

Transformational Retreat Framework



retreatmasterylab

Welcome!

You are here because you're not interested in hosting another event. You are called to create a transformational experience that moves people, awakens possibility, and inspires meaningful change. This workbook will serve as your framework in designing that transformation with intention, clarity, and confidence.

There are three essential forces at play in every successful retreat:

- ✶ **Facilitator Certainty** – the confidence and competence to lead one-to-many transformation with clarity, authority, and emotional mastery.
- ✶ **Event Design** – the facilitation, flow, and emotional journey you craft for your participants.
- ✶ **Event Management** – the logistics, timing, and container that holds and supports the design.

All three matter. All three impact transformation. But they are not the same.

Mastery comes from learning to design the experience with precision – and manage the container with excellence.

Retreats come in all sizes: from intimate circles of 5–10 to ballrooms of 1,000+. But no matter the size, your focus remains the same:

**Create An
Experience That
Transforms The
Room –
Not Just Fills It.**





The Five Phases Of A Transformational Retreat

Every powerful retreat is built in five intentional phases, each serving a distinct purpose in transforming your participants.

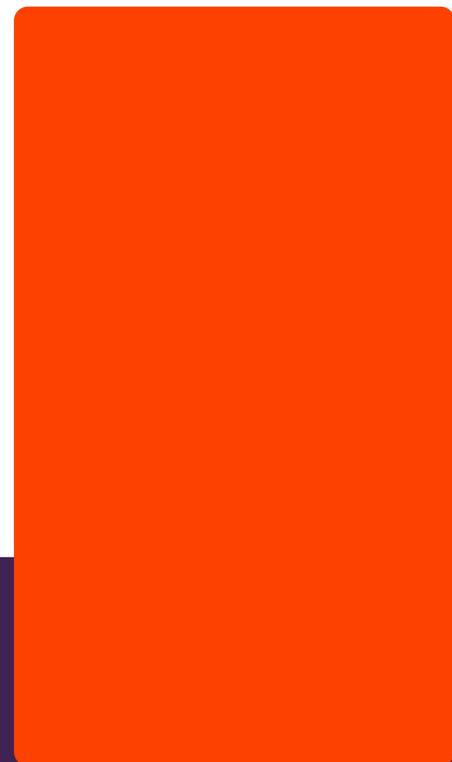
- ✦ **Development** is where you design the container: your audience, your promise, and the experience that will deliver it. You are designing the strategic elements that shape the participant's journey
- ✦ **Before** is where you prepare the hearts and minds of your attendees, so they arrive open, grounded, and ready for breakthrough.
- ✦ **During** is where the facilitation, flow, energy, and curriculum come together to create the transformation in the room.
- ✦ **Ending** the retreat is where you gently close the emotional journey with grounding, clarity, and integration, ensuring your participants leave whole, complete, and empowered for what comes next.
- ✦ **And After** is where you reinforce and extend that transformation, ensuring the breakthroughs don't fade when the retreat ends. When these four phases work in harmony, you don't just host a retreat—you create an experience that changes people, stays with them, and leads them into the next chapter of their journey with you.

Build The Foundation Of A Transformational Experience

Every life-changing retreat begins long before the first welcome, the first exercise, or the first breakthrough. Transformation is designed with intention.

In this phase, you will lay the foundation that shapes every choice you make – who you serve, what you promise, and how you will deliver an experience that shifts people at the identity level. When you gain clarity in these three core areas, your marketing becomes more magnetic, your facilitation becomes more confident, and your retreat becomes a powerful, cohesive journey instead of a collection of moments.

This is where your retreat vision takes form – with purpose, precision, and heart.



PART 1: KNOW YOUR AUDIENCE

Before you can transform a room, you must understand who you are inviting into it. Clarity here gives you your message, your marketing, your tone, your exercises, and even your energy as a facilitator. Use this section to define the specific person your retreat is designed to serve.

1. Who They Are (Identity, role, or stage of life/business)

My ideal attendee is...

