

MARKETING · SALES OPERATIONS · TECHNOLOGY

From First Inquiry to Final Closing.

A partnership proposal to serve as the in-house marketing, sales-operations and technology team for luxury residential, resort and master-planned developments, led by executives who have run these functions on Caribbean and U.S. projects.

Prepared for: [Developer / project name]

Caribbean · Puerto Rico · U.S.

Pre-construction to sell-out

1

ACCOUNTABLE PARTNER

8

INTEGRATED FUNCTIONS

100%

DEVELOPER-OWNED DATA

12

MONTH LAUNCH PLAN

This proposal does not make representations about pricing, returns, tax treatment or sales results. Project facts and targets are agreed with each developer during discovery.

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A Single Accountable Team, Built Around Your Sales Pipeline

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— Sources · One-page executive summary
(separate)

HOW TO READ THIS PROPOSAL

SOURCED

Market facts carry a numbered citation [n] that links to the source on the Sources page.

ASSUMPTION

Anything we have assumed, estimated or recommended is labeled. Illustrations are not forecasts.

PLACEHOLDER

[Bracketed fields] mark information the developer should supply before final pricing and targets.



Representative imagery. Each proposal is tailored to the developer's own project, market and materials.

01 · EXECUTIVE SUMMARY

One Partner Accountable for Demand, Follow-Up and Closings

Selling a phased, pre-construction luxury community is not one campaign. It is a multi-year pipeline in which buyers must be found early, educated patiently, followed up quickly and carried through reservation, contract, construction and closing. Most of the value is won or lost in that pipeline, not in the advertising.

The opportunity

Luxury and second-home buyers research online and expect a fast, informed human response: 52% of buyers found the home they bought online, and buyers rate photos, property details and floor plans as the most useful information^[3]. Luxury specialists report continued strength in cash purchases^[4]. Developers who start building a qualified, educated buyer list before each release, and who can prove which dollar produced which reservation, sell with more control over pace and price.

The problem we solve

Developers typically assemble a brand agency, a web vendor, a media buyer, a CRM consultant, event planners and brokers, then reconcile their reports by hand. Leads wait, follow-up varies, and no one can show which dollar produced which reservation. Fragmentation is most expensive before opening, when every qualified buyer matters most.

What we propose

Island Developer Partnership becomes the development's in-house **marketing, sales-operations and technology team**: one accountable partner, led by an executive director who has run investor relations, sales strategy, on-site operations and project management for a Caribbean luxury development. We build the brand, generate and qualify demand, run the CRM and follow-up, host private previews and discovery visits, and report every stage from first inquiry to closing. Licensed brokers continue to handle regulated brokerage activities; counsel, architects and the construction team keep their roles (Section 09).

START BEFORE OPENING

Buyer acquisition should begin ahead of construction milestones, so that a qualified, educated list exists when each phase is released, and early feedback can shape pricing, finishes and sequencing.

HOLD MOMENTUM

We keep buyers engaged through reservation, contract, deposit and construction with structured follow-up, updates and on-site experiences.

PROVE EVERY DOLLAR

A single CRM and attribution model connects marketing spend to inquiries, meetings, visits, reservations and closings, so budget moves toward what actually sells.

OUR RECOMMENDATION

Begin with a 4–6 week discovery and foundation sprint (brand narrative, CRM, website, buyer-qualification process, compliance review of claims), then launch demand generation and private previews, scaling spend only as conversion data proves which channels work. We do not promise a sales pace; we commit to building the system, reporting honestly and optimizing toward outcomes the developer defines.

02 · THE PARTNERSHIP ADVANTAGE

Executive Leadership That Has Done This Before

Luxury development is won or lost on relationships, sales operations and execution. Our team has led those functions on the ground in the Caribbean, and pairs them with the technology and data to scale them.

