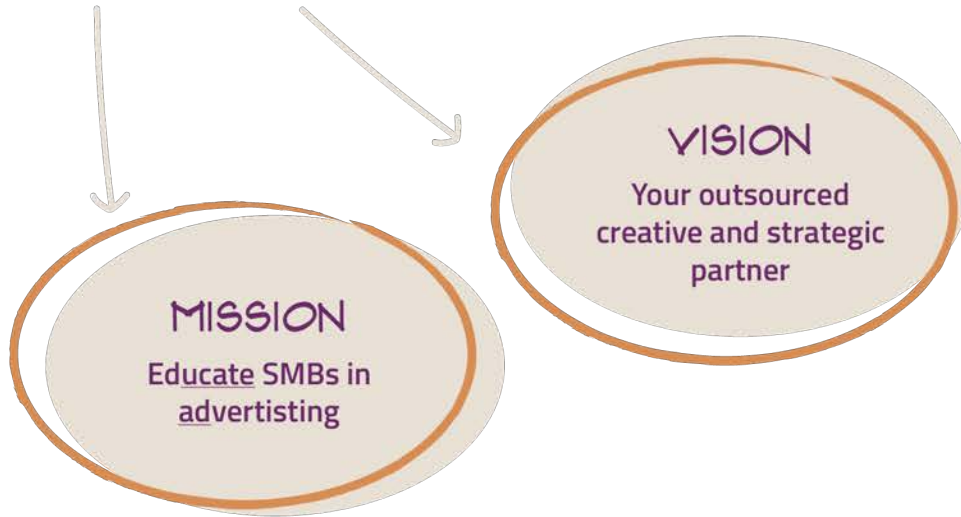


CASE STUDY GUIDING THE GROWTH



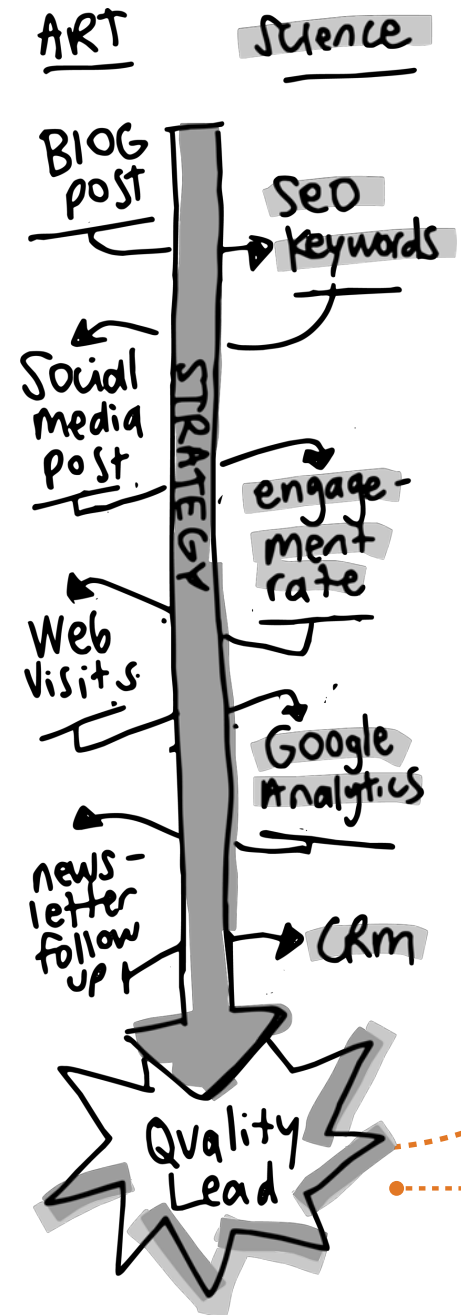
NEW LEAF HOMES

The Partnership



VALUES

STAY SILLY
AND GIVE A DARN!



The Partnership



NEW LEAF HOMES

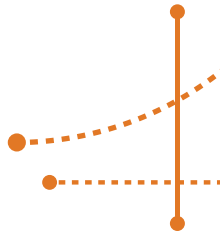
A family of conscientious community builders.

Serving active adults looking for a quality boutique home-buying experience in a luxury neighborhood.

EXPERIENCE ENRICHMENT IN A
THOUGHTFULLY CRAFTED COMMUNITY



EPCON[®]
FRANCHISING



Organizational Chart



Project Background

New Leaf Homes benefits from Epcon's resources but needs strong, local brand awareness.

Currently, its presence on the national Epcon website creates confusion.

Q3 2024 – Q4 2025

PHASE 04

Exceeding expectations

Q3 2023 – Q3 2024

PHASE 03

Refine the brand
Refine the process

Q2-Q3 2023

PHASE 02

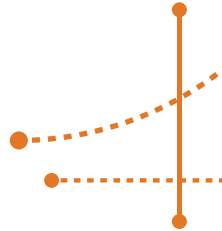
Separate Identities
Create data trackers

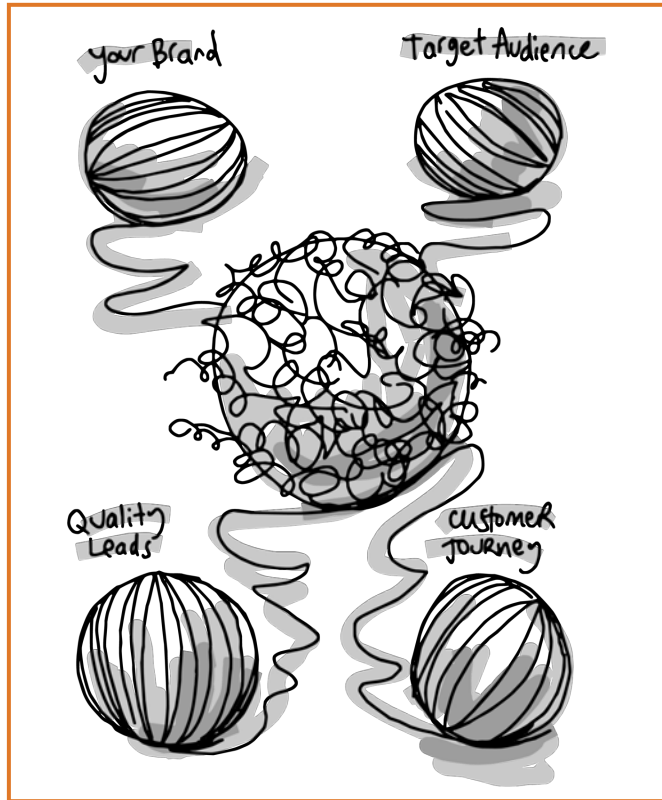
Q1 2023

PHASE 01

Landscape Analysis
Onboarding

The challenge is to strengthen New Leaf's unique, family-owned brand while remaining within the Epcon ecosystem.





PHASE 1 SOLUTIONS

Landscape Analysis & Onboarding February 2023 – April 2023

- Zoom out to zoom in
- Marketing Audit
- A/B Testing Content Marketing

THE BIG PICTURE

How can New Leaf Homes remain within the Epcon ecosystem while preserving its unique identity?



The Story Brand



The Character

An active adult ready to right size in a low-maintenance connected community.



Has a Problem

Uprooting life is scary, time-consuming, and costly.



Who Meets a Guide

We are a boutique team of conscientious community builders.



That Gives Them a Plan

We don't sell homes; we meet your needs.



And Calls Them to Action

Experience enrichment in luxury living



While Avoiding Failure

Life is for living. Don't spend it fretting over an outdated furnace.



And Ends in Success

Find pride in your property and connection to your community.

