



EPISODE 222

How to Create Your “Total Immersion Weekend Retreat” to Clean Up Your Messy Business

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AMY PORTERFIELD: Hey there, welcome back to another episode of the Online Marketing Made Easy Podcast. I'm your host, Amy Porterfield, and at the time of this recording I just recently got back from a total immersion weekend retreat from my business in Palm Springs.

We stayed at the Parker Hotel, shout out to The Parker. You guys were amazing to us. Thank you so very much.

This was a very special weekend. Actually, it was just me and my integrator, Chloe. It wasn't a big weekend retreat for my entire team but it was something different.

It was different because we weren't brainstorming. We weren't thinking about what's possible and moving forward. We were actually cleaning up the messy stuff in our business.

For all of my B-School bonus members of 2018 you all know I created an entire stand-alone product just for you called Systems That Scale. I walked you through all of the systems of my business and showed you how we run a well-oiled machine.

I will say, not to toot my own horn but I'm going to here, we are a gold standard inside of my business for setting up systems and processes. We don't do everything right but we do systems right, for sure.

If somebody were to come into my business and look around they would say, "This looks pretty good. You guys are really organized. You have some solid systems and processes and you definitely are far beyond what most people's online businesses look like."



I would say, “You are right.” However, every single one of us inside of our businesses have those messy areas...at all times, to be quite honest.

What’s important is for you to identify those and not beat yourself up about them and not think you’re not cut out to be an entrepreneur or any of those crazy thoughts we sometimes have in our head. Instead we identify them and do something about them.

No matter how many great systems I have in my business and how much I pride myself on a really solid back end of the business there are still areas that I want to improve. That is why I went away for the weekend to clean them up.

I’m going to show you in this episode how you can do the same. I am telling you that you are going to feel so incredibly good after a weekend away. This is a staycation. You’re not going far. You’re not getting on a plane unless you want to.

It’s important that you take yourself out of your current environment and work on the messy parts. I’m going to walk you through how to identify the messy parts, how to structure your weekend, who you should take with you on your special weekend, and basically some of the pros and cons and what to look out for.

We’re going to get into all of it. But before I do I want to tell you what’s currently in my earbuds. This is something I’d like to do more often with all of you because I often get asked what kind of business books I read.

If you know me at all, if you listen to my podcast regularly, you know I like to mix things up with self help and some of the fun stuff as well as the business stuff. I’m not always only reading business books or I’d lose my mind.

Sometimes if I only read business books then I feel like there is all this stuff I’m not doing. Have you ever done that? You read a book and you are like, “Oh my gosh, there are ten things I should be doing that I’m not doing in my business.”

Now you’re overwhelmed. I like to read a business book, apply the strategies I want to apply, and then I’ll move on to the next one. Like I said, I mix some fun stuff between like Oprah’s Super Soul Conversations. I absolutely love those.

I mentioned those in a podcast, #220, when I was giving you my summer listening playlist.



The business book I'm reading right now, and when I say "reading" you all need to know I'm talking about audio books. That's pretty much all I do. I kind of cheat and sometimes buy the physical book if there is a lot I need to outline or highlight or underline or whatever.

If I want to really get into it I'm going to need the physical book but most times I am just listening to the audio book and taking notes as they come up with things I want to remember.

I am listening to [High-Performance Habits](#) by Brendon Burchard. I think I need to do a podcast episode about one area in this book that I want you all to pay attention to. I highly recommend the book.

I think it's a really good mix of self help and business strategy. It's all about being a high performer which is a perfect fit for why I did the total immersion weekend retreat in Palm Springs because I wanted to up my game.

These habits inside of this book are stellar. They are must know. You must know them as an entrepreneur and you must understand them and learn them and implement them.

I highly recommend you listen to the book [High-Performance Habits](#) because Brendon reads it. I'm always a fan of the author reading the book. You really get a good sense of who he is and what he's all about as well.

When you listen to an audio book you usually get extra tidbits that they don't include in the physical book. I always think that's fun.

Here's the deal. If you're not already using Audible it is my favorite business tool. It sounds like a weird business tool, right? But if you asked me my favorite business tool I'd say Audible because I'm constantly fueling my mind when I'm driving, when I'm walking Scout, when I'm cleaning the house, whatever it might be.

Here's what I want you to do. If you're not using Audible yet I want you to go to <http://Audibletrial.com/omme>. If you go there you will get your first audio book download for free and you'll get a 30-day free trial.

It's totally worth it. Get [High-Performance Habits](#) by Brendon Burchard and let me know on Instagram in the DMs what you think about it. I'm really active there so I'd love to hear from you.