EXECUTIVE DIRECTOR

Krystalore Crews, MBA

Executive Director · Caribbean Luxury Real Estate Development & Strategic Partnerships

Krystalore brings direct, hands-on experience leading luxury real estate development in the Caribbean. In Roatán, Honduras, she assisted in **investor relations, sales strategy, on-site operations and project management** for a luxury real estate development, coordinating stakeholders and aligning strategic objectives with day-to-day execution.

A **22-year U.S. Air Force veteran**, Krystalore brings extensive experience in executive leadership, project management, communications, and organizational transformation. Her work spans leadership consulting, executive coaching, nonprofit leadership, global retreats, and large-scale events, uniting strategic planning with engaging experiences that move people to action. At the Pentagon, she **created and led a train-the-trainer program for more than 250 change agents**, equipping leaders to drive meaningful change. Across every role, she brings the energy, presence, and operational expertise to turn big ideas into lasting impact.^[1]

Having called Puerto Rico home for the past three years, she combines firsthand Caribbean development expertise with a personal connection to the island's lifestyle, culture and communities. This combination positions her to help a developer navigate the complexities of luxury development while creating a seamless experience for investors, prospective buyers, development partners and future residents.



Luxury Development & Project Management

Direct Caribbean development leadership and on-site operations.

Investor Relations & Sales Strategy

Investor engagement, relationship management and sales operations.

Executive Leadership & Strategic Communications

Military and government contracting, Pentagon organizational transformation and stakeholder coordination.

Destination Marketing & Community Engagement

Puerto Rico residency, international experiences and island-wide events reaching 2,000+ people.

GROWTH & TECHNOLOGY ARCHITECT

Jeff Cline

Growth & Technology Architect · Founder, R0cketShip and VRTCLS

- Serial entrepreneur: has launched dozens of companies, with multiple exits
- 25+ years of business development and scale growth
- Built 1-800-MEDIGAP's consumer program to 35,000+ inbound calls with known unit economics
- Architect of the Predictive Data demand engine: intent data, CRM, routing and attribution

THE UNIQUE PROPOSITION

R0cketShip × Predictive Data

Predictive audiences and demand infrastructure

- Predictive audience modeling and intent signals to find likely buyers early
- Visitor re-engagement, where consent and law allow
- Investor Discovery Tour hosted, qualified on-island visits^[2]

Role: feeds the pipeline with prioritized, consented prospects and reactivates past interest, so paid media is not the only source of demand.

02 · THE PARTNERSHIP ADVANTAGE · TRACK RECORD

Proven on the Ground, Not Just on Paper

We have already run the functions developers are looking to outsource: investor relations, sales strategy, on-site operations and project management, backed by growth experience across dozens of companies.

FEATURED

ROATÁN, HONDURAS

Roatán Caribbean Living

Jeff Cline, Krystalore Crews, and their team brought big ideas to life through strategic partnerships, investor relations, sales strategy, and on-site project execution. From leveraging predictive technology to identify high-intent investors and hosting biweekly investor experiences to activating public-private partnerships, the team connected vision with measurable action.

Their work included orchestrating a four-day, island-wide event engaging over 2,000 people, bringing together nonprofits, businesses, and sponsors in just three weeks.

One team. Bold vision. Real-world impact.

THE PENTAGON · U.S. AIR FORCE

Organizational transformation

A 22-year Air Force veteran, Krystalore created and led a Pentagon train-the-trainer program for more than 250 change agents, equipping leaders to drive meaningful change.

WORLDWIDE

Global retreats & large-scale events

Leadership consulting, executive coaching, nonprofit leadership, global retreats and large-scale events that unite strategic planning with experiences that move people to action.

TEXAS

50-acre multifamily community

Our team developed 50 acres into a multifamily community.

PUERTO RICO

One-for-many, already running

Retreats.plus, Cruise.plus, CrewPerk and our retreats — one-for-many platforms built and running in Puerto Rico on one proprietary technology stack.

GROWTH & EXITS

Dozens of companies launched

The team has launched dozens of companies with multiple exits, and built a consumer program to 35,000+ inbound calls.

