



THE CORE ELEMENTS OF REGISTRATION & DETAIL MANAGEMENT



1. TRACKING INQUIRIES AND SIGN-UPS

Use a centralized tracking system to track every inquiry from the very first contact. Whether you use a spreadsheet, a customer relationship management (CRM) tool, or retreat registration software, having all your participant information in one place ensures that nothing gets lost and that each person feels seen and supported.

- **Types of Tracking Systems:**

- ◊ **Spreadsheets (Google Sheets, Excel)**

Definition: A customizable table where you manually track participant data.

Pros: Free or low-cost, highly flexible, easy to share with a team.

Cons: Requires manual updates, higher risk of human error, less automation.

- ◊ **CRM (Customer Relationship Management) Tools (e.g., HubSpot, Zoho, Airtable)**

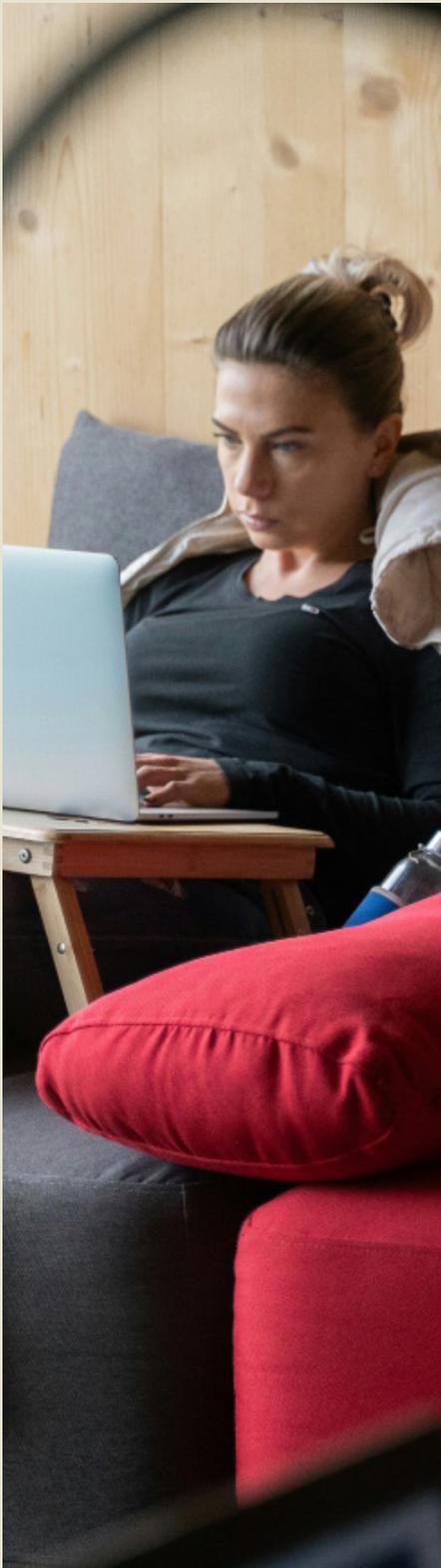
Definition: Software designed to track leads, communication history, and relationships.

Pros: Automates reminders and follow-ups, organizes leads clearly, scalable as your retreat business grows.

Cons: Steeper learning curve, may feel more complex than needed for small retreats, subscription costs.



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◇ **Retreat Registration Software (e.g., WeTravel, Retreat Guru, BookRetreats)**

Definition: Platforms built specifically for retreat leaders to manage sign-ups, payments, and participant details.

Pros: All-in-one solution with built-in payment processing, forms, and participant tracking; professional experience for participants.

Cons: Monthly fees or transaction fees, less customizable than spreadsheets or general CRMs.

WHAT TO TRACK:

Regardless of the system you choose, your tracking should include fields for:

Name & contact information

Date of inquiry

Source of lead (social media, personal outreach, referral, etc.)

Notes on conversations or follow-up needed

Status (interested, confirmed, waitlisted, declined)

This process helps you avoid losing track of potential participants and ensures no one gets overlooked.



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2. PAYMENTS & FINANCIAL TRACKING

Clarity around payments creates trust and prevents misunderstandings. To keep your process professional and stress-free, put clear systems in place for how payments are handled. The following practices will help you stay organized while giving participants confidence in the process:

Set clear deposit requirements and payment deadlines.

Automate payment reminders whenever possible.

Keep a record of all transactions, including date, amount, and payment method.

Consider offering payment plans for accessibility.

3. COLLECTING PARTICIPANT INFORMATION

To care for your participants well, you'll need more than just their names and emails. Collect information that will help you plan and support them fully. For starters, here's what you need to know:

Dietary preferences and restrictions

Medical considerations (allergies, mobility needs, medications)

Travel details (arrival/departure times, flight numbers)



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Rooming preferences (single/shared, roommate requests)

Emergency contact information

All of this data should live in one central document, often called a Manifest. Having everything in one place ensures your whole team is working from the same information and can respond quickly if needs arise.

4. COMMUNICATION & REMINDERS

Good communication reassures participants and keeps them engaged between the time they register and the time they arrive. Create a standard communication flow that includes:

Welcome/confirmation email immediately upon registration

Preparing for Your Retreat email about 4 weeks before departure

Arrival Instructions email about 2 weeks before departure

Final reminders or text alerts 1–2 days before departure

When participants receive timely and thoughtful updates, they feel held and guided, and that feeling will carry into their retreat experience.



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5. POLICIES & BOUNDARIES

Clear policies protect both you and your participants. Having these in writing and communicated early ensures everyone knows what to expect and prevents misunderstandings later.

Your policies should cover:

Payment policies – deposit amounts, due dates, and accepted methods

Cancellation policy – deadlines, refund terms, and any non-refundable deposits

Travel insurance recommendation – strongly encourage participants to protect their investment

When participants understand the boundaries from the beginning, you set the stage for a smoother and more professional experience for all involved.

PRACTICAL TIPS FOR SMOOTH REGISTRATION

If your participants feel taken care of from the moment they say ‘yes,’ they’ll arrive more relaxed and open to the experience. That starts with how you manage the small details.



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To keep everything running smoothly, focus on creating simple systems that you and your team can consistently maintain. A few key practices can make a big difference in helping participants feel cared for and ensuring no detail is overlooked:

Create a **Retreat Detail Spreadsheet (RDS)** with all registration and logistical information.

Keep the RDS updated in real-time so everyone on your team has the latest information.

Assign a single point of contact for participants so communication stays clear and consistent.

Track “special cases” (late arrivals, early departures, special celebrations, etc.) so they don’t get lost in the shuffle.