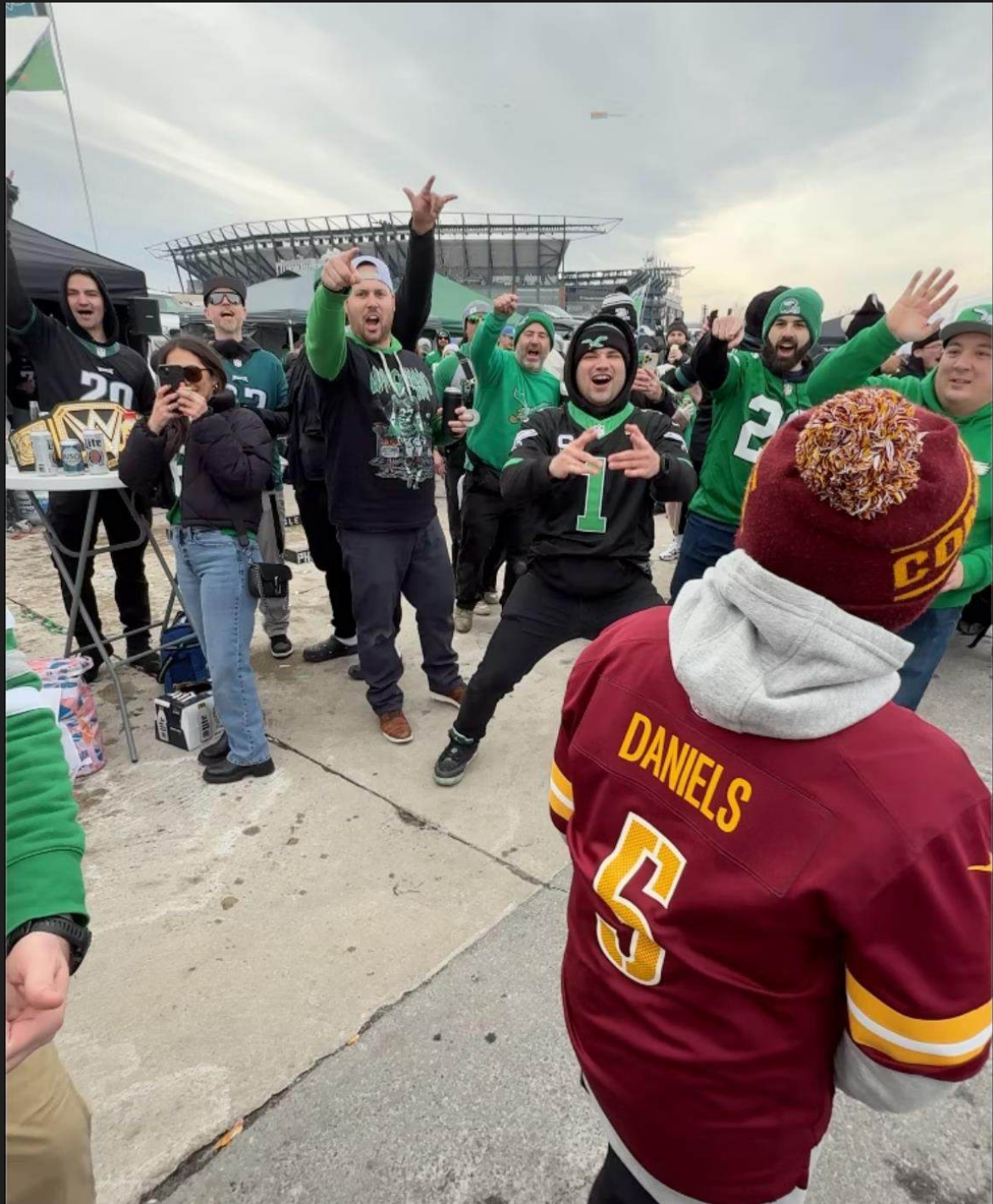


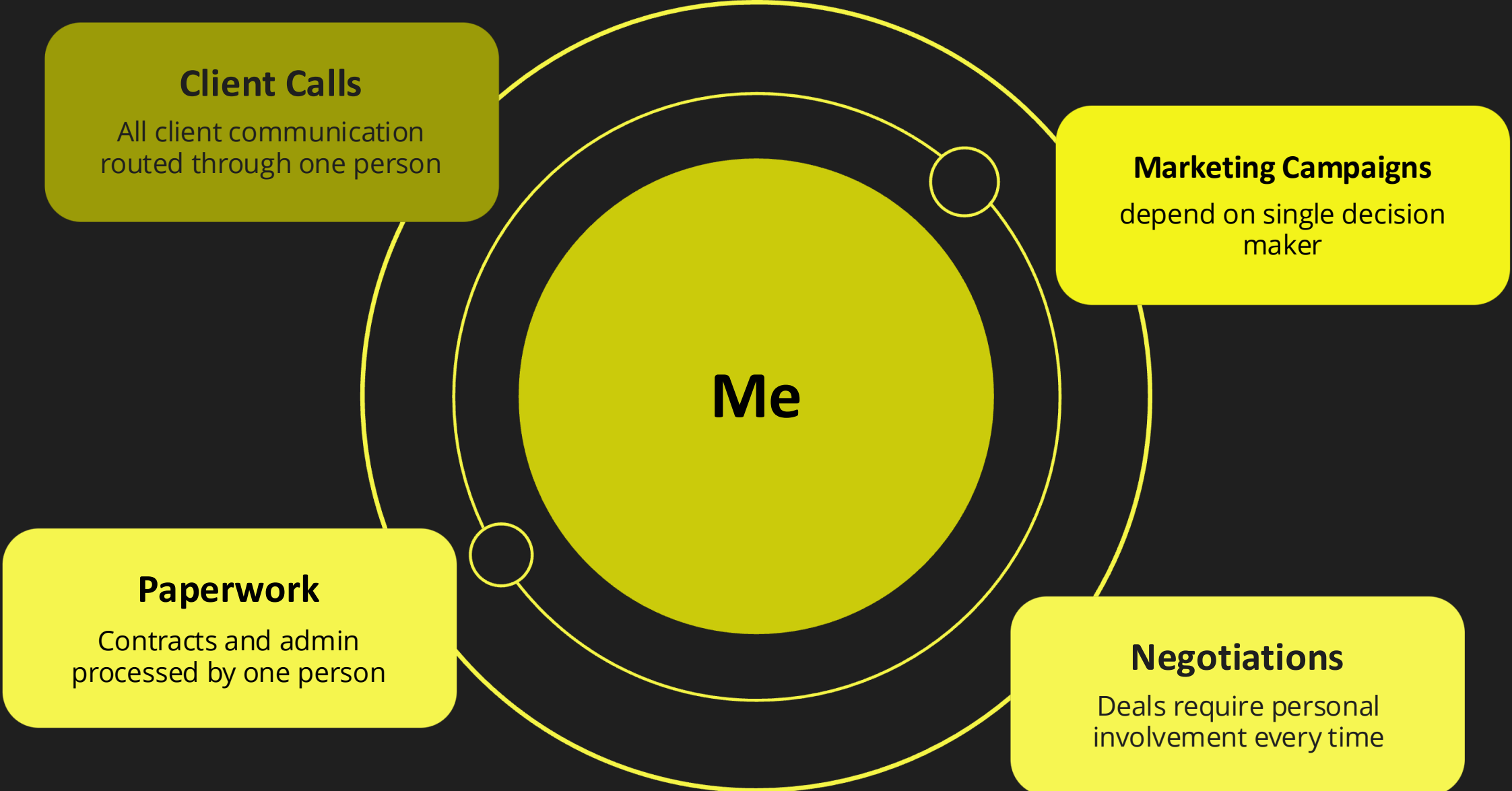


# VELOCITY

SELLING AT SCALE



# The Growth Problem



# Four Gears of Our Business



# Gear 1: Marketing—The Attraction Engine

## The Goal

Move from **Chasing Business** to **Attracting Business**

## The Result

Build a system that consistently pulls people into your funnel while you sleep—no more hunting for every lead manually

## Questions to Consider

- Who are you trying to attract?
- What problem are you trying to solve?
- What channels connect you with your ideal client?
- How regularly are you communicating?
- What action do you want them to take?

# Gears 2 & 3: Sales and Delivery



## Gear 2: Sales—Positioning Your Solution

Move from **Convincing** to **Consulting**. Create a repeatable process to get a "Yes" without being salesy or fake.

- What problem does this person have?
- What's your solution?
- Can you actually help them?