WHAT THIS MEANS FOR THE DEVELOPER

- ♦ **One executive lead** who has managed investors, sales teams, operations and contractors on a Caribbean development
- ♦ **Stakeholder fluency:** public communications and multi-party coordination
- ♦ **Change leadership at scale:** training teams and partners so the program runs consistently

“Luxury buyers do not respond to more noise. They respond to the right invitation, a fast and informed answer, and an experience that makes the place feel like theirs.”

Executive Director, Island Developer Partnerships · International Project & Communications Strategist · CEO, Crews Beyond Limits · Revive & Thrive Retreats · Her Next Mission. Team credentials are drawn from our own materials and public profiles and can be substantiated on request.

03 · PROJECT POSITIONING

A Premium Position, Validated Before It Is Published

Every development needs a position buyers can repeat in one sentence. We build it from the product, the location and the buyer, then validate every claim with the developer before anything is published. The framework below is the starting point for discovery.

PILLAR	WHAT WE DEVELOP	WHAT THE DEVELOPER CONFIRMS
Lifestyle	The daily life the community offers, and the alternative it represents to nearby options.	Daily life on site; HOA services; rules for rentals and guests.
Design	Architecture, finishes and outdoor living, presented through plans, renderings and video.	Architect, finish schedule, options pricing, renderings vs. built product.
Location	Landmarks, access and drive times, described accurately ("on" vs. "nearby").	Exact distances, access paths, what is on vs. near the property.
Ownership	Title structure, currency and governance, explained simply.	Title, HOA governance, deposit and escrow terms.
Services	Security, concierge, home-watch and management partners.	Which services exist at launch vs. later phases.
Amenities	Shared amenities and their delivery by phase.	Delivery timing by phase; renderings permitted in ads.
Access	Air and road access for visitors and second-home owners.	Airport transfers for buyer visits; nearest services.

DELIVERABLE · BRAND PROMISE

One line that captures why a buyer should choose this community, tested with early prospects and brokers before launch. [Written in discovery]

DELIVERABLE · CLAIMS LIBRARY

Every fact used in marketing (prices, distances, amenities, dates, market data) is sourced, approved by the developer and, where needed, reviewed by counsel before it appears in an ad, page or presentation.



04 · TARGET BUYER SEGMENTS

Five Buyer Groups, Five Different Conversations

These are working hypotheses to test in the first 90 days, not market-size claims. Published data on luxury buyer origins is limited for most markets; segment weighting should come from the developer's existing inquiries and our early campaign data.

SEGMENT	LIKELY MOTIVATIONS	LIKELY CONCERNS	INFORMATION THEY NEED	BEST CHANNELS
Second-home buyers	A warm, easy-to-reach getaway; family time; a home that is ready when they arrive.	Hurricane resilience, insurance cost, upkeep while away, construction risk.	Floor plans, finishes, HOA services, insurance and flood-zone disclosures, build timeline.	Search, retargeting, broker referrals, video tours, hosted visits.
Luxury relocators	Lifestyle change, climate, community; some evaluate local tax incentives.	Schools, healthcare, services, legal and tax complexity.	Area guide, drive times, services map; tax topics referred to their own advisors.	Relocation content, webinars, partner advisors, private previews.
Investors	Presale entry, diversification, potential future use.	Resale liquidity, rental rules, carrying costs.	Ownership terms, HOA rental policy, factual market data. No yield promises (Section 12).	Investor-network events, broker channels, targeted email.
Multigenerational families	Space for gatherings; a shared family base.	Room counts, accessibility, safety, shared ownership logistics.	Layouts, rooftop and outdoor space, amenities for all ages.	Social video, community events, referrals.
Resort-lifestyle buyers	Amenities and a turnkey, managed feel without hotel rules.	Amenity timing, HOA fees, privacy.	Amenity schedule by phase, services, HOA budget.	Lifestyle content, influencer/press, preview events.
Local & diaspora buyers ADD	A family base or return home; local move-up buyers.	Value relative to local alternatives.	Bilingual materials and financing guidance.	Native-language campaigns, community partners.