(Example: "Women entrepreneurs in their first 3–5 years who are ready to scale but feel stuck in self-doubt.")

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2. What They're Experiencing (Their felt problem or desire)

Right now, my attendee is struggling with...

(Example: "Feeling overwhelmed, lacking clarity, and not sure how to move forward.")

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3. Why It Matters (Their emotional or aspirational reason for change)

It matters to them because they deeply want...

(Example: "Financial freedom, confidence, and a clear path that finally works.")

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4. Event Alignment (How your retreat becomes the answer)

This retreat will give them...

(Example: "The breakthroughs, clarity, and support they've been searching for but haven't found.")

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5. Marketing Focus (Language that speaks directly to their heart and reality)

To call them in, I will speak to...

(Example: "Their desire for clarity, their frustration with doing it alone, and their craving for real transformation.")

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**When My Ideal Attendee Reads My Retreat Message, I Want Them To Think:
"This Is For Me. They Understand Me. I Belong In That Room."**

Bring It All Together

Using your answers from the prompts above, combine your clarity into one powerful statement. This will become the foundation of your retreat messaging, marketing, and facilitation.

Complete this sentence:

My retreat is designed for (identity) who are currently struggling with (problem) because they deeply want (desire) and this retreat will help them (transformation) so they can (ultimate outcome).

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PART 2: CRAFT THE PROMISE & SHAPE THE TRANSFORMATION

Your retreat promise is the heartbeat of your event. It gives your participants a clear reason to say “yes,” your marketing a message to rally around, and your facilitation a destination to guide toward. Use this section to define the identity-shifting transformation your retreat will deliver.

1. Core Takeaway (What they walk away with)

By the end of this retreat, my participants will walk away with...

(Example: “Clarity, a renewed sense of purpose, and a step-by-step plan they believe in.”)

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2. Attendee Benefit (Why it’s worth their time, money, and energy)

This retreat is worth attending because it will...

(Example: “Save them years of trial-and-error and give them the breakthrough they couldn’t create alone.”)

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3. Promised Outcome (What you can confidently guarantee)

The result or transformation I can confidently promise is...

(Example: “A clear roadmap, renewed self-belief, and a strategy they can take immediate action on.”)

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4. Emotional Experience (How you want them to feel)

Throughout and after the retreat, I want my participants to feel...

(Example: "Safe, seen, energized, empowered, and unstoppable.")

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5. Reputation & Word-of-Mouth (What they'll say afterward)

When the retreat is over, I want attendees to say...

(Example: "This experience changed me. I feel like I finally came home to myself.")

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PUT IT TOGETHER (Workshop Statement)

Use your answers above to craft a powerful Promise Statement:

This retreat will help participants (primary transformation) so they can (ultimate outcome) and walk away with (core takeaway) feeling (emotional experience) and saying (desired word-of-mouth).

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This statement becomes the Anchor of your retreat, your marketing, and your facilitation decisions.

PART 3: DESIGN THE EXTERNAL EXPERIENCE

The external experience is the container that shapes the internal transformation. Every sensory choice you make – the room, the flow, the pacing, the visuals, the environment – will either support or disrupt the breakthrough you want to create. Use this section to design an environment that amplifies your promise.

1. Experience & Production (Aesthetics, Mood, Emotional Arc)

The emotional experience I want to create through environment and flow is...

(Example: “Expansive, safe, soul-stirring, and energizing.”)

The aesthetic vibe or mood that best supports this is...

(Example: “Warm lighting, soft textures, intentional music, nature elements, and clean space.”)

2. Venue Alignment (Environment that matches the vision)

The type of location that best matches my retreat vision is...

(Example: “A peaceful retreat center in nature, not a sterile hotel ballroom.”)

3. Retreat Structure (Container + Timing + Energy)

My retreat structure will be...

W Number of days: _____

W Hours per day: _____

W Overall pacing and energy:

(Example: "slow and grounding in the morning, energizing mid-day, reflective at night.")