- Does your fee align with your solution?



## Gear 3: Delivery—Doing What You're Paid For

Deliver an **Excellent, Predictable** client experience—not a chaotic one. Your Agreement-to-Close System ensures you're 3 steps ahead every time.

- What are the next 3 steps clients need to know?
- How are you preventing surprises?
- How often do clients receive updates?



# Gear 4: Multiplier—Client Relationship Nurturing

Goal: Turn Clients Into Brand Ambassadors.

Your database becomes like a savings account that pays interest in referrals. When you work this gear right, your past clients become your sales force.

## Key Considerations

### Post-Transaction Value

What unique value can you continue to offer clients after the initial transaction is complete?

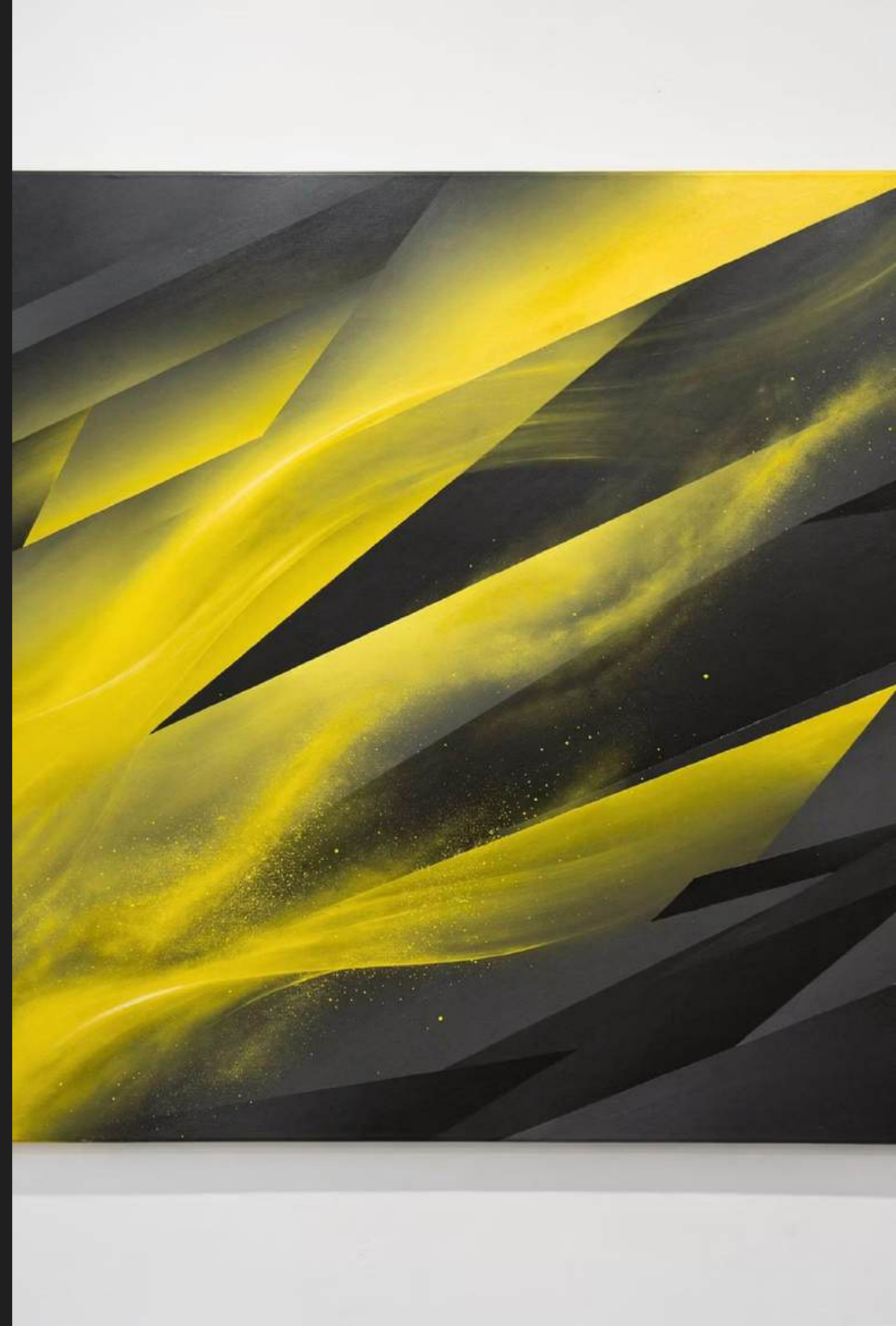
### Communication Frequency

How often will you communicate with past clients and your sphere of influence to maintain engagement?