The Story Brand Strategy



THE NEW LEAF HOMES HERO

"I want to have pride in my property and connection to my community. But uprooting my life is scary, time-consuming, and costly."

WHO WE ARE

New Leaf Homes is your trusted and grounded home building partner.

We TIE the complex home building process together with Transparency, Integrity, and Empathy.

Experience the enrichment and security you need to sprout a new leaf.

(New Leaf Home Storybrand Framework)

Branded Content

New Leaf Homes Brand Guide

2023

Primary Logo



Black and White Logo



Square Logo



Social Media Profile Image



Primary Colors



Navy

19, 33, 72
100, 90, 39, 44
#132148



Sienna

33, 59, 96, 20
33, 59, 96, 20
#96632A



Light Steel Blue

209, 217, 225
17, 9, 7, 0
#D1D9E1



Midnight Blue

28, 57, 95
97, 81, 37, 27
#1C395F



Dark Slate Grey

58, 63, 71
74, 64, 53, 44
#3A3F47

Accent Colors



Red

207, 92, 46
0, 56, 78, 19
#CF5C2E



Orange

212, 142, 79
0, 33, 63, 17
#D48E4F



Light Blue

70, 180, 218
65, 10, 7, 0
#46B4DA



White

255, 255, 255
0, 0, 0, 0
#ffffff



Cool Grey

119, 131, 147
58, 43, 32, 3
#778393

Fonts

Heading: Lora, Bold

ABCDEFGHIJKLMN**OP**QRSTU**VW**XYZ
 abcdefghijklmnopqrstuvwxy
 0123456789

BODY: Montserrat Regular

ABCDEFGHIJKLMN**OP**QRSTU**VW**XYZ
 abcdefghijklmnopqrstuvwxy
 0123456789

DIY Home Inspection Checklist



Prioritize Your Time. Is your home showing signs of age? Is your furnace or roof ready to be replaced? What's the true cost to stay in your current home? Moving may feel daunting, but maintaining a mature home can be costly in the long run. Use this DIY home inspection checklist to gauge the condition of your home.

Note: this checklist is for personal use only. It should not be used in place of an official inspection and may not be comprehensive.

Exterior	Condition	Age	Est. Cost to Repair/Replace
Back Doors			
Deck, porch, patio			
Doorbell			
Driveway			
Front Doors			
Garage Doors			
Garbage Bins			
House Number			
Mailbox			
Outdoor Lights			
Paint & Trim			
Siding			
Sidewalks			
Traffic Noise			
Windows			

Roof	Condition	Age	Est. Cost to Repair/Replace
Chimney			
Gutters			
Downspouts			

Garage	Condition	Age	Est. Cost to Repair/Replace
Cieling			
Doors			
Floors			
Lights			
Storage			
Walls			
Windows			

Fireplace	Condition	Age	Est. Cost to Repair/Replace
Blockages			
CO ₂ Detector			
Mantle			
Soot			
Tiles			

Yard	Condition	Age	Est. Cost to Repair/Replace
Drainage			
Fences & gates			
Retaining wall			
Shed			
Sprinklers			
Swimming pool			



Experience enrichment with thoughtfully crafted communities. Connect with New Leaf Homes to learn more.



For More Information:
sales@newleafepcon.com

Phase 1 Final Report

RENTING VS OWNING

Renting Brand from Epcon

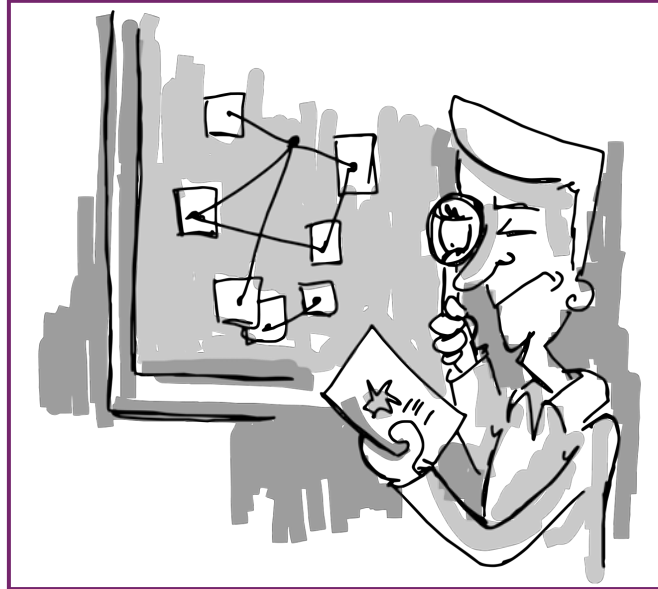
- ✓ Access to a lot of resources, network, community.
- ✗ Flood of info, no actionable advice; lost in the crowd.



Owning Your Brand

- ✓ Control your data, clearer ROI; lean into the "boutique" builder identity.
- ✗ SEO starts over and will take time to build up.





THE BIG PICTURE

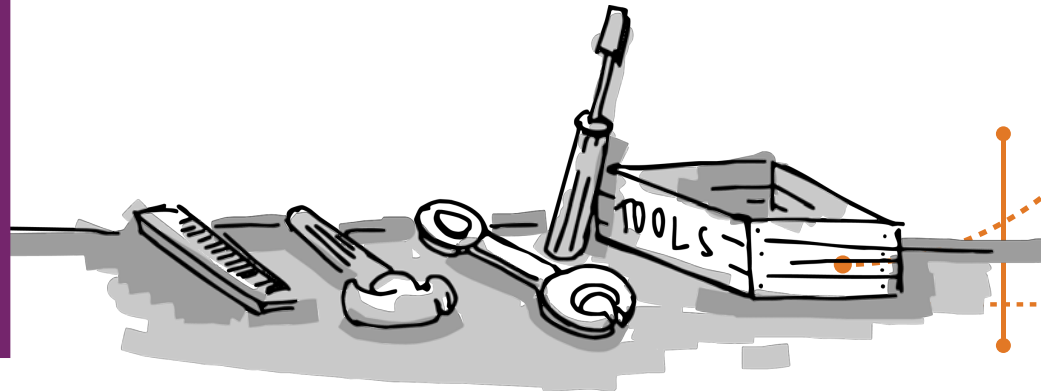
We have a clear understanding of what's working, what isn't, and where we want to go.

What steps do we take to get there?

PHASE 2 SOLUTIONS

Capture Clear Metrics March 2023 – October 2023

- Data-Driven Decisions
 - Weekly Meetings
 - Project Plans
- Separate Identities
 - Squarespace Website