WHAT THE RESEARCH SAYS ABOUT HOW THEY SHOP

Among U.S. buyers, 46% began their search online, 52% found the home they bought online, and 88% used an agent; buyers rated photos (81%), property details (77%), floor plans (57%) and virtual tours (38%) as very useful^[3]. Coldwell Banker's luxury specialists report continued strength in cash purchases^[4]. Our implication: invest early in floor plans, video and a fast, well-informed human response, and build a strong broker channel.



05 · SCOPE OF WORK

Eight Functions, One Integrated Operation

1 · BRAND STRATEGY & PROJECT NARRATIVE

- ✦ Discovery workshops; positioning and messaging architecture
- ✦ Name, tagline and voice guidelines (English and Spanish)
- ✦ Claims library: every fact sourced and approved before use
- ✦ Phase-by-phase story that keeps later releases fresh

2 · WEBSITE, COLLATERAL & BUYER MATERIALS

- ✦ Developer-owned website with gated floor plans and inquiry capture
- ✦ Coordination of renderings, video, drone and photography
- ✦ Interactive floor-plan and finish presentations
- ✦ Buyer guide, FAQ, process and disclosure materials (counsel-reviewed)

3 · DIGITAL DEMAND GENERATION

- ✦ Search, paid social and programmatic/retargeting
- ✦ Predictive audiences and consented intent signals (Section 06)
- ✦ Email nurture and content: area guides, build updates, owner stories
- ✦ Answer-engine and search-engine optimization for organic discovery

4 · LUXURY BROKER & REFERRAL PARTNERS

- ✦ Broker program design with the developer's licensed broker of record
- ✦ Broker portal: inventory status, materials, registration and protection rules
- ✦ Broker previews and familiarization trips
- ✦ Referral program for owners and professional advisors, where permitted

5 · PREVIEWS, EVENTS, VIRTUAL PRESENTATIONS & VISITS

- ✦ Private VIP previews and founders' events, hosted by Krystalore Crews
- ✦ Investor Discovery Tour visits: itinerary, hosting, logistics
- ✦ Live and recorded virtual presentations for remote buyers
- ✦ Scheduled site visits with a consistent presentation

6 · LEAD RESPONSE, QUALIFICATION & PIPELINE

- ✦ Response standard: first touch within minutes during set hours
- ✦ Qualification on timing, budget, financing and fit
- ✦ Appointment setting for licensed sales staff or brokers
- ✦ Pipeline management and weekly pipeline review

7 · BUYER FEEDBACK & MARKET INTELLIGENCE

- ✦ Structured feedback after previews and visits
- ✦ Objection and lost-reason tracking in the CRM
- ✦ Competitive and pricing watch across comparable communities
- ✦ Quarterly insight report to inform pricing and phase releases

8 · CLOSING COORDINATION & COMMUNITY

- ✦ Milestone communications from reservation through closing
- ✦ Coordination with the developer, lender, escrow and legal teams
- ✦ Construction-progress updates and owner onboarding
- ✦ Owner community programming and compliant referral engagement

Brokerage activities (negotiating price and terms, presenting offers, representing a party) remain with licensed professionals. Our team supports them with demand, qualification, scheduling, materials and data. Section 09 sets out the boundaries.

06 · TECHNOLOGY & PREDICTIVE MARKETING

A Practical Stack the Developer Owns

We recommend a straightforward architecture, built on established platforms where possible, with our predictive layer on top. Vendor choices are recommendations to confirm in discovery [developer preferences / existing systems].

CAPTURE

Website forms, gated floor plans, chat, event and tour registration

CALLS & TEXTS

Tracked numbers per channel; consent-based SMS

PAID & ORGANIC

Search, social, retargeting, email, SEO/answer engines

BROKERS & REFERRALS

Broker portal with registration and protection

DEVELOPER-OWNED CRM · SYSTEM OF RECORD

One record per buyer: source, consent, interactions, stage and documents.

ROUTING & FOLLOW-UP

Instant assignment, speed-to-lead alerts, automated email and text sequences, scheduling links.