### Database Prioritization

Develop a clear strategy to filter and prioritize your large database for targeted nurturing efforts.

Generic vs.  
**Impact-Based**  
Lead Generation



# The Marketing Gear

## MARKETING CHANNELS?

- Social media (organic or paid)
- Google PPC or Meta ads
- Direct mail postcards
- Email newsletters
- Social Media

## LEAD PILLARS?

- Open Houses
- Farming
- Sphere/Client Referrals
- Agent Referrals
- What else?

**AWARENESS to ALIGNMENT**

# Then vs. Now

## Google Search (2023)

"Best 15 minute kettlebell workout for beginners"

Generic, keyword-based. The user gets a list of blog posts and YouTube videos that may or may not match their actual situation.

## Gemini Search (2026)

"I've got one 20lb kettlebell, a slight tweak in my lower back, and exactly 14 minutes before my next listing appointment. Build me a high-intensity circuit that avoids heavy deadlifts but will still make me feel like I earned my morning espresso."

Hyper-specific, context-rich. The AI delivers a **personalized solution** that accounts for constraints, preferences, and desired outcomes.

# Then vs. Now

## Google Search (2023)

"Best men's business casual outfits with navy blazer"

Broad, impersonal. Results include generic fashion blogs and retail sites with no understanding of the user's specific context or style preferences.

## Gemini Search (2026)

"I'm wearing a navy blazer and dark jeans to a closing dinner tonight, but I want to look 'cool-rich' not 'corporate-stiff.' What shoes should I wear if it's raining in DC, and can you find me a pocket square pattern that subtly matches the Washington Commanders' colors without being tacky?"

Deeply personal, situational, and value-driven. The AI becomes a stylist who *understands the vibe* the user is trying to project.

# Then vs. Now

## Google Search (2023)

"Best realtor in Fairfax, VA"

Vague and overwhelming. Results include Zillow profiles, Realtor.com listings, and generic brokerage websites. The user has no clear way to differentiate one agent from another.

## Gemini Search (2026)

"I'm looking for a realtor in Fairfax who is an expert in the Woodson High School district. I'm a first-time seller and I'm nervous about the process, so I need someone who is known for being high-touch and communicative (not a big team where I'll just get passed to an assistant). Can you find me someone who has a track record of selling older split-levels and offers professional staging as part of their fee?"

Laser-focused on pain points, service style, and proven expertise. The AI serves up **the specialist**, not the generalist.

**AWARENESS to ALIGNMENT**

**GENERIC to IMPACT-BASED**

# Generic vs. Impact-Based Content

## Example 1: First-Time Buyers

Generic: "3 Tips for First-Time Buyers"

**Impact-Based:** "How to Win in a Bidding War Without Waiving Your Inspection"

**Why it works:** It addresses the fear that first-timers have—that they'll buy a house that's falling apart just to compete.

## Example 2: Sellers Prepping Homes

Generic: "5 Ways to Prep Your Home for Sale"

**Impact-Based:** "The \$2,500 'Profit-Trap': 3 Common Upgrades That Actually Cost You Money at the Closing Table"

**Why it works:** Sellers aren't afraid of "prepping." They're terrified of spending money on a kitchen remodel that doesn't increase their net proceeds.

# Generic vs. Impact-Based Content

## Example 3: Downsizers

Generic: "5 Reasons to Downsize Your Home in 2026"

**Impact-Based:** "The 'Equity-Leak' Audit: Why 40% of Downsizers Spend More on Their Move Than They Save in the First Year (and How to Avoid It)"

**Why it works:** It addresses the fear of a bad trade. Downsizers worry that after 30 years of building equity, they'll waste it on high commissions, expensive movers, or hidden condo fees.

## Example 4: Investors

Generic: "How to Find Investment Properties in Northern Virginia"

**Impact-Based:** "The 'Stress-Test' Strategy: How to Identify Properties That Cash Flow Even if the Federal Reserve Keeps Rates High Through 2027"

**Why it works:** Investors are wary of market stall. You're no longer just a "property finder"—you're a **risk manager** who protects their downside.

# The Referral Pivot: How We Ask for Business

## The Old Way (The Generalist)

"Who do you know looking to buy or sell in the next 6 months?"

This question is too broad. People can't scan their mental Rolodex for that. It requires too much mental work, so they default to "I'll let you know if I hear of anyone."

## The New Way (The Specialist)

"Who do you know that is **terrified of making a mistake** on their first home purchase?"

"Who do you know that is **moving from out of state** and needs someone to be their 'boots on the ground' from start to finish?"

Names pop into their heads *instantly*. You've moved from asking for a lead to offering a solution to a **specific problem**.

**WHO** are your **BEST CLIENTS?**

**WHAT** was Anna's **PROBLEM**?

**WHAT** was Anna's **FEAR**?

**WHAT** was the **SOLUTION**?

**WHAT** does **SUCCESS** look like?

# Understanding Anna

## Anna's Problem

- Doesn't want to be priced out of the market
- Tired of being outbid repeatedly
- Not enough homes that meet her specific criteria
- Not willing to compromise on her standards

## Anna's Fear

- Overpaying for a home
- Not knowing what's coming next in the process
- Making a decision her late father wouldn't have approved of
- Being let down by an unprofessional agent again

## The Solution

- A clear, step-by-step process with no surprises
- Understanding how contract terms prevent overbidding
- Proactive communication (not reactive)
- Concierge-like service—she's busy and doesn't want a part-time job

# Building the **Filter**: The **Easy** Questions

What do they do for work?

How do they spend their time?

What stage of life are they in?

Are there unique things that separate them from your other clients?