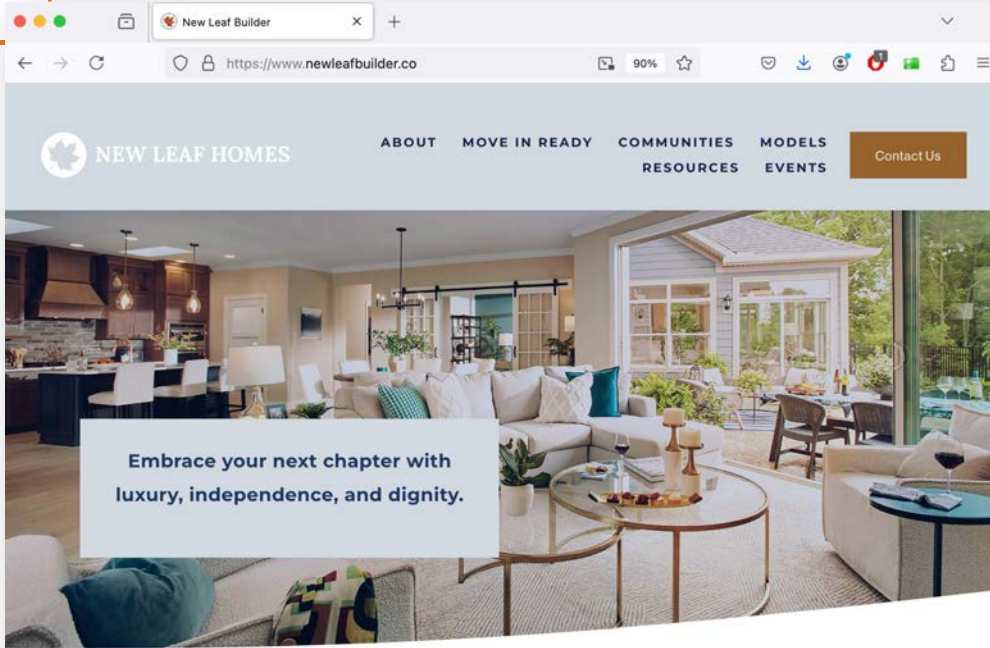
Defining *Our* Customer's Journey

Epcon's Resources

WEBSITE	https://www.epconcommunities.com/find-your-home/communities/ohio/akron--canton/summit/fairlawn/retreat-at-rosemont
SOCIAL MEDIA	National branding, ambiguous local awareness
NEWSLETTERS	No ability to add tracker to website
KPI ANALYTICS	Which page is the data coming from?
PAY-PER-CLICK	Business Suite managed by Epcon. No ability to add pixel tracker.
SEO	Pulling data from an old GMB listing.



Simple Squarespace Website



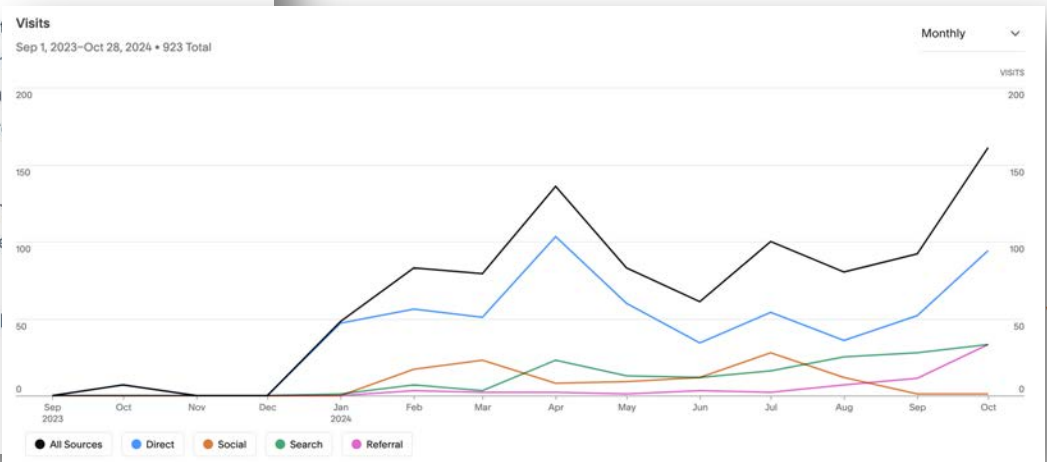
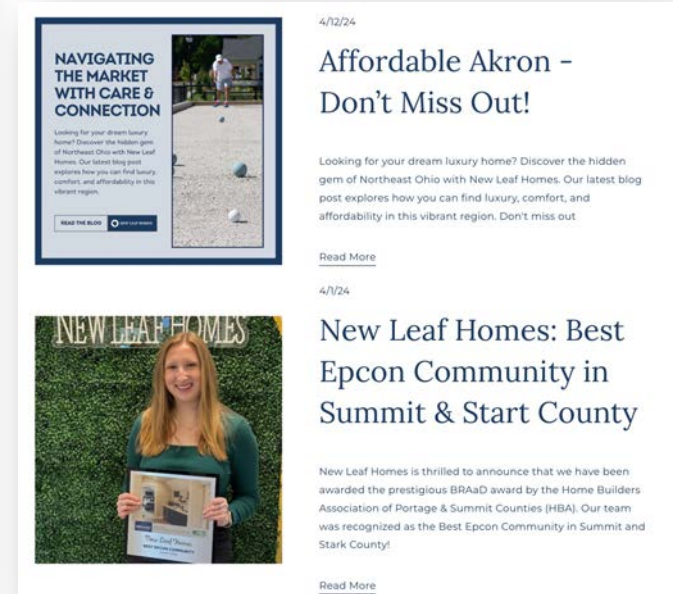
New Leaf Homes & Development

Experience Enrichment in a thoughtfully crafted community. New Leaf Homes is your boutique home building partner. We TIE together with Transparency, Integrity, and Empathy. We understand that your home is more than just bricks and mortar; it's a reflection of your unique personality and aspirations.

Our commitment to quality craftsmanship and attention to detail ensures that each home is a masterpiece, meticulously designed to cater to your needs and preferences.

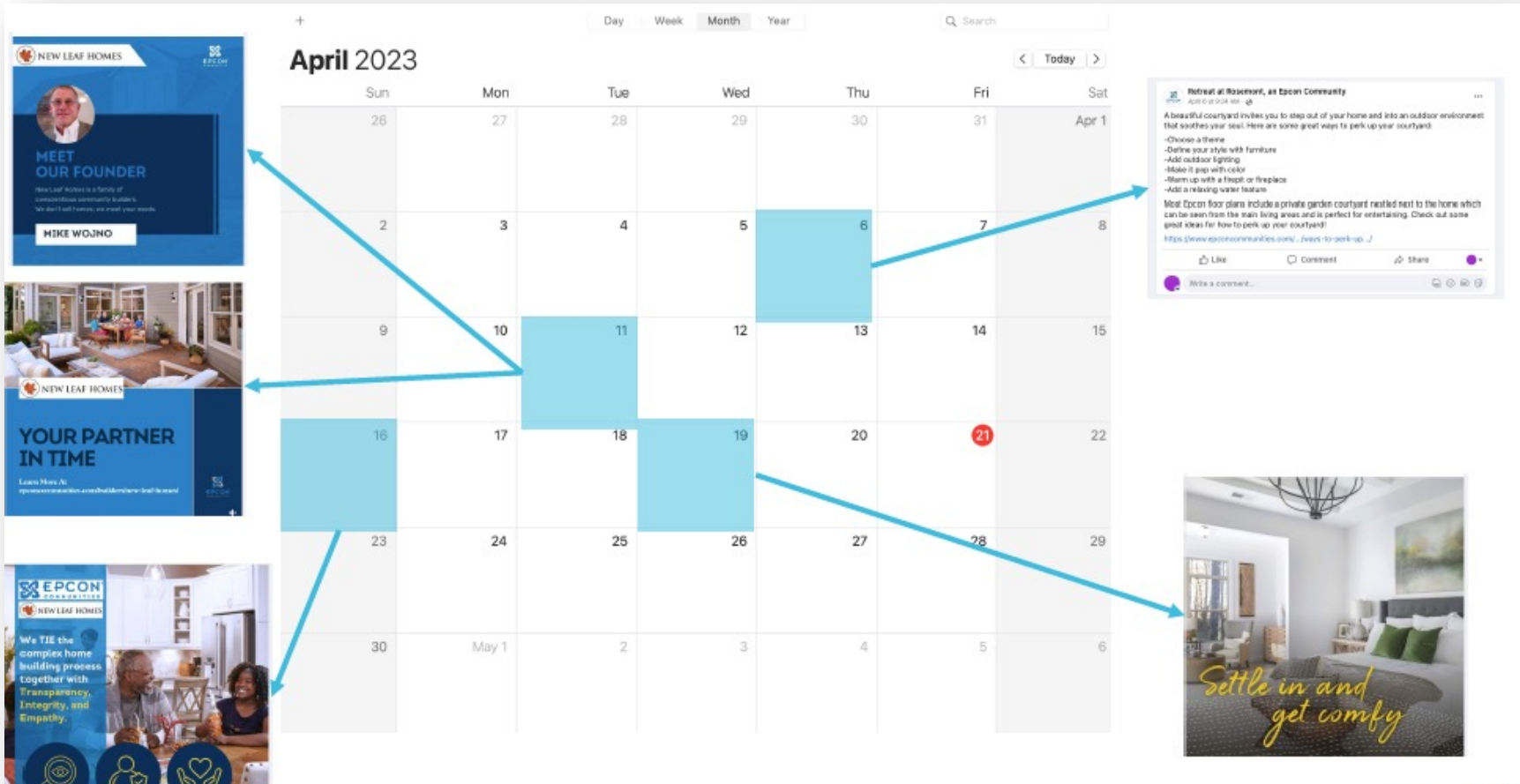
Reach out to New Leaf Homes today, and let's start building your future.