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PUT IT TOGETHER (Workshop Statement)

Use your answers above to create a clear design intention for your retreat environment:

The external experience of my retreat will be (vibe/mood) in a (venue type) environment, designed to make my participants feel (desired emotional experience) as they move through a (retreat structure) that supports lasting transformation.

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This statement becomes the Compass that directs the environment, flow, and experience you intentionally create for your participants.

BEFORE THE EVENT

Prepare The Participant Journey

Before your retreat ever begins, your participants are already in the experience. They are imagining what might happen, wondering who will be there, and silently hoping they made the right decision by saying yes. This phase is about **leading them before they arrive**, emotionally, energetically, and logistically. When you prepare your guests with intention, they don't just show up, they arrive **grounded, connected, and ready to transform**.

Your goal in the “before” phase is simple:

Reduce uncertainty. Raise anticipation. Build trust.

You are preparing a welcome their soul can feel.



PART 1: CLARITY & EXPECTATIONS

What They Need to Know Before They Arrive

To remove uncertainty and create safety, your attendees must know what to expect.

My attendees need to know...

(Example: What to bring, how to prepare, and what will be required of them)

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My attendees need to understand...

(Example: The flow, schedule, and structure so they feel grounded and informed.)

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My attendees need clarity around...

(Example: Logistics such as location, transportation, meals, timing, and environment)

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PART 2: EMOTIONAL REALITY & READINESS

What They May Be Carrying In Emotionally

Participants will arrive with emotional histories, fears, distractions, and transitions. You must plan to meet their hearts with intention.

My attendees may be arriving with...

(Example: Grief, stress, nerves, doubt, excitement, or overwhelm.)

My attendees need to feel...

(Example: Safe, welcomed, and emotionally supported before they walk in.)

My attendees need reassurance that...

(Example: Whatever they bring is welcome and will be held with compassion.)

PART 3: BELONGING & EARLY CONNECTION

How You Will Create Connection Before Day One

Belonging lowers defenses and accelerates transformation. Connection must begin before the retreat starts.

To build early connection, I will...

(Example: Create pre-event touchpoints, such as Zoom, a community space, or a personal welcome message.)

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My attendees need to feel...

(Example: That they're not entering a room of strangers, but a community they belong to.)

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I will foster belonging by...

(Example: Initiating shared interactions or introductions before arrival.)

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PART 4: SAFETY, VISIBILITY & SIGNIFICANCE

How They Will Feel Personally Seen and Valued

Participants transform fastest when they feel seen, known, and significant.

To help attendees feel seen, I will...

(Example: Personalize greetings or references from their intake or registration.)

To help attendees feel valued, I will...

(Example: Normalize nerves, speak to their humanity, and honor their presence.)

To help attendees feel safe, I will...

(Example: Establish emotional agreements, tone, or guidelines before Day One.)

PART 5: ANTICIPATION & ACTIVATION

How You Will Build Excitement and Emotional Readiness

Excitement opens the heart. Readiness opens the mind. You want both before they arrive.

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To build anticipation, I will...

(Example: Share a teaser exercise, playlist, or message that sparks curiosity and excitement.)

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To activate emotional readiness, I will...

(Example: Send a grounding practice, journal question, or pre-work activity.)

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My attendees need to feel...

(Example: Like something meaningful has already begun before they walk through the door.)