# Building the **Filter**: The **Catalyst** Questions

**The "Why Now?"** What prompted their purchase or sale? Was it a pregnancy? A promotion? Retirement? A divorce?

**The Conflict:** What were the pain points in their situation?

**The Dream:** What was the one big thing they thought this move would solve?

# Building the **Filter**: The **Decision** Questions

**The Anxiety:** What was the single biggest thing they were afraid of during the transaction?

**The Alignment:** What was it about working with you that made you the best solution to their pain point?

# 6 Ways to Find Your Ideal Client

# Answer Engine Optimization (AEO)

Build your online presence around the specific pain points your avatar faces.

Instead of "real estate tips," create content like "How to buy in Fairfax without waiving your inspection" or "Selling a split-level in the Woodson district: what staging actually works."

When someone asks a hyper-specific question, you want to be the answer.

# Social Media **Filtering**

Stop posting "Just Listed!" and start posting content that speaks directly to your avatar's fears and goals. \

Example: "3 things first-time buyers in Fairfax are terrified of (and how I help them avoid all three)."

The right people will engage. The wrong people will scroll past.

# The **Precise** Referral Ask

## Instead of asking:

"Who do you know buying or selling?"

This is too broad and generic.

## Ask precisely:

"Who do you know that's terrified of making a mistake on their first home purchase?"

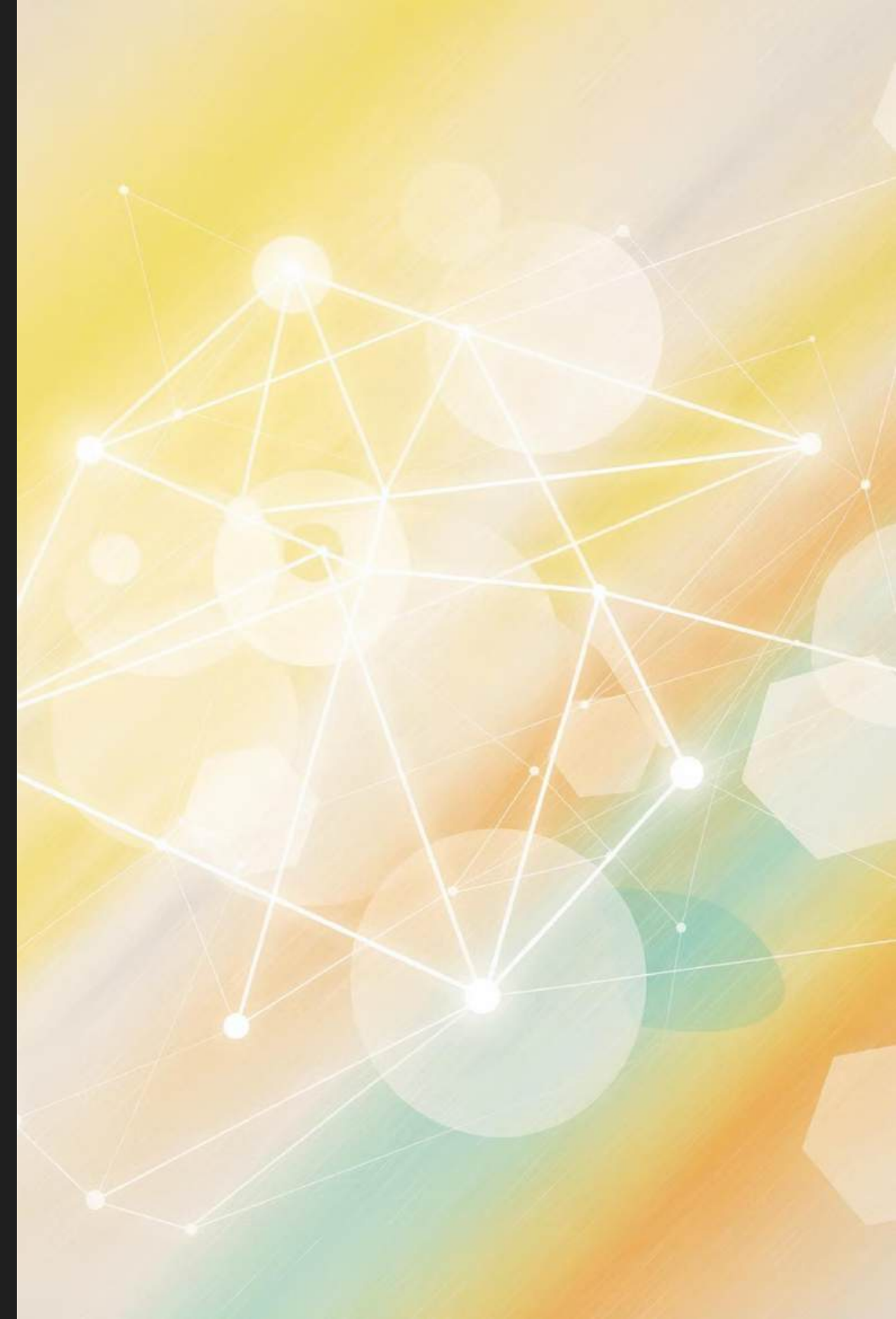
"Who do you know moving from out of state who needs boots-on-the-ground help?"

Names will pop into their heads instantly because you've made it easy to connect a specific person to a specific problem.

# Niche-Network Collaboration

Partner with professionals who serve the same avatar. If your ideal client is a first-time buyer, connect with mortgage brokers who specialize in first-time buyer programs, or financial planners who work with young professionals.

Cross-refer clients who are a perfect fit for each other's expertise.



# Look-Alike Client Case Study

Create a detailed case study of your ideal client transaction. Use it in your marketing, on your website, and in conversations.

"I recently helped Anna, a first-time buyer who was terrified of overpaying. Here's how we structured her offer to win without waiving her inspection..."

