- Guest travel, transfers & arrivals
- Curated dining, spa & experiences
- Pre- and post-retreat stays



Thank You

To every host and planner,
thank you for creating spaces where people can slow down, breathe deeply, and truly connect. Your care makes each retreat unforgettable.

We are grateful for you.

With intention, always.

www.heirloomhausco.com | @Heirloomhausco