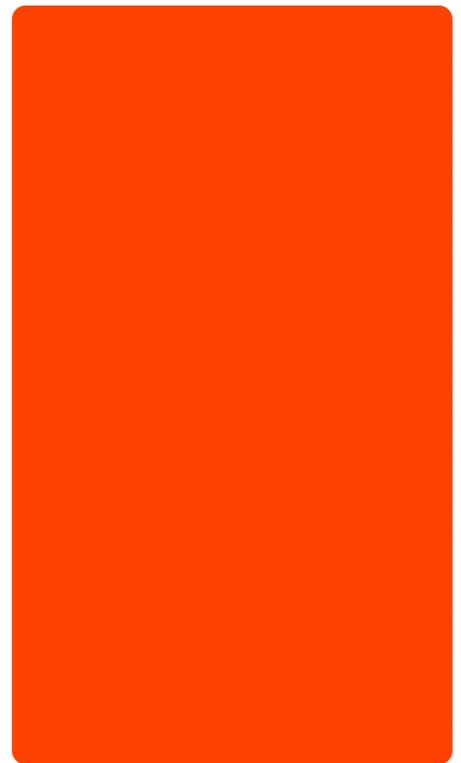
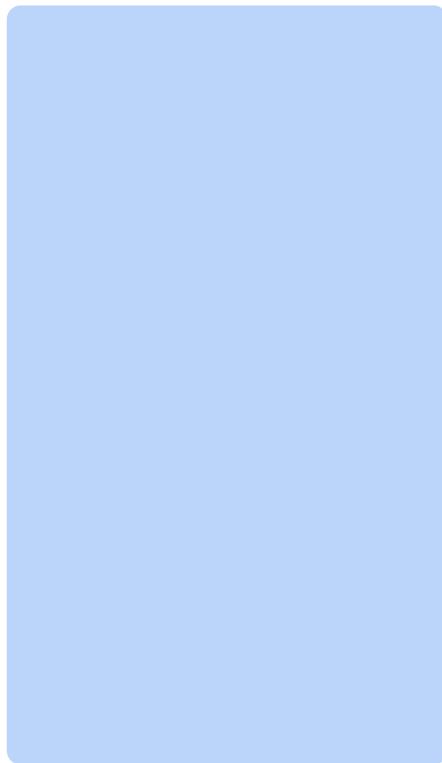
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DURING THE EVENT

Guide The Experience

Once your retreat begins, your role is to shepherd the room — emotionally, energetically, and experientially. Your job is not just to deliver content, but to hold the container, read the room, and guide participants through a journey that touches the mind, heart, body, and spirit. Use the prompts below to design how you will lead in the moment.



PART 1: OWN THE TONE (ENERGY CALIBRATION)

To lead the room, you must first lead the energy of the room. Each day has a rhythm, and you get to set it.

How will you set the emotional tone each morning so your participants feel grounded, welcomed, and ready to receive?

(Example: "I will open with music, breathwork, intention-setting, or a centering ritual that unifies the room.")

I will set the tone by:

How will you reset the energy when you feel it dip, spike, or disconnect?

(Example: "When energy drops, I'll shift state with movement, story, music, or a pattern interrupt.")

When the energy shifts, I will:

How will you create emotional completeness at the end of each day so participants leave settled, not stirred?

(Example: "I will close with reflection, gratitude, integration, or grounding exercises that land the day.")

I will close the day by:

PART 2: CULTIVATE CONNECTION & COMMUNITY (BELONGING + SAFETY)

Transformation accelerates in community. Your participants must feel safe, seen, and connected – not just to you, but to each other.

How will you build meaningful connection so no one feels alone in the room?

(Example: “I will use partner exercises, small group shares, and acknowledgment moments throughout the retreat.”)

I will create connection by:

How will you nurture emotional safety so participants feel free to be honest, vulnerable, and expressive?

(Example: “I will establish agreements, model compassion, uphold boundaries, and celebrate courage out loud.”)

To create safety, I will:

How will you foster a sense of ‘we rise together’ in the room?

(Example: “I will create shared rituals, group reflections, or collective wins we celebrate as one.”)

I will reinforce community by:

PART 3: DELIVER INTERACTIVE EXPERIENTIAL MOMENTS (ACTIVE ROOM)

Breakthroughs don't happen through passive listening. They happen through participation, embodiment, and engagement.

How will you keep your room active, not passive, every 60–90 minutes?

(Example: "I will add embodiment exercises, journaling, movement, or partner work to activate participation.")

To activate engagement, I will:

Where will you create moments of personal discovery instead of just information intake?