PREDICTIVE LAYER

Audience models and intent signals score and prioritize prospects for outreach.

SCHEDULING

Meetings, virtual tours, site visits, previews

ANALYTICS

Web analytics, conversion tracking, call attribution

DASHBOARD

Monthly and live funnel reporting by channel and phase

HAND-OFFS

Broker, legal, escrow and closing status fields

HOW PREDICTIVE SIGNALS HELP

- ✦ **Prioritize:** score inquiries and audiences by fit and recent intent so people call the most promising buyers first.
- ✦ **Find look-alikes:** model new audiences on the profiles of qualified buyers and reservation holders.
- ✦ **Re-engage:** identify returning interest and trigger timely follow-up, within consent rules.
- ✦ **Reallocate:** shift budget toward channels whose leads progress to visits and reservations, not just clicks.

Predictive models improve with data; early-stage scores are directional and are validated against actual pipeline outcomes.

PRIVACY, CONSENT & DATA GOVERNANCE

- ✦ **Consent first:** documented express consent for calls and texts; honor opt-outs by any reasonable means within the required timeframes^[5]; CAN-SPAM-compliant email^[6].
- ✦ **Access controls:** role-based permissions, named users, audit trail, MFA.
- ✦ **Retention:** defined retention and deletion schedule approved by counsel; breach-response plan consistent with applicable law.
- ✦ **Fair housing:** audience and ad choices reviewed so targeting does not express preferences based on protected classes^[7].

OWNERSHIP COMMITMENT

The developer owns its **domain, website, CRM records, advertising accounts, analytics, creative and all project data**. We operate them under delegated access, and everything transfers in full at the end of the engagement.

07 · SALES FUNNEL & PERFORMANCE DASHBOARD

Every Stage Measured, Activity Kept Separate from Outcomes

Awareness reach, engagement	Inquiry form, call, event	Qualified buyer fit, timing, budget	Meeting virtual or in person	Property visit preview, tour	Reservation signed, deposit	Contract executed	Deposit per schedule	Closing deed, funded
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ACTIVITY METRICS · ARE WE DOING THE WORK?

METRIC	DECISION IT INFORMS
Inquiries by source	Which channels deserve more or less budget
Speed to first response	Staffing and routing; response speed strongly affects contact rates ^[8]
Qualification rate	Targeting and message quality
Meetings and visits booked/held	Sales capacity and event calendar
Cost per qualified buyer	Media efficiency, before sales outcomes exist
Broker registrations and activity	Broker program health

OUTCOME METRICS · IS IT SELLING?

METRIC	DECISION IT INFORMS
Reservations and contracts (by phase and unit type)	Pricing, release timing, inventory mix
Stage-to-stage conversion	Where the funnel leaks and what to fix
Marketing cost per contract	True acquisition cost; budget for later phases
Sales cycle length	Cash-flow and construction planning
Cancellations and lost reasons	Product, pricing and objection handling
Closings and attributed source	Success-fee calculation; next-phase plan

REPORTING CADENCE

Live dashboard for the developer's leadership; **weekly** pipeline call (hot buyers, upcoming visits, blockers); **monthly** performance report (activity vs. outcomes, spend, recommendations); **quarterly** strategy and pricing review with buyer feedback.

WHAT WE WILL NOT DO

We will not promise an absorption or sales pace. A defensible pace requires confirmed pricing, inventory release, budget and at least one to two quarters of conversion data. Once that data exists, we will propose targets jointly with the developer and report against them openly.

08 · PHASED 12-MONTH LAUNCH PLAN

From Discovery to Sales Acceleration

Timing is indicative and will be mapped to the construction and inventory-release schedule [developer to provide]. Each phase has a gate: we proceed when its milestones are met.

