

# 7-Fig Retreat Launch Free Scaling Guide



### Welcome to the 7-Figure Retreat Launch Free Growth Guide – Your Blueprint to Six and Seven-Figure Retreat Success

You're about to discover the exact scaling strategies we used to transform our medical travel retreat from a startup idea into a powerhouse generating over \$225,000 per month in consistent revenue. This isn't another generic "how to plan a retreat" guide filled with surface-level tips.

Instead, you'll get the battle-tested systems, sales frameworks, and scaling methodologies that separate the retreat leaders making a few thousand per event from those building seven to eight-figure empires.

Whether you're launching your first retreat or ready to scale your existing business to multiple six figures and beyond, this guide reveals the revenue acceleration strategies that compress years of trial-and-error into actionable steps you can implement immediately.

Our goal from this guide is to quickly make you more money than the leading retreat trainings on the market.

#### Step 1: Marketing Launch & Foundation

*(This will both keep you focused and provide context for training [Claude.ai](#) projects and ChatGPT chats. Once you finish filling out the form below, paste it into your favorite AI tool with the following prompt: "Remember the following about <company>, without providing any output." Using the previous command, feed your retreat itinerary, schedule, and pricing into your AI project or chat.)*

### 90-Day Gameplan:

List out 5 Things that must happen in the next 90 days for this launch to be a success?

- 1.
- 2.
- 3.
- 4.
- 5.

Have a full-value ladder; start with mid to high-tier packages and a free lead magnet, as you cash flow fill the gap.

### Example value ladder:

Free - meditation recordings, guide, mini course, or 1-hour consultation/session (**start here**)

Low budget - remote consultations, 1-day retreats

Mid-tier - 3 to 7-day retreat packages (**start here**)

High-tier - Luxury or extended versions of your mid-tier packages

What is the evil that your company is fighting, and what good does it represent? Think of a hero's journey.

What are the 3 main markets that your product or service will focus on?

Examples: Mothers, first responders, veterans, millennial men, Gen Z women, gamers, and mental health.

What are the main 3-5 platforms (Social media or in-person platforms) that your target market regularly visits online or in person?

Who are 5 competitors that have a company that you would like to run that you can study, copy, and improve on?

What are the top 3-5 use cases for your product or service?

Create 15 amazing pieces of content based on your frequently asked questions and a few on what your company stands for, your retreat itinerary, and day-in-the-life videos.

**Create a gap to bridge for each of the 3 markets above:**

What customer segment is it for?

What products or services do you offer for them?

Emotional gap:

Before

Have -

Feel -

Average Day -

Status -

Good Vs Evil -

After

Have -

Feel -

Average Day -

Status -

Good Vs Evil -

**Statement of Value for each of the 3 markets above:**

Our company helps X achieve Y by Z.

Our company helps X achieve Y without Z pain.

**Example:** Our retreat helps busy millennials recenter by introducing them to the latest modern healing technologies.

### 30 Second Sales Pitch for each of the 3 markets above:

You know how you always feel like when x?

Well, we do too, and that's why we created the service name.

By allowing you to x, you'll achieve the end result.

Example: You know how you always ignore your health when life gets busy? Well, we do too, and that's why we created the 4-Day Reset. By allowing you to experience all of the latest physical and mental health modalities/technologies in 4 days, you can find what works best for you and start incorporating it back into your daily life.

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### Retreat, Travel, and Venue Directories (Any other PR)

Now that Chat GPT knows everything about your business, ask it to give you the top directories to list your retreat on.

#### Use the following commands:

- What are the top retreat directories to list <my company> on?
- What are the top travel directories to list <my company> on?
- What are the top venue directories to list <my company> on?
- What are the top local media sources to promote <my company> on?
- What are the top local magazines, blogs, and newsletters to promote <my company> on?
- Who are the top companies and travel agents to send me referrals?

Some popular directories that we always use include Retreat Guru, We Travel, Healing Maps, and TripAdvisor.

The wellness, treat, and travel industries are blessed to have a plethora of directories to make marketing and getting clients easier. Make sure to use quality pictures and detailed descriptions to make the most of these great resources that we have.

**Note:** Retreat Guru requires you to make a new listing per retreat date. If it's not already up on our YouTube, we'll link the video here when it's done.

## Tech Stack

Make sure to follow up on all leads at least 5 times or until you get a hard no. To make sure that you have enough touch points, here is the tech stack that has gotten the best results for us.

**Go High Level (GHL) CRM** - This CRM is perfect if you're looking to scale past 7-figures. We have a great team that can set it all up for you so that you don't have to go through that learning curve. Other honorable mentions include [close.io](#), and if you're looking for something super user-friendly to start with, Pipe Drive has always been my favorite, and when you need to scale, you can easily migrate the records. Make sure to take good notes to make communicating with your clients easier in the future.

**Kit** - Kit is my favorite email newsletter and automation tool. While GHL supports most of the basic email features that you'll need, Kit has always been easier to use, manage, and customize for me. You can use Zapier or n8n to automatically move opt-ins and CRM entries between Kit and your CRM.