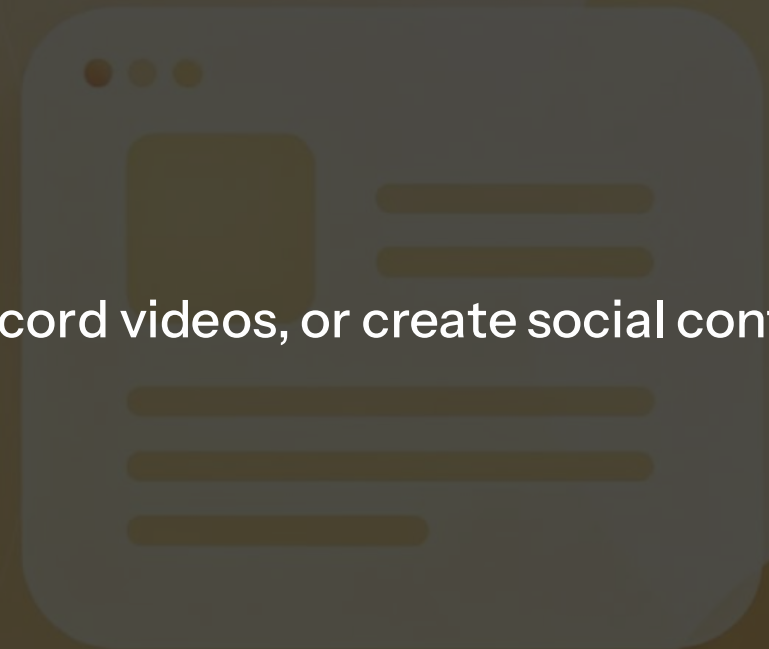
When prospects see themselves in that story, they'll reach out.



# Content as Conversion Filter

Every piece of content you create should act as a filter. Write blog posts, record videos, or create social content that speaks directly to your avatar's pain points.

Ask "Would Anna engage with this?"



**Lead Generation**

**Mastermind**

# Discussion Questions

1.

Looking back at your **last five closings**, how many of those clients actually fit the description of someone you'd want to work with again? **What was the 'DNA'** of the one that felt the most aligned with your strengths?

2.

If I scrolled through your last 10 social media posts without knowing you, would I see a **'Local Real Estate Expert'** or would I see a **specialist** who solves a very specific, painful problem? **What is that specific problem?"**

3.

For your **favorite client** last year, what was the real **catalyst** that made them move? Was it a superficial reason (like 'needing more space'), or was there a deeper **emotional driver** (like 'anxiety over a commute' or 'a desire for a fresh start after a loss')?"

# Discussion Questions

4.

Pick one **generic** piece of content you currently use—like a 'Monthly Market Update' or a 'Just Sold' post. How could we **rewrite** that headline right now to address a **specific fear** or a **problem** for your **ideal avatar**?

5.

When you **ask for referrals**, do you use the 'Old Way' ('Who do you know looking to buy or sell?')? If you switched to asking for a **specific problem** to solve (e.g., 'Who do you know that's terrified of overpaying for a fixer-upper?'), who is the **first person** that comes to your mind in your own database?

6.

As **AI becomes the primary way** clients search for agents, being 'number one in the zip code' is becoming less important than being the 'most **relevant answer** to a complex question.' What is the **one complex question** you want to be the **undisputed answer** for?

The **Best Year** Blueprint:

Turning **Plans** Into **Production**

# The **Problem**: It's not about **desire**...it's about **direction**

The times I've been most **stuck** in my business, it wasn't because I lacked desire.

It was because I just **wasn't sure what to do**.

# Drawing the **Map**

You can't always control the **outcome**...but you can control the **activities**

# Predicting the **Fallout**

The **Goal: 36** Closings

Only **70%** of signed agreements close

**50** Signed Agreements Needed

**50%** conversion rate on appointments

**100** Presentations/Appointments Required

**10** Appointments Per Month (rounded up from 8)

# #1 Success Metric

10

Appointments Per Month

2-3 appointments every single week

It didn't matter if they were ready today or next year.

Presenting was **the win**.

# The **Critical** Questions

1. What was I going to **say** to them in the appointment?
2. What was the **call to action** when the appointment was over?
3. **WHO** am I going to set appointments with? Where are these people and appointments coming from?

# 1. Contact 25 People

Direct, personal, and consistent contact weekly

## The Rules

Rule #1: Has to be 1-1; no mass contact

Rule #2: Has to involve some discussion of **real estate** or the market

## Conversation Starters

- "I have a client interested in your neighborhood, would you share the top 3 things you love about living here?"
- "Did you see the house that just sold?"
- "How is the new house treating you?"

## 2. **Send 5 Referrals**

Think like a **giver**, not just a **receiver**

### **Agent Referral** Network

Look for connections you can make between clients and agents in other markets. My agent referral network has exploded because of this practice.

### **Vendor Referral** Network

Connect clients with trusted vendors—contractors, lenders, inspectors, movers. Build goodwill and strengthen your network.

### 3. Send 5 Market Updates or Home Valuations

Send 5 personalized home value updates or local market snapshots to past clients or leads each week.

## 4. Send **3 Pieces** of Content

Social Media, Email, Direct Mail, Etc.

### Go Where Your Database Is

What marketing channels are **your database** on? Meet them there!

### Content Ideas

- Email: Deal of the Week
- Email: Open Houses to See This Weekend
- Email/Social: What's in the News + **Personal Story**

## 5. Meet 1-1 with 1 Person/Group

Face-to-face connection builds trust

- Host someone for dinner
- Schedule coffee or lunch
- Attend a networking event



# The 12-Week Sprint

01

---

## Commit to the Circuit

Commit to this circuit for **12 weeks** with a group of peers. Don't go it alone.

03

---

## Don't Look Up

Don't analyze, don't judge the results until **week 13**. Just execute.

02

---

## Log Your Activity

**Log** everything: How many calls? How many referrals sent? How many updates? How many appointments set? How many leads/referrals received?

04

---

## Re-evaluate at Week 13

At the end of **90 days**, THEN re-evaluate what's working and what's not. Set the activity goal for the next 12 weeks.

# Tactical **Five**: Your **Weekly** Circuit

Five Weekly Business Builders to Get 10 Appointments

01

Contact **25** People

02

Send **5** Referrals

03

Send **5** Market  
Updates or Home  
Valuations

04

Send **3** Pieces of Content

05

Meet 1-1 with **1** Person/Group

# Let's **Connect**

Aaron **Nichols**

**Washington, DC/Northern VA**

**(703) 915-9852**

**aaron@nichols.realestate**



# Meet the **PANELISTS**



**TIM GARRITY**

REAL BROKER

TIM GARRITY TEAM



**ALISON SIMON**

KELLER WILLIAMS



**SHAWN MARTIN**

REAL BROKER

SHAWN MARTIN GROUP



**RAFFAELLINA  
MERLINO**

KELLER WILLIAMS

RARITY REAL ESTATE TEAM

# 3-2-1 Mastermind

3

What are **3** things that are **working** in your business right now?

2

What are **2 pain points/frustrations** in your business?