Here's the thing, I want you to listen to a specific part, Chapter 4 (PFIs). I'm not even going to tell you what they are. If you've already read it you know it's good. But PFI inside of Chapter 4 on Audible is stellar. It's so good.

I want you to figure out your PFI. Right now I'm working on my current PFI but I'm not going to give it away. Go to <http://audibletrial.com/omme>. You'll get a 30-day free trial and you'll get your first audio book for free. You've got to love that, right?

That's the book that is currently in my earbuds right now. Shout out to Brendon. Fantastic book, friend. Brendon and I go way, way back when I was still working at Tony Robbins. It was the first time I had met him and I've always followed his career and what he's done. I think this is his best book yet.

Now let's transition into what the total immersion weekend retreat is all about and how you can create your own. I'm going to try to make this a short episode. I want to get right to the point. I know you're busy so let me break it down for you.

What is a total immersion weekend retreat?

As I mentioned earlier it's not a team retreat. I don't want you to take your entire team away for the weekend for this total immersion experience. Instead either do it alone or, if you have an integrator or project manager or right-hand girl or right-hand guy or someone that is your sidekick in the business, I would bring them along as well.

For me, I took Chloe, my integrator. In Episode #224 coming up in two weeks I'm going to take you behind the scenes and interview Chloe and you can see how I work with my integrator. It's a really cool episode. It's very different than anything I've done before. I think you'll love it.

For your weekend retreat either go alone or, better yet, bring a sidekick, someone that is a key player in your business.

I'm going to tell you what the weekend is not. It is not a big brainstorming session where you come up with tons of ideas and you get to be indulgent and think, "What's possible? What could we do? What do we want to do in one year? In five years?"

That is not what this weekend is all about. Instead this weekend is all about time to fix things, eliminate things, and make some shifts in the business so that you have a simpler, cleaner business moving forward.



As I already mentioned, we all have messy parts of our business. There is no way around it. If you're moving fast, if you're hustling, if you're making things happen there are areas of your business that are neglected.

Some of those areas can stay neglected but most of the areas are going to be important to your sales, to the impact you're making in this world, and to your overall message you're getting out there.

If there are some systems or processes or just things you do in your business that are weak or broken or there is a leak somewhere it's going to affect your bottom line and your overall wellbeing as a business.

The total immersion weekend retreat is time to clean things up. Let me give you a quick walk through of what it looked like for us. We left on Friday morning and returned Sunday afternoon around 3 p.m.

Palm Springs is about two hours from my house. We didn't go far. Think in terms of staycation because if you're traveling really far for this weekend that's going to distract you. Keep it really simple. Heck, if you've got a nice place that you love 30 minutes away choose that.

I'll talk about the location a little bit more later in the episode but the whole goal is that it's a staycation but you're getting far enough that you don't have any of the day-to-day distractions.

On the way up there we worked on our agenda. We talked about exactly what we were going to tackle over the weekend. Leading up to this we knew of some of the big broad strokes we wanted to dive into.

Now we solidified everything on the drive up. Friday we're going to work on "this", Saturday we're going to work on "this", and Sunday we're going to work on "this."

We allowed ourselves to make changes or be flexible as the weekend progressed because we knew we'd uncover some details or ah-ha moments that we wanted to address as well. Give yourself a little flexibility with that agenda and every morning reevaluate it.

When we got there we knew exactly what we were diving into for Friday afternoon until Friday evening.



That's basically what the weekend looked like and if you are tight on money you can definitely choose something that is within your budget. The Parker is super fancy. You do not need to do super fancy but I wanted to make it extra special because I definitely thrive on my surroundings.

I just wanted to kind of get out of my head and get into a really beautiful place that would encourage creativity and make me feel calm. That's why I chose such a fancy hotel but you do not need to do that.

Here's the most important part of this episode. I'm going to help you figure out what you would do on a weekend retreat with your sidekick or one person that is a key player on your team.

Here are the questions you want to ask:

- 1) What's your #1 pain point in your business right now?
- 2) What feels messy, broken, or painfully slow?
- 3) What needs to be fixed before you can grow?
- 4) Where are you losing money? Do you have any current leaks in your funnels or in any system you're using to make money right now?
- 5) What have you been putting off for way too long? What are the important things you've been wanting to get to but you know there are just not enough hours in the day? (That's a big one because as entrepreneurs we all have those things we keep saying we need to get to but you just never do. That's very normal).