[Learn more](#)



Project Plans & Content Calendar

Facebook Pixel Tracker



Z13

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z AA AB AC AD AE AF AG AH AI AJ AK

PIPELINE

Number of Leads	Conversion Rate	Previous Mo. Leads	Current Mo. Leads
91		15	23

Interactions by Month

Month	Walk In	Other	Referral	Phone	Epcos Web	Facebook	Realtor	Email	Friend	Phone Call
2023 December	13	1	0	0	0	0	0	0	0	0
2024 January	1	1	10	1	0	0	0	0	0	0
2024 February	9	1	4	3	2	0	0	0	0	0
2024 March	3	1	1	1	0	0	0	0	0	0

SOCIAL ORGANIC

Avg Eng Rate - FB	Ave Eng Rate - IG	Ave Eng Rate - LI
14%	44%	7%

Facebook Follower Growth

Month	Follower Count
1/2024	3
1/15/24	12
1/30/24	15
2/15/24	18
2/28/24	20
3/15/24	25
3/28/24	27

Instagram Follower Growth

Month	Follower Count
1/2024	2
1/15/24	4
1/30/24	5
2/15/24	6
2/28/24	7
3/15/24	10
3/28/24	11
4/10/24	13
4/22/24	13
5/5/24	10
5/19/24	10
6/2/24	10

LinkedIn Follower Growth

Month	Follower Count
1/2024	21
1/15/24	42
1/30/24	44
2/15/24	46
2/28/24	48
3/15/24	50
3/28/24	52
4/10/24	54
4/22/24	56
5/5/24	58
5/19/24	60
6/2/24	62
6/16/24	64
6/30/24	66
8/2/24	70

PAY-PER-CLICK

TOTAL AD SPEND	AVERAGE AD SPEND	AVG. COST PER CLICK
\$406.79	\$40.68	\$9.72

Reach - Organic vs. Paid

Date	Sum of Paid Reach	Sum of Organic Reach
1/6/24	3880	40
1/13/24	1061	12
1/20/24	3631	962
1/27/24	548	312
2/3/24	312	312

number of leads from paid ads

OPPORTUNITIES

Avg Days - Lead	Avg Days - Appointment	Avg Day - Closed	Avg - Total Cycle
137.5	70.38	8.714285714	94.28571429

Opportunites by Stage

Appointment	5
Closed	7
(blank)	

Likely to Convert

High	50%
Medium	50%

SOCIAL PIPELINE

reach > website visits from social > form fills > appts



THE BIG PICTURE

We're a small but highly capable team. How do we effectively put that strength to work as we continue to grow rapidly?

PHASE 3 SOLUTIONS

Refining Processes & Brand November 2023 – October 2024

- Process Refinement
 - 2024 Marketing Strategy
 - Metrics Reports
- Brand Refinement
 - Wordpress Website
 - Visual Assets



2024 Marketing Strategy



NEW LEAF HOMES

2024 Marketing Strategy

Prepared by
Nicole Kurtz
330.780.9139
nicole@aducatedigital.com



Initiative 1

Sell remaining inventory of The Retreat at Rosemont by attracting ideal clients
Goal: Sell 1-2 homes per month in 2024



Initiative 2

Increase sales pipeline by attracting quality leads
Goal: 8 inquiries per month (form fills, phone calls, walk-ins)

Initiative 3

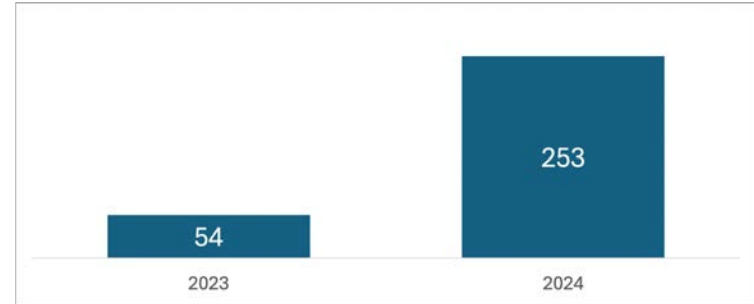
Distinguish New Leaf Homes' identity within local community and online
Goal: Gain 50 followers on each New Leaf Homes Branded Social Channels

Initiative 4

Set a strong SEO foundation for New Leaf Homes online presence
Goal: 200 website visitors per month, 60% bounce rate



Average 25 interactions per month



Average 80 site visitors per month

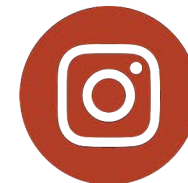
VISITS	BOUNCE RATE	UNIQUE VISITORS	PAGEVIEWS
915	53.5%	635	2.3K
+12,971% yr/yr	+25% yr/yr	+8,971% yr/yr	+13,981% yr/yr



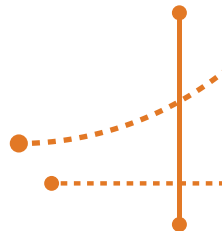
86 Followers



175 Followers



15 Followers



Quarterly Newsletter



APRIL-JUNE 2024

NEW LEAF LIVING

LET'S BUILD TOMORROW, TOGETHER

NEW HOME MAINTENANCE TIPS

LUNCH AND LEARN SPRING SERIES



VOL. 2

NEWLEAFBUILDER.CO | 440.447.0227 | SALES@NEWLEAFBUILDER.CO

Pioneering Excellence in Home Construction

Discover the visionary leader behind New Leaf Homes' commitment to excellence. Brad Petzinger, Director of Construction, brings over three decades of expertise to our team.

With a passion for quality craftsmanship and a dedication to customer service, Brad ensures that every home reflects the unique aspirations of its owners.

Join us as we delve into Brad's journey and his unwavering commitment to creating exceptional living spaces.



In the realm of home construction, the name Brad Petzinger stands as a beacon of excellence and innovation. With a career spanning over three decades, Brad has carved a distinguished path in the industry, earning accolades and admiration for his unwavering commitment to quality craftsmanship and visionary leadership.

As the Director of Construction at New Leaf Homes, Brad brings a wealth of experience and a profound passion for creating exceptional living spaces. His journey began with a simple yet profound dedication to building homes that transcend mere structures, embodying the unique personalities and aspirations of their owners.

At New Leaf Homes, we understand that your home is more than just bricks and mortar – it's a sanctuary where cherished memories are made and dreams are realized. From the initial design phase to the final touches, Brad and his team are dedicated to ensuring that your vision becomes a reality.