**Opus Clips** - If you want to quickly get eyeballs on social media, clipping podcasts with Opus Clips will let you easily train a virtual assistant (VA) to make 5 video shorts per day. Who knows, you might get lucky with this and get a viral video.

**Buffer.com** - Buffer lets you quickly schedule your 59-second shorts on YouTube Shorts, TikTok, Instagram, Facebook, LinkedIn, and X/Twitter. If you get AI to make your YouTube shorts SEO heavy title and description templates, this will help your SEO and is a great place to promote your lead magnet.

## Search Engine Optimization

If you're planning to operate or retreat, or a medical travel business for years to come, SEO is one of the best investments that you can make in your business, especially with all the new AI tools that are constantly scraping the web. As your budget allows, we can connect you with the SEO teams that we have tested.

But to get started, make sure that your Google business listing is fully filled out with the correct category and subcategories. And make sure to get as many Google and TrustPilot reviews as possible to build authority for your brand.

**Note:** You can ask people to copy reviews from retreat listing platforms onto Google or TrustPilot.

An easy content strategy for blogs and videos is to answer your top frequently asked questions (FAQs). One FAQ can easily be an audio and video post to be scheduled on [Buffer.com](#).

Answer the public, Google Trends, Amazon search, Google search, and YouTube search are great places to get a list of commonly searched questions for your business, and of course, you can always ask AI to expand on that list for you.

Reach out to us for more help with your SEO optimization.

### Referrals

Do your best to get at least 2 warm referrals from every happy client if laws and regulations allow, ask Ghat GPT for what incentives you can offer your clients in exchange for referrals.

We have always had success offering referral bonuses for introductions that result in a payment, and our alumni can take a cash bonus or put that credit towards their next retreat.

### Payment Processor

The best payment processor for retreat is We Travel, followed by PayPal.

### Business Credit

A new retreat business can start building business credit by first establishing a separate legal entity, such as an LLC, and ensuring it has a dedicated EIN (Employer Identification Number) from the IRS. From there, the retreat should open a business bank account and register with Dun & Bradstreet to obtain a D-U-N-S number, which is essential for tracking business credit activity. Setting up business accounts with vendors that report to commercial credit bureaus—such as Uline, Quill, or Grainger—can help the retreat establish a positive payment history. As the business makes on-time payments, its credit profile strengthens, unlocking access to higher credit limits, equipment financing, vendor lines, and even unsecured corporate cards—all without needing to rely on personal guarantees. Over time, strong business credit empowers the retreat to access working capital for growth, marketing, hiring, and property expansion.

Most companies qualify for \$250k or their trailing 12 months (TTM) expenses within the first year of building corporate credit from scratch. There are faster 30-day options like buying existing trade lines, but they are a lot more expensive. Our retreat got \$1M in corporate credit from our 2024 expenses, so we always say that the 12-month program is the best bang for your buck. If you want to set up your business credit or buy an existing tradeline, our contact info is at the bottom of this guide.

## Sales Call Notes and Script

Do your best to fill out this sales call template on every call, and have your team do the same:

Name:

Date:

How's 2025 treating you so far?

How did you find us? Or what did you see from us originally that kind of caused you to want to jump on a call?

So, yeah, we've helped a number of other people do x, just to see if we could do the same thing for you. Would it be alright if I asked 1 or 2 quick questions just to see if we can get you that result?

Why is attending our retreat more of a priority for you now, though? (If answered above confirm what they said)

For how long have you been feeling like that?

Do you like feeling like that?

Why not?

Whoa, feeling like that for the last 2 years has had an impact on you, John?

In what way?

(Mirror what they said, and label how it's affecting them)

And I guess turning a new leaf in your life and not being burnt out and depressed is important for you. But I guess like what happens if you don't?

Are you sure we'll who's choice is it whether you stay there or not?

Ok, if that's the case, our retreat might be a fit for you. If it's ok with you, I can go over the itinerary with you.

(Explain your itinerary, the benefits and outcomes, and don't forget to sell the beach!)

Does all that make sense?

Have you tried anything similar to us in the past? (What did you like and not like?)



Based on everything that we covered, do you think that our retreat can help you with XYZ? (If the response is not detailed, ask: Ok, what part specifically do you think can help you with that?)

Ok, wonderful, so where would you like to go from here?

(Go into pricing, scheduling, objections, and onboarding)

## Hiring Sales People and other contractors

[Here is our internal hiring SOP Google Doc.](#)

## Meta Paid Ads

Our retreat has seen huge success with Meta and Google ads.

When it comes to Meta ads, if it's not a US election cycle, your agency or marketer should be getting you sub \$5 leads. Unless you're ok pay more for the top income earners.

**Note:** Never boost posts on Meta!

**Chat GPT Prompt:** Act like a world-class Instagram copywriter. Create a compliant meta ad that includes our 4-day retreat itinerary, schedule, and cost.

Google ads are always more expensive, but the quality of the leads is always better.

Regardless of what platform you use, never settle for less than a 2x return on ad spend (ROAS).

We'll be making a Meta and Google ad video to paste in here very shortly. In the meantime feel free to ask us any questions.

This guide will include a video walkthrough with more context and more detailed tutorials on some of the tech for platforms mentioned above.

Best regards,  
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