I want you to think in terms of team, systems, processes, and funnels. For my beginners, the word "funnels" feels a little bit overwhelming at times. I just mean the different systems or strategies you have in place to get people to buy and to get people to join your email list and get them into your community. You can look at all of those as funnels.

Where is the messy? Again, no beating yourself up, we all have it. If you're curious as to what exactly we focused on in our weekend total immersion retreat, #1 we drilled down on calendars for me and for Chloe, my integrator.

The reason for that, we've always had a really good calendar system. However, for the last few months it's felt really messy. I keep saying "yes" to everything for some weird reason. I'm such an advocate of getting on the no train but sometimes I lose my way and I get a little overzealous.



I started to say “yes” to a bunch of things but then I was missing every deadline because there was not enough time on the calendar to do these extra projects I wanted to work on.

I also found myself working more nights or into the weekends and that’s not my favorite thing to do. Who likes doing that, right? I wanted to make sure I was using my time wisely.

We spent all of Friday drilling into specific projects, where they might fit on my calendar, and then talking about if they don’t fit on the calendar who should be helping me with them on the team.

I know it seems a little crazy that I spent four or five hours working on calendar stuff but it was a messy part of my business. You’ll find that as you drill down into a messy part of your business there are layers and layers and layers to it.

We didn’t just talk about chunks on my calendar of what I was going to do. We talked about whether this was the right thing I should be doing. Is this really in tune with my vision or aligned with my vision? Is this something we might need to put on the backburner for now?

We talked about a lot of the details about how I was spending my day and how I was spending my week. Because I was doing this with my integrator, an integrator really oversees so much of what the visionary is doing. If you don’t know what I’m talking about you will love episode #224.

We often joke that Chloe, my integrator, manages me. She was the perfect person to dive into all of the calendar stuff, all of the project stuff, and really get it cleaned out.

After Friday we made some decisions on what I was doing, what I wasn’t going to do any longer, and where I was spending my time during the entire week. That felt really good waking up into Saturday morning and moving into the next section.

After we did some of our calendar work we cleaned up our evergreen funnels inside of Infusionsoft. We have really elaborate funnels because we’ve been doing this for a while. Some of the things were broken in those funnels.

Some emails getting sent out had the wrong copy. We just recently transitioned from Webinar Ignition back to Easy Webinar. I’m a huge fan of Easy Webinar but a year or



so ago we decided to customize at a whole different level and Easy Webinar wasn't going to work for that level of customization I wanted for my evergreen funnels.

We switched to Webinar Ignition. This actually might have been two years ago. We realized we did so much customization that Webinar Ignition would not help us with things that were broken on the back end.

They said, "You've customized this too much. We can't help you." At that point we realized we didn't need that much customization." This was really labor intensive and with that we moved back to Easy Webinar.

Easy Webinar runs my automated webinars now and with that we took the time to clean up all of the emails and all of the different action points inside of our evergreen funnels so that it was all running smoothly.

Truth be told it was not fun. I actually hated that part of the weekend. It just took a lot of time. It hurt my brain. We had to think about "this" step and "that" step and getting inside of Infusionsoft can kind of make you go crazy. But it had to happen.

Evergreen funnels are directly related to my revenue and I needed to make sure they were clean and they made sense and were putting out the right information so we just took the whole morning on Saturday to clean up three different funnels inside of Infusionsoft for my evergreen webinars. That's what we did.

From there we got into the good stuff. I love working on projects and teams and who's doing what and talking about what "complete" looks like for each project and due dates and all that.

I think I should have probably in another life been a professional organizer because I love all of the organizing of projects.

For the rest of Saturday we talked about the projects we're going to work on moving forward, who was going to work on those projects inside of our team, and we just made sure we had the right people on the right projects.

With that discussion comes the other discussion of whether we are working on some things we should not be working on. That is so important and you will have that kind of discussion inside of your total immersion weekend as well.



For example, we were spending a lot of time working on sponsorship and affiliate deals for the podcast. There are some different products and programs I want to sponsor on the podcast but we needed to go after those sponsorships and work out a bunch of deals and all of this stuff.

It was taking forever. We were talking about the team member on the team that was doing that. She's a huge asset to the team and I thought I didn't want her spending as much time on that because she would be really valuable in this other area of the business where I know is directly aligned with my vision right now.

You need time to look at your players on your team and the projects they are working on and ask yourself if this is the best use of their time. We actually decided we weren't going to go after individual sponsorship for the podcast anymore. Instead we're going to work with a company that will do that heavy lifting for us.

Yes, the company (whoever we choose) will take a percentage of the sales we get with sponsorship on the podcast; however, it's definitely worth it to us because we have bigger goals related to bigger things in the business and I'm not in the sponsorship game. That's not a huge focus of my business.