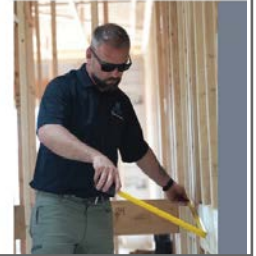
One of the defining features of New Leaf Homes is our unwavering dedication to customer ser-

vice. We understand the concerns and priorities of our discerning clientele – from worries about property upkeep to the desire for high-quality, future-proof homes. Brad and his team address these concerns head-on, leveraging their expertise to create homes that exceed expectations and stand the test of time.

Central to our success is our network of local partnerships and collaborations. By working closely with trusted professionals who share our values, we can deliver homes that not only meet but exceed the highest standards of quality and craftsmanship. From sustainable building practices to innovative design solutions, we're committed to creating homes that enhance your quality of life while minimizing environmental impact.

But Brad's impact extends far beyond his role as Director of Construction. He embodies the values and ethos of New Leaf Homes, fostering a culture of integrity, collaboration, and excellence. His dedication to "doing the right thing" for our customers and commu-

nities is evident in every decision and action he takes, ensuring that your journey with New Leaf Homes is nothing short of exceptional.



I love to find unique design features that reflect each homeowner's individual style.

- Amy Shirey



all. Whether she's creating spreadsheets or helping with clubhouse upkeep, Carly's passion for our projects is evident. In her spare time, she enjoys country music concerts, reflecting her lively and engaging personality.

The contributions of women like Katie Lancianese, Amy Shirey, and Carly Conrad are driving change in the home building industry. At New Leaf Homes, we are proud to be part of this positive trend, offering luxury, comfort, and community to our clients. We look forward to continuing to build not just homes, but lasting relationships and thriving communities.

Looking Ahead to a Bright Future

Looking ahead, the real estate market in Northeast Ohio is poised for growth, with promising trends emerging in the Great Lakes region. This area is becoming increasingly attractive to homebuyers seeking a blend of natural beauty, vibrant communities, and economic opportunities. The Great Lakes region offers a unique combination of urban amenities and scenic landscapes, making it a desirable place for active adults to settle down.

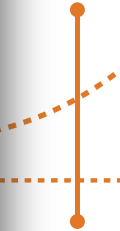
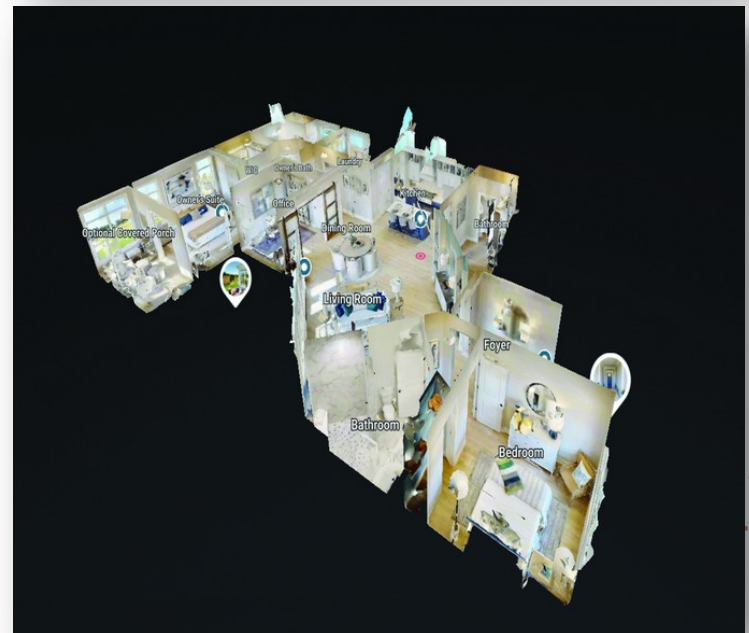
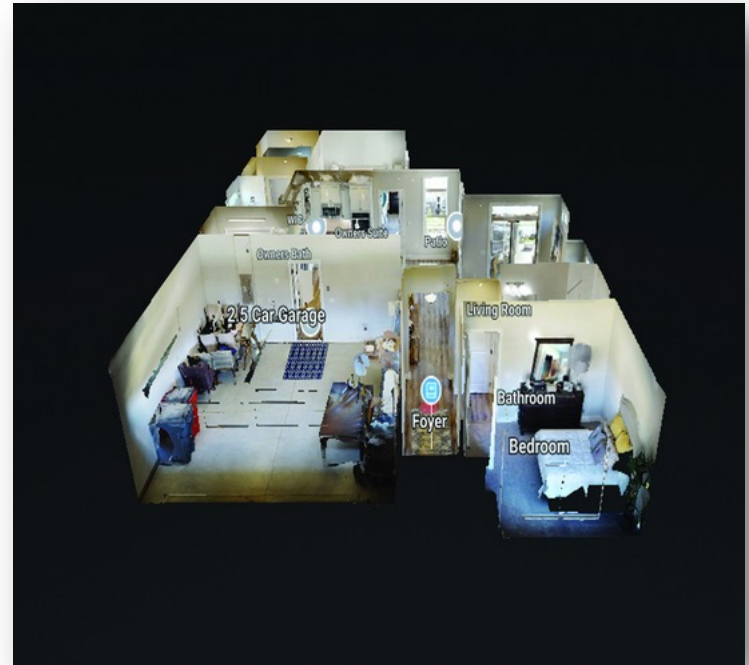
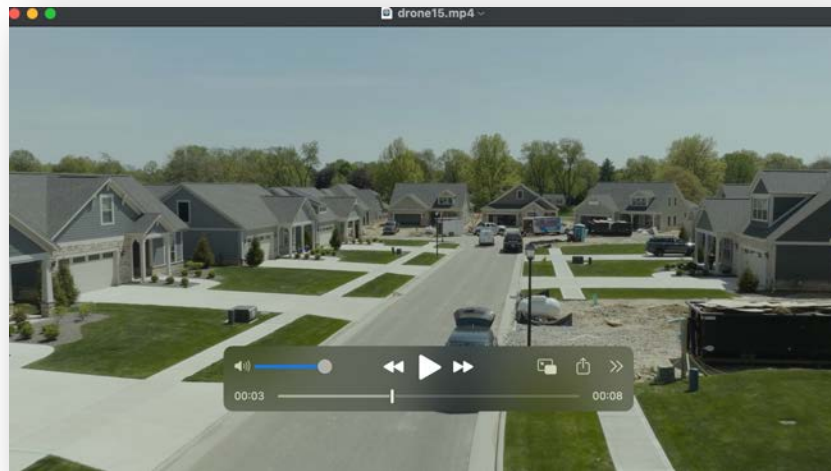
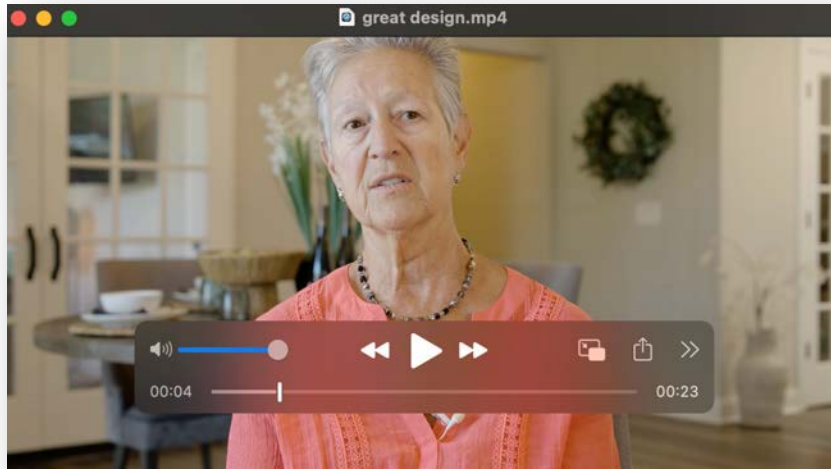
At New Leaf Homes, we are not only part of this growth but also leading the charge, breaking barriers and setting new standards in the in-