1

What is **1** thing that **needs to change** right now? What are you going to do about it?

# THE VELOCITY ROADMAP

**PLAN, IMPLEMENT, AUGMENT: THE  
ARCHITECTURE OF SCALE**

**PRESENTED BY:  
RONA JOBE, FOUNDER/CEO**

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Rona Jobe

# About Me



- Founded LVL-Up Strategies in 2020
- Award-winning CEO and entrepreneur



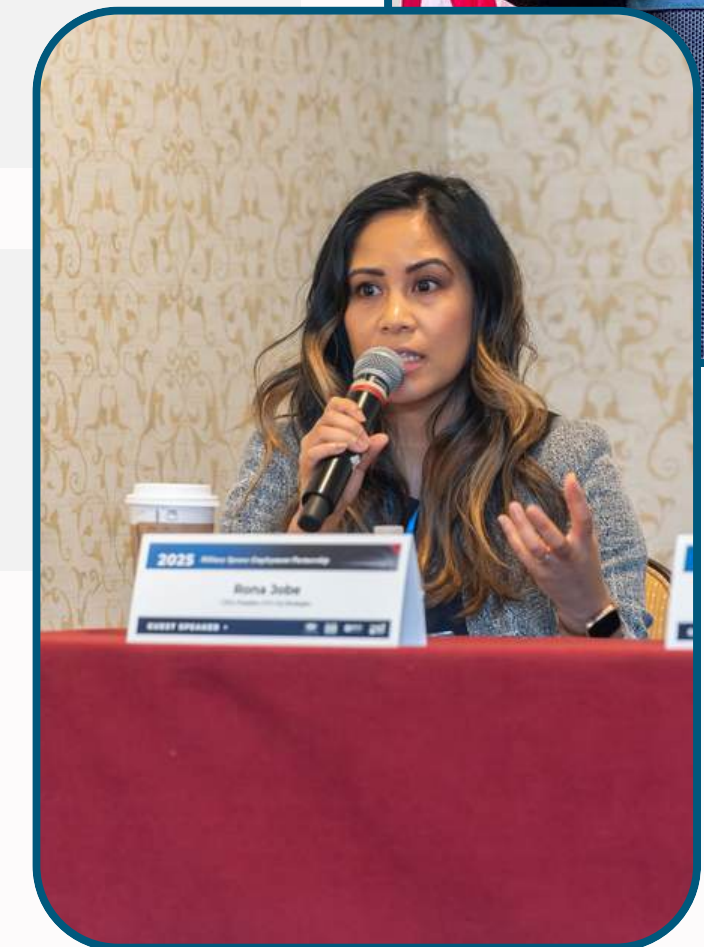
- Mentored + consulted over 100 business owners
- Consulted and strategized for over 50 companies
- Speaker + podcast host



- 18+ years in enterprise/corp/gov consulting
- 10+ years in small business
- UC Berkeley + George Mason University Alum



- Lived in multiple countries (U.S., Brazil, the Philippines, Germany)
- Girls on The Run NoVa Board Member
- National Association of Women Business Owners DC Board Member
- 3 kids, 1 dog





# About LVL-Up Strategies



# All the Information!

Today you received:

- Avatars → Fill the pipeline
- Scripts → Convert
- Delivery → From the panel
- VIP Referral System → Multiply

Don't implement 50 things.  
Implement ONE.

# Speed vs. Velocity

Speed = Movement

Velocity = Movement + Direction

*High speed in a circle is still stuck.*

**Build direction. Not drama.**

# Stop being the HERO

Saves the day  
Puts out fires  
Indispensable employee

# Be the ARCHITECT

Designs the machine  
Approves the build  
Delegate & scale

# Departments & Functions



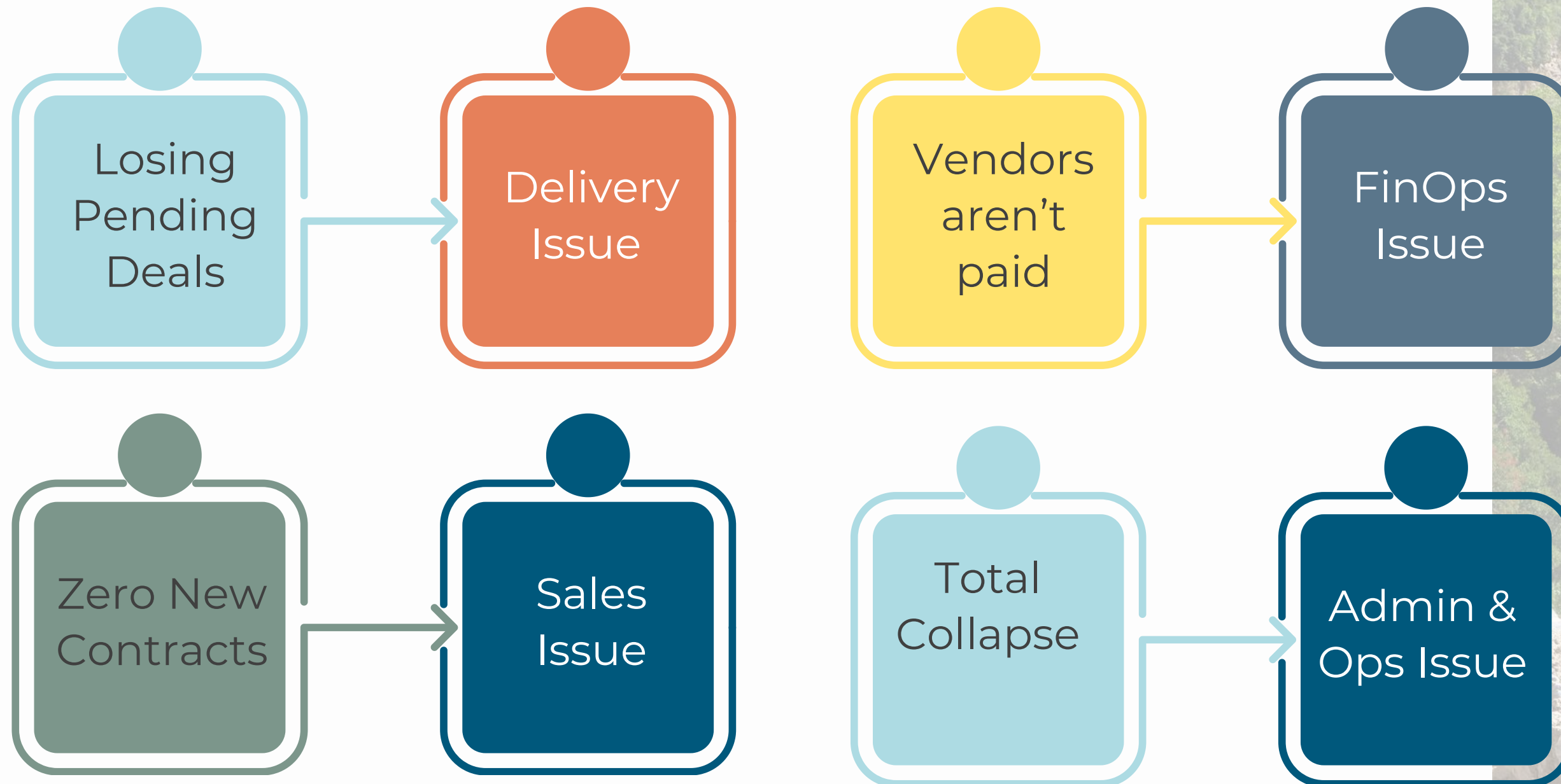
**Technician:** Performs the department's actual hands-on tasks.