PHASE	DELIVERABLES	DEPENDENCIES	DEVELOPER DECISIONS	MILESTONES
1 · Discovery Weeks 1–4	Workshops; buyer and competitor review; existing-lead audit; claims library; compliance review list; measurement plan	Access to project facts, past inquiries, current vendors	Approved positioning direction; budget range; broker of record	Signed-off brief; KPI definitions; legal review scheduled
2 · Foundation & pre-launch Months 2–3	Brand system; website and gated floor plans; CRM, routing, call tracking; nurture sequences; broker portal; first content and video	Renderings, plans, pricing approach, disclosures	Final messaging; price presentation; reservation terms	Website and CRM live; consent flows tested; response standard in place
3 · Launch Months 3–5	Paid search and social; predictive audiences; private VIP and broker previews; first Discovery visits; PR outreach	Approved ad budget; event dates; sales staffing	Event calendar; visit incentives (counsel-reviewed)	First qualified-buyer cohort; first previews held; baseline conversion data
4 · Sales acceleration Months 6–9	Scale proven channels; monthly hosted visits; virtual presentations; referral program; construction-progress content	Inventory availability; construction milestones	Phase 1 release cadence; pricing adjustments	Reservations and contracts tracked by source; cost per contract known
5 · Optimization Months 10–12	Budget reallocation; pricing and product feedback report; Phase 2 pre-launch list and story	Phase 2 plans and timing	Phase 2 positioning and release date	Year-one review; Phase 2 waitlist; targets proposed from real data

IF CONSTRUCTION SLIPS

Shift budget from acquisition to nurture and owner communications; keep reservation holders informed; protect trust.

IF DEMAND OUTPACES INVENTORY

Build a priority waitlist for later phases; use demand data to inform release timing and pricing.

IF A CHANNEL UNDERPERFORMS

Reallocate monthly using qualified-buyer and visit data, not just clicks or lead counts.



09 · TEAM & OPERATING MODEL

Clear Roles, Clear Boundaries

ROLE	RESPONSIBILITY
Executive Director & engagement lead (Krystalore Crews)	Single point of accountability: investor relations, sales strategy, on-site operations, project management, stakeholder and press communications; leads VIP previews and Discovery visits
Growth & technology architect (Jeff Cline)	Business development and partnerships; CRM, routing, call tracking, automation, predictive layer, data governance, dashboard
Strategist & project manager	Positioning, plan, budget recommendations, milestone tracking, monthly reporting
Creative lead	Brand system, website, collateral; direction of renderings, video and photography vendors
Paid media & growth manager	Search, social, retargeting, audiences, testing, budget pacing
Buyer concierge / qualification	Fast first response, qualification, scheduling, nurture; bilingual coverage [hours to confirm]
Broker relations manager	Broker program, portal, previews, registrations, broker communications
Analyst	Attribution, dashboards, buyer-feedback and market-intelligence reports

WHO OWNS WHAT

PARTY	OWNS
Island Developer Partnership	Strategy, creative, media, technology, lead response and qualification, scheduling, events, pipeline operations, reporting
Developer	Pricing, inventory and release decisions, contracts, deposits and escrow, final approval of all claims and materials, ownership of all data and accounts
Licensed brokers	Regulated brokerage activities: representing parties, negotiating terms, presenting offers; broker compensation
Legal counsel	Contracts, disclosures, licensing and registration (including ILSA where applicable), securities and advertising review, tax-related statements
Architects & construction	Design, specifications, schedule and progress information used in buyer communications

LICENSING BOUNDARY

Real estate brokerage is regulated in every U.S. state and territory and in most countries, and is often defined to include promoting or negotiating sales in exchange for compensation. We do not perform regulated brokerage unless properly licensed. Where an activity could be brokerage, it is handled by, or under the supervision of, the developer's licensed broker. Counsel should confirm the boundaries for this engagement.

10 · COMMERCIAL MODEL

One Success Package, Aligned Incentives

One package — the complete in-house marketing, sales-operations and technology team — with fees that step down as sales come in.