(Example: "I will use reflection prompts, hot seats, or coaching demos to turn insight into awareness.")

To create discovery, I will:

How will you involve the body and voice – not just the mind – in your teaching?

(Example: "I will incorporate breath, posture, sound, or movement exercises that support the content.")

To engage the whole person, I will:

PART 4: TEACH WITH TEXTURE (CONTENT FLOW & VARIETY)

A transformational room moves through the head, heart, and body. Texture keeps the nervous system open and the attention engaged.

Where will you teach, and where will you tell a story to move the heart?

(Example: "I will pair each key teaching point with a story, metaphor, or lived moment that brings it to life.")

I will use story here:

Where will you coach or facilitate instead of lecture?

(Example: "I will pause teaching to coach someone live when the room needs embodiment, not more information.")

I will coach here:

Where will you integrate emotion or embodiment so the lesson becomes lived, not learned?

(Example: "I will use music, visualization, or emotional processing after major content pieces.")

I will integrate emotion here:

PART 5: PROTECT THEIR FOCUS (PACING + NERVOUS SYSTEM CARE)

Breakthrough requires stamina. Protect their capacity by pacing with intention.

How will you support their nervous system with breaks, pacing, and emotional regulation?
(Example: "I will protect energy with scheduled breaks, breath resets, and emotional check-ins.")

To support their nervous system, I will:

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How will you prevent overwhelm, shutdown, or burnout in the room?
(Example: "I will adjust pacing, shorten segments, or shift energy when I see signs of overload.")

To prevent overwhelm, I will:

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How will you maintain attention and presence throughout your content?
(Example: "I will use voice variation, active transitions, and interactive elements to keep the room awake.")

To maintain focus, I will:

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PART 6 – CURATE THE ENVIRONMENT (SENSORY SUPPORT)

The room itself should participate in the transformation.

How will your room setup, lighting, and seating support the emotional journey?

(Example: “I will arrange the room for connection, soften lighting, and adjust layout as energy shifts.”)

My room environment will support transformation by:

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How will you use music, scent, or visual elements to shape emotion?

(Example: “I will use music to open hearts, lighting to settle energy, and visuals to reinforce the message.”)

My sensory elements will:

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How will you ensure that food, temperature, and space support energy – not drain it?

(Example: “I will guide meal choices, monitor temperature, and create space for movement and breath.”)

I will support physical comfort by:

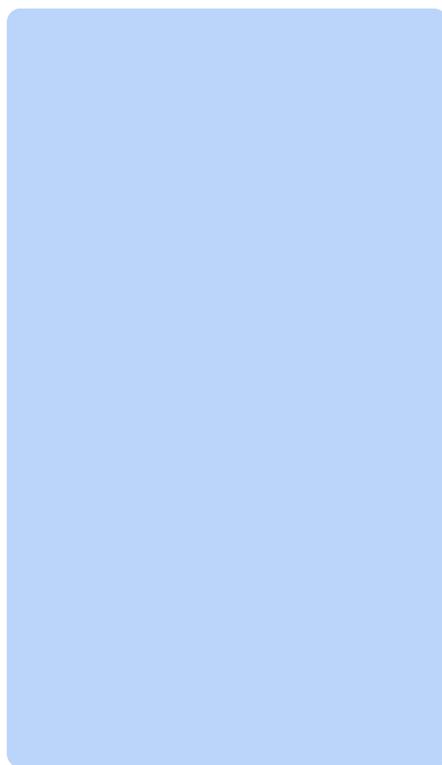
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When you lead with intention in every moment, your retreat becomes a container for transformation, not just a container for content.

ENDING THE RETREAT

Close With Completion, Grounding And Clarity

The closing of your retreat is just as sacred as the opening. How you land the experience determines how your participants leave the room, re-enter their lives, and **carry forward the transformation you helped unlock**. A powerful ending brings emotional completeness, strengthens community, and supports the journey that continues after the event is over. Use the commitments below to intentionally design your closing.