These kind of things don't come to light unless you take the time to look at all of them. We really drilled in to making sure we're working on the right projects. We weren't thinking of new projects. I want to be really clear. We were looking at the current projects we're working on.

We looked back at my vision because I wrote out a vision for the next three months of the business, the next six months, and nine months, and all of that. We looked at just the next three months and asked if the projects our team is working on is aligned with the vision. Are they making us enough money?

I always go back to the revenue. Creating space for you to look at all of that is important. Here's the truth. Are you really going to take the time to look at that during a busy week when you're making videos, posting to social, doing webinars, and all of the other stuff you do in your business?

These things just don't happen organically in the business so I make them happen with a total immersion weekend retreat. The goal is that maybe you do one of these every quarter. We have another one coming up next quarter, for sure. We'll focus on totally different things.



If you continue to focus on the same thing every time you do a retreat you're not making progress so the goal is to focus on new stuff every single time.

One more thing that's not a bad idea to do when you wrap up your weekend immersion retreat is to look at the goals you've set for yourself whether you do yearly goals or 90-day goals and just take a look at where you're at right now.

Ask yourself if you're going to meet these goals. Maybe you want to do this a little bit earlier into the weekend because if not, as you're thinking about team players and projects and systems and things that are broken, you can tie them back to your goals.

I keep tying them back to your vision but you probably have very specific goals: Revenue goals, impact goals, whatever it might be. Tie in those goals as well and that makes it really, really extra valuable as you flesh everything out over the weekend.

A few things to think about, I hope I have you excited about the weekend, I know I talked about some stuff I didn't love doing over the weekend retreat but overall I loved the experience. The way you will feel driving home on Sunday afternoon, there's nothing like it for an entrepreneur.

You're going to feel solid in your decisions. You're going to feel like you're on the right track. You're going to feel a little bit lighter because when you clean up broken things in your business or sweep up the messiness you feel lighter and kind of like you have less weight on your shoulders.

I would love that for all of you because I know you're carrying a lot as your building your business.

Let me give you some tips to make it a really great total immersion weekend.

Your days are going to be long. We worked until midnight on Friday and we worked until about 9 o'clock on Saturday. We kind of hit a wall that I'll talk about in a moment, but your days are going to be long. This is not a total immersion weekend where you're taking long breaks and you're going to have some fun stuff built in.

That's a team retreat where you build the fun stuff in. That's not necessarily this weekend. If you bring a sidekick along I'm hoping you like the person you bring with you because Chloe and I laughed the entire weekend. We had fun. We enjoyed ourselves. We like working in the business.



It felt really enjoyable to me but it was also really intense so I want you to be ready for long days and long nights. That's what this weekend is all about.

We found little areas around the hotel to work at. We went to the hotel bar to do about two hours of work. We each had a margarita because, why not, right? We made it fun while we worked.

We went into the lobby and we sat there for a while. Then we went back to our hotel room and worked there for a while. We had to change our environment just so we didn't go stir crazy.

That is one thing I want you to do. I want you to get up, walk around a little, and shake it out. But you are definitely working a lot so make no mistake about that.

Take time to eat, of course, drink lots of water, and definitely get some fresh air. Chloe and I probably could have stopped a little bit more and went on some walks. But it was Palm Springs. We're talking 110 degrees so we didn't want to go outside and take walks. But if you're somewhere the weather isn't insanely hot like that or insanely cold, depending on where you're at, definitely go on some walks.

I think getting your body moving throughout the weekend is very important. And, make sure you do get the rest. We might have gone really late but we got eight hours of sleep each night and I think that part's important.

Zero distractions. The whole point of getting away for the weekend is so that you have zero distractions. You tell everybody in your family that is the goal. Hobie knew I wasn't going to be available a lot during the weekend. He knew this was all about work.

Of course I checked in but I didn't feel as though I was neglecting my family because this was planned. That is a big one for you, zero distractions. Even if you go 30 minutes from your house you are at least out of the house and you don't have to look at the laundry or walk the dog or anything like that. It's very important.

As I mentioned, have a little fun in the process. I think the next time I do it I'm going to end the weekend retreat with massages. We literally worked so hard that we kind of looked at each other in a daze come Sunday afternoon, probably a little too much.

Don't book a bunch of distractions. Although I don't want you to book a bunch of stuff and have distractions during the weekend just to make it extra fun, it doesn't



need to be extra fun but you don't need to kill yourself either. Booking massages at the end was a brilliant idea that I did not do but I will do next time.