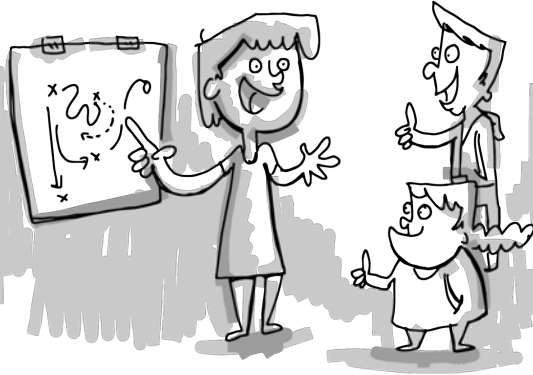
dustry. Our team of strong, dedicated women is at the forefront of this change, driving innovation and excellence in homebuilding.

By creating luxurious, comfortable, and community-oriented homes, we are meeting the evolving needs of our clients and demonstrating that women can lead and excel in this traditionally male-dominated field. Our focus on quality craftsmanship and exceptional service aligns perfectly with the desires of the active adult segment, ensuring they enjoy the best that Northeast Ohio has to offer.



Video & 3D Model Assets





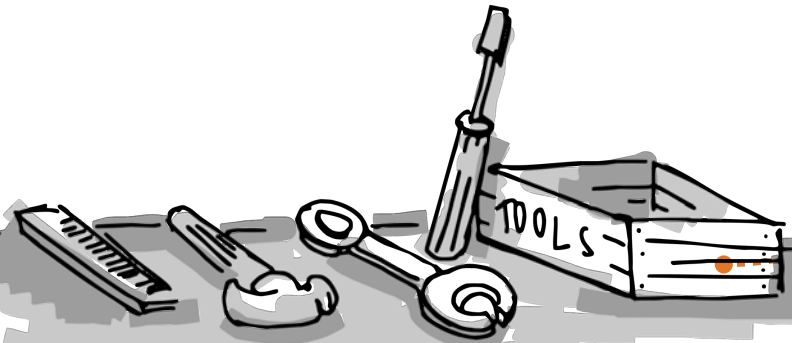
THE BIG PICTURE

How can we maintain our commitment to quality service while scaling and broadening our offerings?

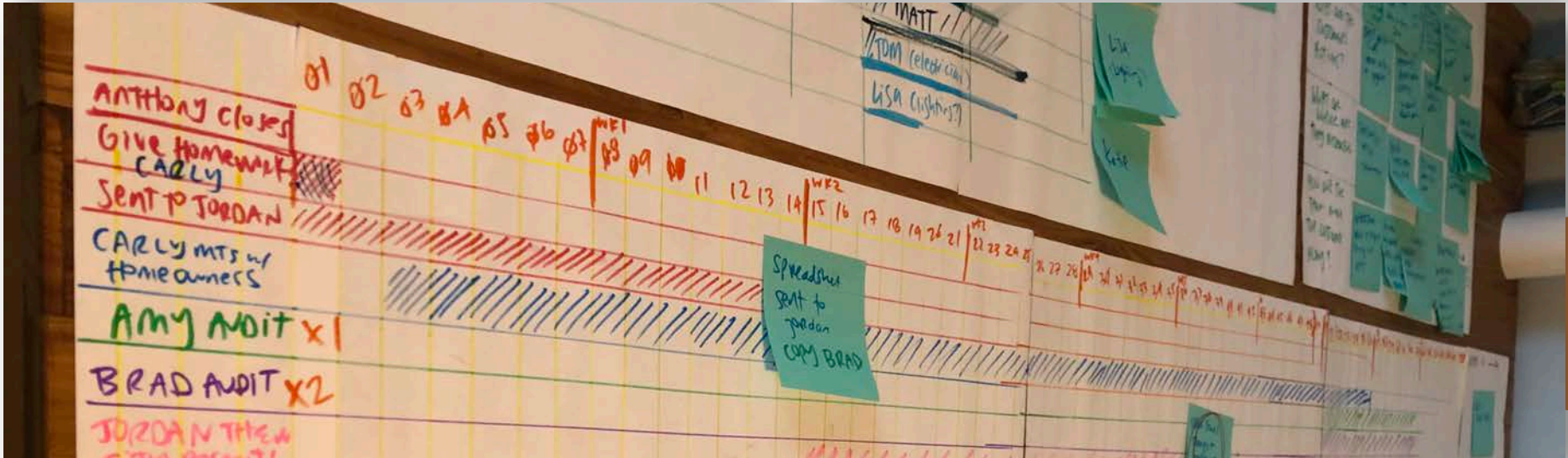
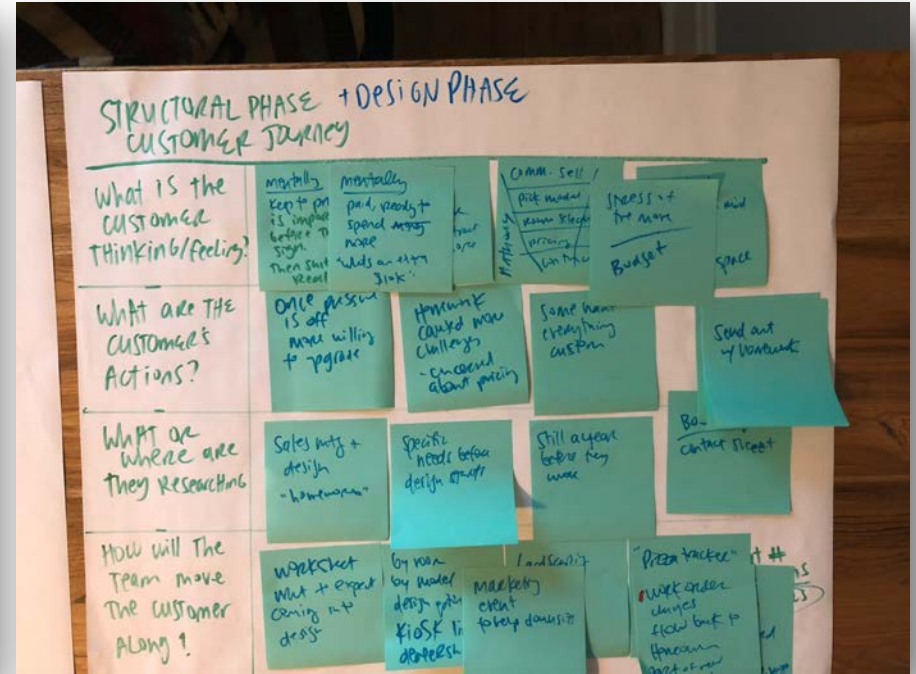
PHASE 4 SOLUTIONS

Exceeding Expectations November 2024 – December 2025

- Mapping the Customer Journey
 - Day one Marketing
 - Sales and Design
 - Production
 - Final Turnover and HOA