PART 1: SETTLE THE ENERGY (GROUNDING & EMOTIONAL CLOSURE)

You must gently guide participants from activation back into grounded presence so they leave regulated – not raw, overwhelmed, or wide open.

I will intentionally settle the energy so my participants leave grounded, regulated, and at peace – not open, raw, or overwhelmed, by:

(Example: “Slowing my pacing, using calming music, guiding breathwork, and leaving space for emotional integration.”)

I will intentionally create emotional closure instead of an emotional cliff by:

(Example: “Scheduling integration time after the final breakthrough rather than ending on a high and dismissing the room.”)

I will intentionally guide their nervous system into stillness before departure by:

(Example: “Ending with a visualization, guided reflection, or grounding ritual that settles their energy.”)

**PART 2: PUT AN EMOTIONAL BOW ON THE EXPERIENCE
(INTEGRATION & MEANING-MAKING)**

Participants need meaning, language, and personal reflection to own their breakthrough.

I will intentionally support emotional integration by:

(Example: “Giving space to journal, share insights, and name what shifted so they leave with clarity and ownership.”)

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I will intentionally end with depth – not rush or adrenaline – by:

(Example: “Placing my deepest processes before the final session so we have time to integrate them instead of rushing out the door.”)

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I will intentionally help participants claim the transformation they’re taking home by:

(Example: “Inviting them to speak their commitments, share their breakthroughs, or anchor their ‘new identity’ in community.”)

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PART 3: STRENGTHEN CONNECTION (COMMUNITY & BELONGING)

Connection amplifies transformation. The closing should deepen relational bonds, not dissolve them.

I will intentionally reinforce community by:

(Example: “Celebrating shared wins, acknowledging the group journey, or guiding a collective closing circle.”)

I will intentionally leave participants feeling seen and supported by:

(Example: “Offering acknowledgments, eye-contact moments, or partner reflections of who they’ve become.”)

I will intentionally close in a way that preserves the ‘we’ – not just the ‘me’ – by:

(Example: “Anchoring a group ritual or shared affirmation that bonds them beyond this room.”)

PART 4: SUPPORT THEIR RE-ENTRY (LIFE AFTER THE RETREAT)

Participants are returning to real life, real distractions, and real patterns. Prepare them for that transition.

I will intentionally support their re-entry by:

(Example: "Creating a post-retreat plan, accountability structure, or reconnection call to help them sustain momentum.")

I will intentionally equip them for challenges that may surface after the event by:

(Example: "Normalizing the 're-entry dip' and giving tools for grounding, integration, and continued progress.")

I will intentionally create a bridge between the retreat and their daily life by:

(Example: "Assigning small next steps, milestones, or follow-up practices they commit to once they return home.")

PART 5: INVITE NEXT STEPS (WITH INTEGRITY & WITHOUT FORCE)

**Your invitation should feel like alignment, not pressure. Serve first. Offer second.
Honor always.**

I will intentionally open the door to continued work – without force – by:

(Example: “Extending an invitation to deeper support, making the offer clear, and letting their ‘yes’ be empowered, not pressured.”)

I will intentionally make the next step clear and accessible by:

(Example: “Clearly communicating what the next container is, who it’s for, and how they can take the next step if it’s aligned.”)

I will intentionally honor their agency and sovereignty by:

(Example: “Trusting their timing, releasing attachment, and allowing the right people to choose the next step freely.”)



A Powerful Ending Is Not A Moment; It Is A Ministry Of Closure.

**When You Land The Experience With Grounding, Integration, Connection, Clarity,
And Choice, Your Participants Walk Away:**

Whole, Not Scattered

Clear, Not Confused

Seen, Not Invisible

Empowered, Not Dependent

Ready, Not Overwhelmed

**A Transformational Retreat Deserves A
Transformational Ending.**

Extend The Transformation & Sustain The Momentum

The retreat may end on the calendar, but the **transformation is still unfolding**. What you do after the event determines whether your participants experience a breakthrough that lasts or simply a beautiful weekend they talk about but never integrate.