Finally, choose a destination you enjoy and one that might inspire you. I know that if you're on a tight budget the Holiday Inn might just be the trick for this one. That's okay but as you start making more money in your business and you can put a little bit more into it choose a destination you love that makes you feel inspired.

The Parker was gorgeous. There's something about the nighttime in the desert. It's so calming and beautiful. I love going to Palm Springs. That worked really well. So does Chloe, so it worked well for both of us. If you can choose a place that inspires do it. Do not spend too much time or too much money in that area. You can still keep it simple.

Then finally, what I want to tell you is that when you get home make sure that all of the action items are moved into your project management tool. We use Asana. Make sure to schedule some time with individual team players or with your entire team to let them know about some of the decisions you made, some changes that might be coming down the pipeline, and what you discovered.

We had a meeting on Monday where we filled in the team. Then we followed up with another meeting on Thursday where we started to implement some of the changes we made over the weekend.

Be careful. You don't want to overwhelm your team but you do want to start implementing these ideas right away.

One thing Chloe and I did was open a Google doc. This is where I'm going to get really specific because you guys know I'm a huge Google Drive fan. We created a Google Drive folder called Weekend Retreat. We had a Google doc in there with a weekend agenda.

Each morning we would change it or tweak it a bit just to make sure we were on the right track but we both had the agenda. A good idea is to start the agenda early before the weekend.

You guys can collaborate on it and get it to a place you feel good, and then you can cross things out, which we love to do, and work inside of that agenda to make sure you're on the right track all weekend.



Another thing we did is start a Google doc in the same folder called Team Communication. As things came up we just did a rough outline of all of the stuff we wanted to remember to talk to the team about so they felt in the loop. That part's really important.

I knew going away for the weekend with just one person on my team could create problems if I didn't come back and communicate the whole experience and if I didn't explain to the team why I was just going away with Chloe and not making it a whole weekend retreat.

Quite honestly, talking about it now, I probably didn't do a great job of that because this was something new for me. That's another tip I'd give you. Before you go explain to the team why you're doing it and where you're going to focus.

Then, of course, come back and communicate with them how the weekend went. That was a big one for me. We had a Google doc. As things came up we just jotted it down in the team communication document so we remembered what we wanted to talk to the team about.

We had one more Google doc called Big Decisions. Any time we made a big decision that was a change to the current business we just jotted it down inside of that Google Doc as well just to kind of keep a running list that we had decided to do "this" or change "this" or whatever it might be. It was just helpful.

On the ride home we actually cleaned up the team communication document so that we'd be ready for the Monday morning meeting in terms of how we wanted to communicate about where we were going, the changes we made, and what we cleaned up.

I don't think you need to make huge decisions on this weekend retreat because really, remember, tying it all back as I wrap up, it's about cleaning up the messy. We all have it in our business. Some of the messy things in your business are costing you. They are either costing you time, effort, money, or your sanity.

Why not take a weekend to get away and clean it up? As you clean up the messy you're going to feel better, your team's going to feel better, and your business will run more smoothly.



When your business runs more smoothly you make more money. That, I can promise you so I'd love to see you clean up some of that messy on a quarterly basis so that you don't always feel like a hot mess.

So many of you tell me that you are a hot mess inside of your business. I want to tell you that most of us are. We all have the messy. Don't beat yourself up about it. Look at it as an opportunity. Do a total immersion weekend retreat and get that stuff cleaned up.

I hope you found this episode valuable. I know this weekend retreat was really valuable for us. We're definitely going to do it again. If you do it let me know. Jump into Instagram, DM me, tell me you're going to do it.

Better yet, here's a challenge for you. In the next 48 hours if this sounds like something you really want to do get it on the calendar. Choose a destination. Make your reservation. Put it on the calendar. Jump into Instagram and DM me and say, "Amy, I booked my weekend retreat. I'm doing it on 'this' date and 'this' is where I'm going."

The destination does not need to be spectacular. We can save that for another time. Don't worry about that part if you're not making tons of money just yet. That's not the important part.

I want to hear from you. Definitely let me know when your weekend total immersion retreat is booked. Okay guys, thanks so much for being here. I cannot wait to connect with you again next week.

Next week we have Pat Flynn talking about affiliate marketing. It's Episode #223. We walk through how to get start with affiliate marketing, the big mistakes most people make with affiliate marketing, and how to supplement your income with some really simple affiliate marketing strategies.

He is the master at this topic so I can't think of anyone else I would rather talk to so I'll see you next week as we dive into affiliate marketing with Pat Flynn. Until then make it a great week. Bye for now.