SUCCESS PACKAGE · FULL-SERVICE

TERMS

Includes	All eight functions; monthly hosted visits; dedicated concierge; third-party agents and brokers as needed, all within one management system
Launch & setup	\$7,500 one-time — discovery, brand system, website, CRM and technology build
Monthly retainer	\$32,500 per month — strategy, marketing, sales operations, technology and reporting
Media & events	\$7,500 per month at the first tier; \$15,000 per month at the second — as needed and pre-approved. Additional spend goes toward activation dollars (events, previews and discovery tours).
Success fee	10% of total sales , paid quarterly, less the monthly retainers paid
Third-party agents & brokers	If third-party real estate agents or brokers must be paid, their fees come out of the 10% success fee as well

HOW THE SUCCESS FEE WORKS · HYPOTHETICAL EXAMPLE

A quarter with **\$3,000,000** in closed sales: 10% = **\$300,000**, less the quarter's three monthly retainers ($3 \times \$32,500 = \$97,500$) = **\$202,500**, less any third-party agent or broker fees required on those sales. Figures are illustrative, not a forecast.

REQUIRED REVIEW

Because compensation tied to sales can raise brokerage-licensing questions, the success fee is structured with local counsel to comply with licensing and real estate compensation rules. Paying it through, or alongside, the licensed broker of record is one option counsel may consider.

CONTRACT ITEMS TO AGREE

Attribution window & source rules

Existing leads & house list

Payment trigger (e.g., funded closing)

Cancellations & refunds

Term & renewal

Termination & transition

Data access: developer owns all data and accounts; full handover on exit

11 · DEVELOPER VALUE CASE

Why an Integrated Team Can Change the Economics

LESS FRAGMENTATION

One plan, one budget view and one point of accountability replace multiple vendors and hand-offs.

BETTER FOLLOW-UP

Response standards, routing and nurture sequences reduce the number of buyers lost between inquiry and meeting.

BETTER VISIBILITY

A live funnel shows the developer where buyers are, what they object to and which phases to release next.

SPEND TIED TO SALES

Attribution connects each marketing dollar to reservations and closings, so budget moves to what works.

How to evaluate the value: a formula, not a forecast

Marketing cost per closing = (setup fee amortized + monthly retainer × months + media and events + success fees) ÷ attributable closings

Pipeline value created = qualified buyers × visit rate × reservation rate × contract-to-close rate × average price

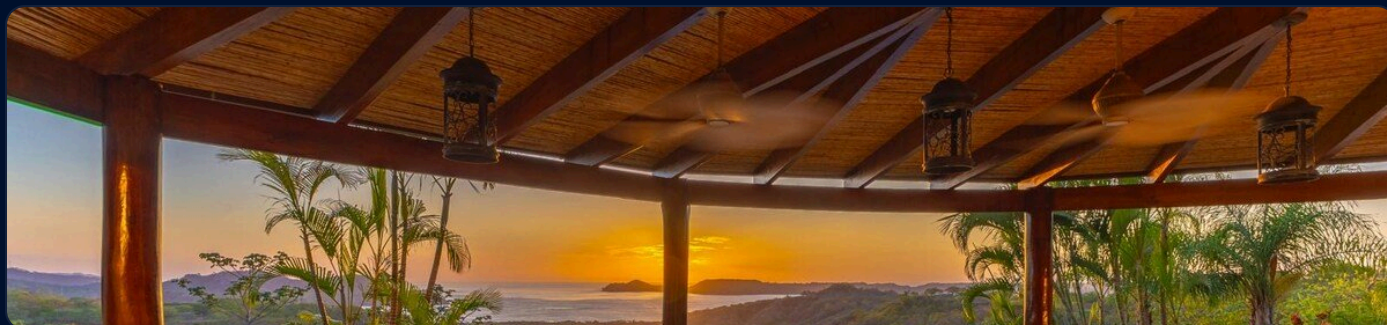
Value of better follow-up = additional closings from improved stage conversion × average price, minus the incremental cost of the program

ILLUSTRATIVE EXAMPLE · ALL INPUTS HYPOTHETICAL

HYPOTHETICAL INPUT	VALUE	HYPOTHETICAL INPUT	VALUE
Qualified buyers in a period	A = [e.g., 200]	Visit rate	B = [e.g., 20%]
Reservation rate from visits	C = [e.g., 25%]	Contract-to-close rate	D = [e.g., 90%]

Closings = A × B × C × D. With the bracketed example inputs: 200 × 0.20 × 0.25 × 0.90 = **9 closings**. If better follow-up raised the visit rate from 20% to 25%, the same formula gives about 11. These numbers only show how the levers interact.