**Manager:** Creates the systems, measures progress, and organizes the workflow.

**Executive:** Sets the vision for how the department fits into the company's future and explores innovative improvements or expansions.

# Bottleneck Audit

If You Leave for 30 Days... **What fails first?**



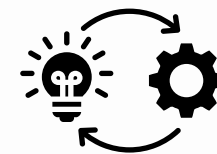
# The Solution?

**Strategize & Plan**



- Visualize the full flow
- Choose your systems
- Create the timeline

**Implement**



- Tech implementation
- Checklists, SOPs
- Policies, Guides

**Augment**



- Delegate
- AI/Automation



# Your Process Priority List

An inventory of your needed processes

## Department Focus

Choose a department based on what is most pressing.

## List Most Common Tasks

What are you doing on a day-to-day, week-to-week, month-to-month basis?

## Identify Intended Results & Role

What are the most common tasks?



One-Year Milestones

Next Quarter's Focus

Process 1

Process 2

Process 3

Process 4

Process 5

Checklist  
45 mins

Checklist  
45 mins

Checklist  
45 mins

Checklist  
45 mins

Checklist  
45 mins

SOP  
2-4 hours

SOP  
2-4 hours

SOP  
2-4 hours

SOP  
2-4 hours

SOP  
2-4 hours

Policy  
1-2 hours

Policy  
1-2 hours

Policy  
1-2 hours

Policy  
1-2 hours

Policy  
1-2 hours

Guide  
1-2 hours

Guide  
1-2 hours

Guide  
1-2 hours

Guide  
1-2 hours

Guide  
1-2 hours

Testing  
1-2 hours

Testing  
1-2 hours

Testing  
1-2 hours

Testing  
1-2 hours

Testing  
1-2 hours

Mapping/Automation  
2-4 hours

Mapping/Automation  
2-4 hours

Mapping/Automation  
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Mapping/Automation  
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Mapping/Automation  
2-4 hours