Process Meeting



MARKETING PHASE

1

Strangers

2

Referrals & Leads



Nicole Lead

Digital Marketing
Print Marketing
Epcor Awards



Amy Lead

Sponsorships
Referral Appreciation
Local Outreach
Charity Events



Carly Lead

Final Push Rosemont
Lunch & Learn Series
Cobblestone Promo



Anthony Lead

Move MQL to SQL
Move into production

2025 PROJECTS AT A GLANCE

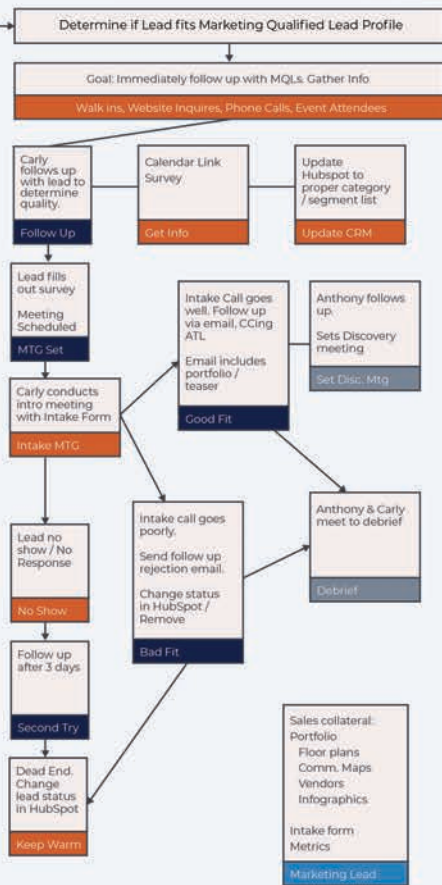
JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Cobblestone	Cobblestone	Cobblestone	Cobblestone	Q2 Local Outreach Event (Reservation Night)	Cobblestone
Mimi Article	Q1 Local Outreach Event (Mastermind Event at H2)	Direct Mailer Campaign	Sponsorship: Prep for Medina Marathon	Q2 Local Outreach Event (Reservation Night)	Medina Square Farmers Market
Email Campaign	Lunch & Learn (Storage Facilities)	Cobblestone Signage	Email Campaign	Q2 Local Outreach Event (Reservation Night)	Email Campaign
UTour Tutorial for Website Epcos Awards Deadline	Q1 Homeowners Testimonials	Q1 Community Newsletter	Welcome Packet Portfolio Community Choice Awards	Q2 Homeowner Testimonials	Q2 Community Newsletter
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Cobblestone	Cobblestone	Cobblestone	Cobblestone	Cobblestone	Cobblestone
Q3 Local Outreach Event (Mastermind Event)	Direct Mailer Campaign	Charity Event Copley Schools Photo Op	Medina Square Farmers Market	Sponsorship: Light Up Medina	Q4 Local Outreach Event (ShayDel Design)
Lunch & Learn Event	Email Campaign	Summit County Fair	Parade of Homes	Lunch & Learn	Email Campaign
Graphic: Flowchart Bridge Loan	Q3 Homeowner Testimonial	Q3 Community Newsletter	2026 Marketing Strategy	Q4 Homeowner Testimonials	Q4 Community Newsletter

Anthony Lead
 Amy Lead
 Carly Lead
 Nicole Lead
 Misc.

