



FOR HR LEADS & FOUNDERS BUILDING THE CASE

Make the case *before* they ask for it.

A working budget and ROI framework for bringing a retreat, offsite, or incentive trip proposal to leadership — so the conversation starts with numbers, not guesses.

Most retreat proposals get questioned because the numbers show up after the idea does. This worksheet flips that order. Fill it out before your next budget conversation, and you walk in with **a number, a reason, and a return** — not just a request.

01 — THE BUDGET BUILDER

Estimate the real cost, line by line.

Use rough numbers if exact quotes aren't in hand yet — this is a planning estimate, not a final invoice.

CATEGORY	PER-PERSON COST	HEADCOUNT	SUBTOTAL
Lodging (per night × nights)			
Meals & group dining			
Meeting space & AV			
Ground transport & transfers			
Activities & team experiences			
Planning & advisor coordination			
Contingency (10% of subtotal)	—	—	
TOTAL ESTIMATED INVESTMENT			\$



02 — THE ROI CASE

Translate the spend into a return.

This is the part most proposals skip — and the part that actually gets a yes.

What does it cost to do nothing?

Average cost to replace one employee runs 50–200%
of their salary. Average salary at risk: _____

× estimated turnover risk = _____

What outcome are you actually buying?

☐ Retention ☐ Alignment after a hard quarter ☐ Onboarding new leadership

☐ Momentum before a launch ☐ Reset after rapid growth ☐ Other: _____

ILLUSTRATIVE EXAMPLE

Team of 15. Estimated retreat investment: \$18,000. Average replacement cost per departure: \$35,000–\$70,000. One retained employee pays for the trip twice over — before counting the upside in alignment and momentum.

03 — THE PITCH FRAMEWORK

Three lines. That's the whole pitch.

1 THE PROBLEM

2 THE INVESTMENT

3 THE RETURN

LMS TRAVEL GROUP • LMS COLLECTIVES

Once the case is built, we build the trip.

LMS Travel Group designs and manages end-to-end retreats, offsites, and incentive trips to the Mexican Caribbean, Jamaica, and St. Lucia for small and mid-sized businesses. Every detail handled. Every dollar justified.

Let's talk • travel@lmscollectives.com • [LMS Travel Group](#)