They are not forecasts: real inputs come from the developer's data and our first 90 days of results.



12 · RISKS, ASSUMPTIONS & INFORMATION NEEDED

What We Need to Confirm Before Final Pricing and Targets

INFORMATION THE DEVELOPER SHOULD SUPPLY

Exact location, site plan, beach access	[confirm]
Unit mix, sizes, options by phase	[confirm]
Pricing, price-increase policy	[confirm]
Amenities and delivery timing	[confirm]
Ownership, HOA and rental policy	[confirm]
Construction schedule and permits	[confirm]
Sales team and broker of record	[confirm]
Buyer financing assumptions, lender partners	[confirm]
Advertising and events budget	[confirm]
Target opening and release dates	[confirm]
Legal constraints, approvals, disclosures	[confirm]
Available creative assets and rights	[confirm]

REVIEW NEEDS FOR COUNSEL (NOT LEGAL CONCLUSIONS)

- ✦ **Licensing:** who may promote or negotiate sales and receive contingent compensation in the project's jurisdiction.
- ✦ **Developer regulation:** developer licensing, escrow of deposits and advertising rules where the project is located.
- ✦ **ILSA:** registration or exemptions for multi-phase U.S. communities^[9].
- ✦ **Securities:** marketing rental income, rental programs or "investment" returns can raise investment-contract questions^[10].
- ✦ **Fair housing:** ad content and audience selection^[7].
- ✦ **Advertising:** truthful, substantiated claims^[11].
- ✦ **Privacy & consent:** TCPA, CAN-SPAM and local privacy and breach laws^{[5][6]}.
- ✦ **Tax statements:** any tax-incentive claims reviewed by tax counsel.

WHAT WE CHECK IN EXISTING SALES MATERIALS

- ✦ **Market statistics:** traced to their original source and quoted in the scope the source intended.
- ✦ **Tax and incentive claims:** current law and deadlines, approved by tax counsel.
- ✦ **Rental income:** short-term-rental figures and "investor" framing reviewed for securities and advertising risk^[10].
- ✦ **Location:** landmark and distance claims verified, and described as "nearby" where they are off-site.

13 · CLOSING & NEXT STEPS

Let's Build the Pipeline Before the First Release

Every luxury development has ingredients buyers look for. What it needs is a single team that turns them into a trusted brand, a steady flow of qualified buyers and a pipeline the developer can see and steer, led by people who have managed investors, sales, operations and projects on the ground. We would welcome a discovery meeting.

PROPOSED NEXT STEPS

1. **Discovery meeting** (90 minutes): goals, timeline, current team and vendors
2. **Information request:** the items on the previous page
3. **Site visit** hosted by our team
4. **Scoped proposal** with package, pricing and success-fee structure, after counsel review
5. **Discovery sprint kickoff** (Weeks 1-4)

DECISIONS NEEDED TO SCOPE THE ENGAGEMENT

- ♦ Success Package start date and media & events tier
- ♦ Broker of record and broker-program approach
- ♦ Year-one media and events budget range
- ♦ Success-fee basis and attribution rules (with counsel)
- ♦ Release timing and pricing presentation
- ♦ Existing systems, accounts and data to migrate

1

ACCOUNTABLE PARTNER

8

INTEGRATED FUNCTIONS

100%

DEVELOPER-OWNED DATA

12

MONTH LAUNCH ROADMAP

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SOURCES

Sources & Notes

- 1 Krystalore Crews: About
<https://krystalore.com/about>
- 2 Investor Discovery Tour
<https://investordiscoverytour.com>
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