SALES PHASE

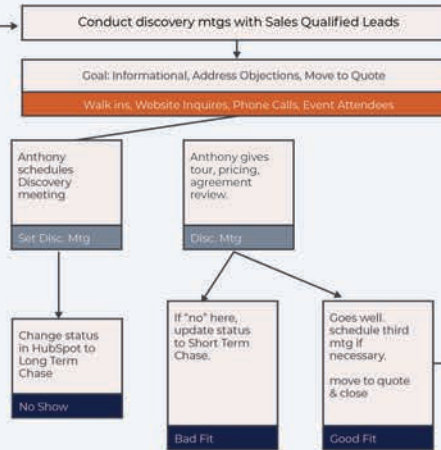
3

Marketing Qualified Lead



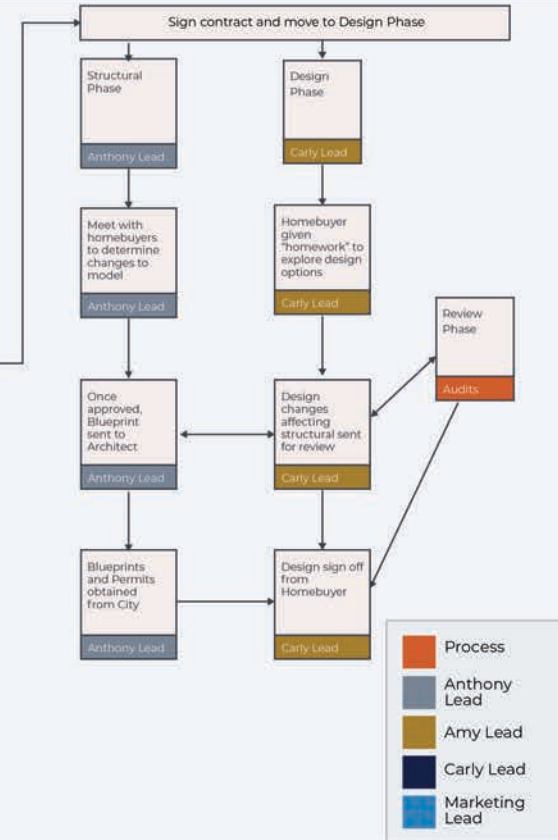
4

Sales Qualified Lead



5

Homebuyer



- Process
- Anthony Lead
- Amy Lead
- Carly Lead
- Marketing Lead

PROJECT CYCLE

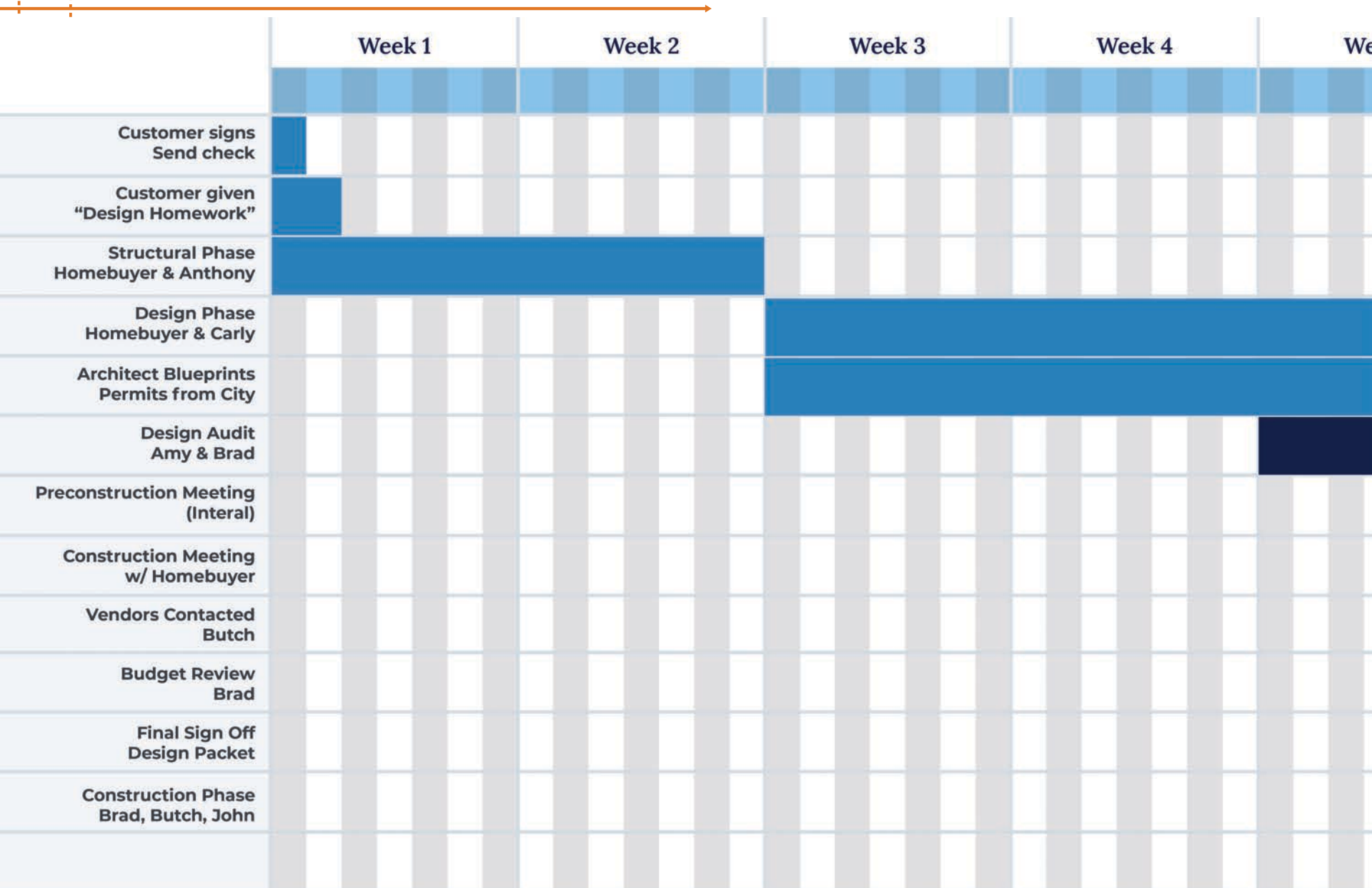
Marketing & Sales

Pre-Construction

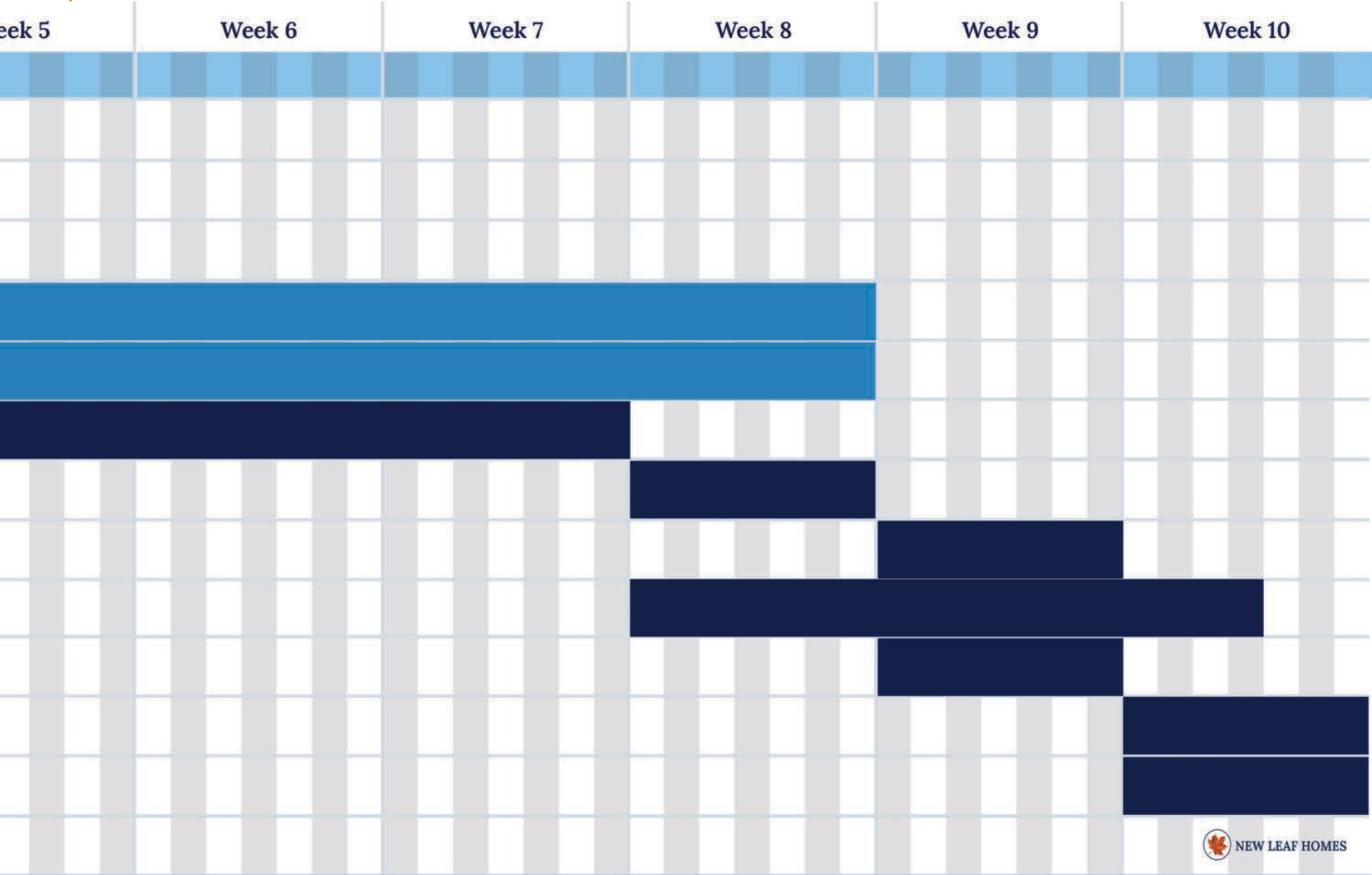
Construction & Close



Customer Journey



Customer Journey

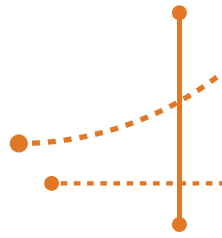


The Customer is the Hero

THE CUSTOMER EXPERIENCE

	Awareness Stage	Consideration Stage	Decision Stage
What is the customer thinking and feeling?	"I need to keep to my price point."	Paid and ready to spend more. "What's another \$10,000?"	"Check was cashed. This is real now. My eyes are wide open." "I didn't realize how expensive moving was! Help!"
What are the customer's actions?	Looking at comparable homes. Researching, mortgage calculators	Pressure to keep to a budget is off. "I see what the neighbors are doing, and I want it better."	"I want everything custom!" "What am I going to do with all of my stuff? This house isn't big enough. Give me more storage!" Curious, busy-bodies, excited, anxious
What or where is the customer researching?	Design books	Still a year before they move in. Looking at neighbors and other models.	During build phase, reaching out to production team "meddling."
How will you move the customer along their journey with you in mind?	Worksheets on website. What to expect before Design meeting.	Host lunch and learn events to teach prospects how to down-size	"Dealership model" on website. Drop down with preselected options. Improve communication to customer during production phase

2025 Strategy



Testimonial

"We couldn't take all this out of our heads and get it into a beautiful process without Nicole. Thank you keeping us on track!"

Katie Lancianese, President



Testimonial



"Nicole is a proven and effective digital marketing strategist. She was able to take our broad vision, create an action plan based on our goals, and drive real results.

Nicole has a sharp eye for what works in today's digital marketing landscape and understands that what works today may not work tomorrow.

Additionally, her consultative approach makes working with her a true joy. It felt collaborative throughout the entire process. We will continue to work with her on future projects!"

Anthony Lancianese, Director of Sales

COULD YOUR BUSINESS FUNCTION WITHOUT YOU?

Pull yourself out of the daily weeds and back into the role of visionary with



WHAT WE DO

Market Research
Brand Marketing
Strategic Advisement



**LET'S CONNECT
& INSPIRE**

Nicole Kurtz
Founder, Aducate Digital
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  @AducateDigital