This phase is about reinforcement, reconnection, and continued direction—so the work lives on in their habits, their hearts, and their future with you.

PART 1: GATHER INSIGHT (LEARN, REFINE, AND ELEVATE YOUR CRAFT)

Send an intentional follow-up to discover what resonated, what shifted them, and where you can grow as a facilitator.

I will gather insight by:

(Example: Sending a post-retreat survey within 48–72 hours to capture honest reflections and identify areas to refine.)

When will I send my follow-up survey or reflection request, and what is my deadline for reviewing it?

(Example: “Send within 72 hours; review within 7 days.”)

What do I want to learn from my attendees that will help me become a more powerful facilitator next time?

(Example: “I want to understand where they wanted more support, more time, or more clarity.”)

PART 2: CAPTURE SOCIAL PROOF (AMPLIFY THE TRANSFORMATION)

Testimonials are more than marketing – they are evidence of impact. Capture them while the experience is still alive in their spirit.

I will capture social proof by:

(Example: Requesting written or video testimonials from participants I didn't collect onsite.)

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Which breakthroughs, stories, or transformations do I specifically want to highlight for future retreats?

(Example: "Stories of confidence gained, fears released, relationships restored, or bold actions taken.")

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What is my plan to request, collect, and organize testimonials so they don't get lost or forgotten?

(Example: "Use a testimonial form and store all testimonials in a designated folder.")

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PART 3: CONTINUE THE JOURNEY (PROVIDE A NEXT STEP, NOT AN ENDING)

The work deepens when you give them structure, support, and direction. Every retreat should lead participants into their next chapter — not leave them in mid-air.

I will continue the journey by:

(Example: Sending a follow-up email that restates their breakthrough and clearly points to the next aligned step I seeded during the retreat.)

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What specific next step will best serve my participants' continued transformation?

(Example: "Join my 12-week coaching program, monthly membership, or private mentorship.")

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When and how will I deliver that next step so it feels supportive, timely, and aligned (not rushed or forced)?

(Example: "Send a follow-up offer email 48–72 hours after the retreat, followed by a private invitation.")

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PART 4: REINFORCE COMMUNITY (CONNECTION SUSTAINS BREAKTHROUGHS)

Transformation multiplies inside community. Keep them connected so the momentum—and identity they stepped into—stays alive.

I will reinforce community by:

(Example: Hosting a reunion or integration call within 2–4 weeks to reconnect, reflect, and reignite commitment.)

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How will I help participants reconnect with each other after the retreat so the bond, and momentum remains alive?

(Example: “Host a reunion call or create a small accountability pod for continued support.”)

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What ongoing rhythm or touchpoint will I commit to that nurtures the community without overwhelming me?

(Example: “A monthly check-in email, a quarterly group call, or a private community post.”)

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Success Stories



“I remember wondering if I should do NCF—could I even do it? Was it right for me? Would I really get the benefit out of it? I can tell you, it has over-delivered. Lisa and Sean gave me things I didn’t even know I needed. The biggest transformation was in myself. I’ve become a more confident speaker, and I’ve tried things I never thought I would. The camaraderie and family I’ve built through this journey have been amazing. I highly recommend it to anyone looking to up-level their business and speaking.”

-Char Fontanilis



“The distance between my head and my heart has become that much shorter. And I just feel like I’m a much happier individual because of it. I’m a much more certain individual. I certainly believe that who I am is the right person for the job that I’m doing for my clients.”

-Johnny



“If you’re waiting for a sign, this is it. Just apply—you’ll thank me later.”

-Michelle



Cherie comes from a corporate background where she has always been strong, confident, and self-reliant. But through this program, she uncovered hidden low self-esteem beneath her “confidence cape.” The program helped her embrace both strength and vulnerability, creating a safe space to show her true self. Now, she’s more present with her six sons, husband, and herself, and applies what she learns in real-time, transforming her life daily.

-Cherie

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