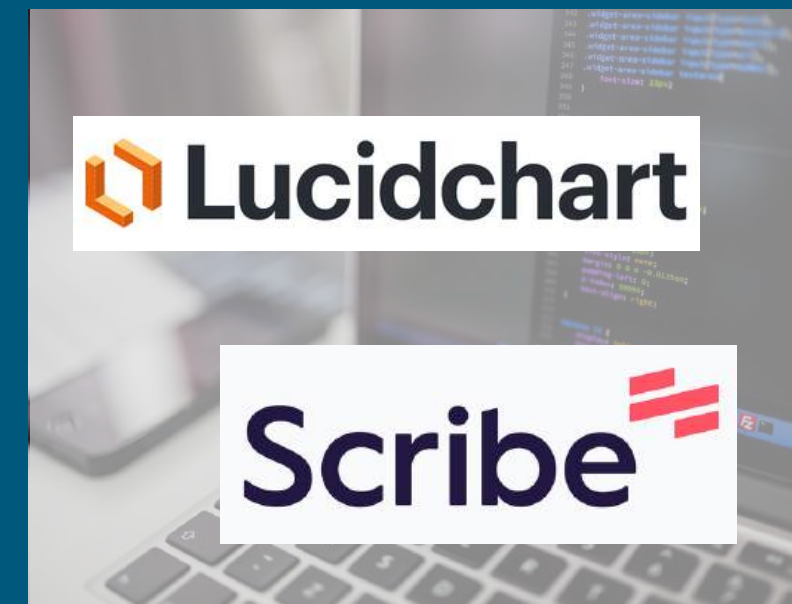
# Process Documentation Tools



**REPOSITORY &  
PM TOOLS**



**FEEDBACK &  
REVIEW TOOL**



**PROCESS MAPPING  
TOOLS**

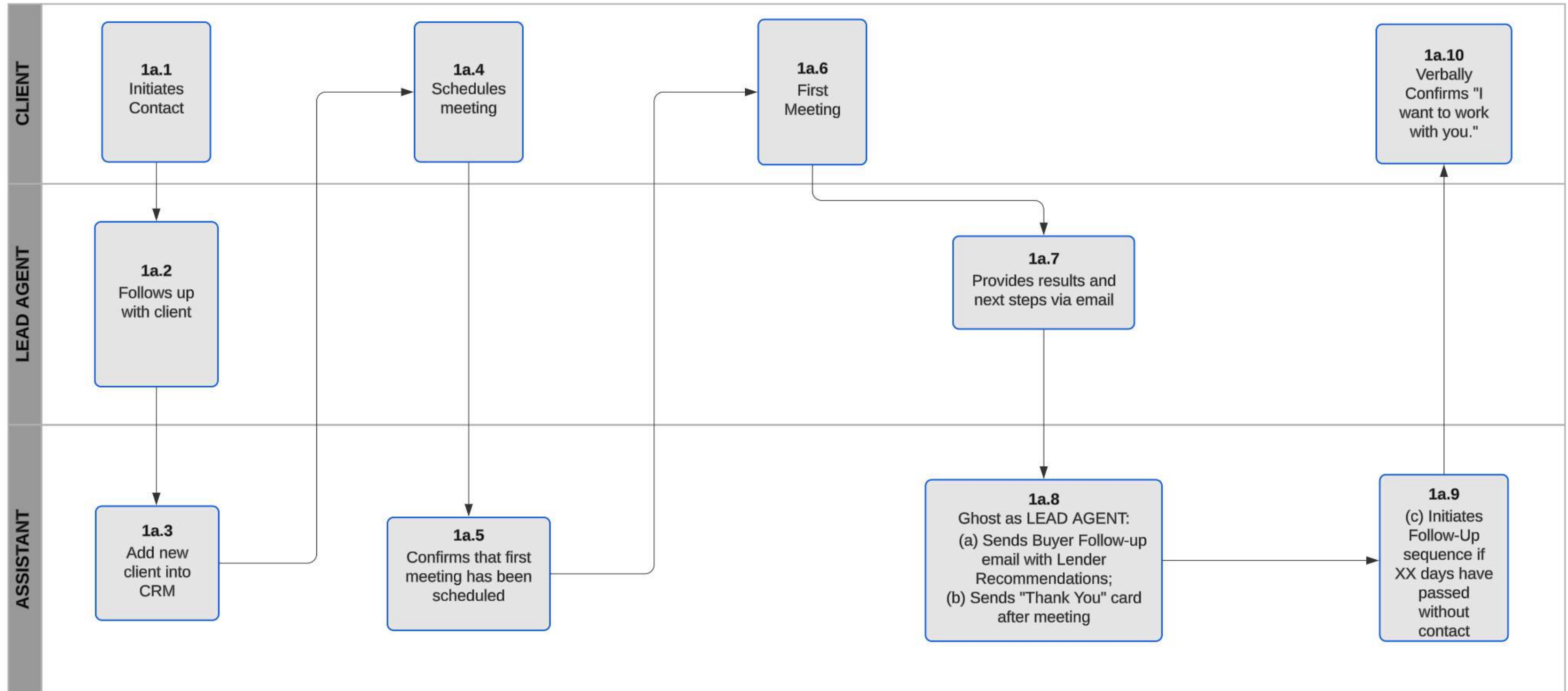


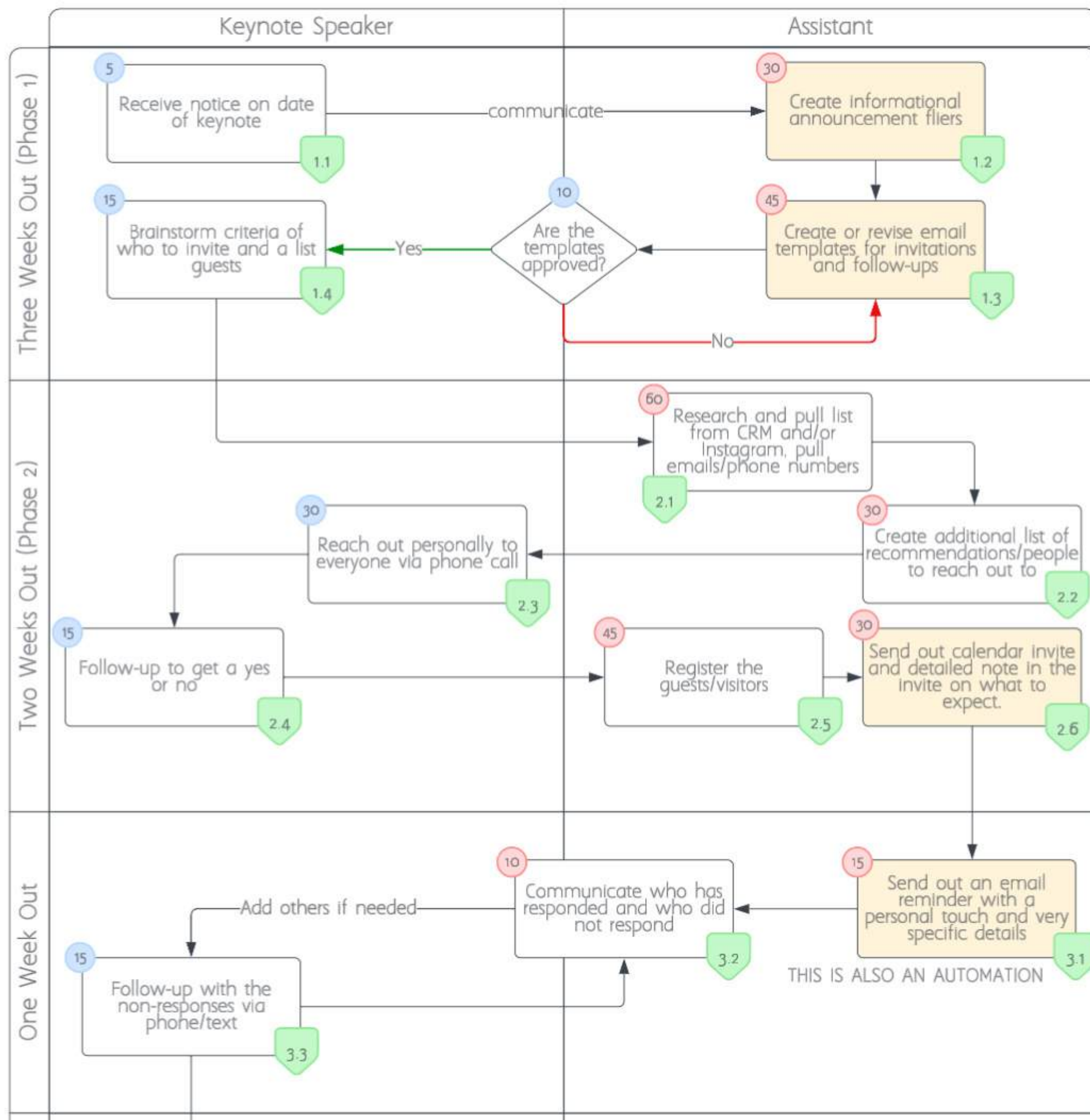
**OTHER TOOLS / AI**



# The Buying Process

## Phase 1a- Realtor Procurement





## Standards and Procedures #HR-002 How to Submit Timesheets

This SOP outlines How to Submit Timesheets in Hive. Timesheets are submitted weekly, by Monday COB. At the end of the month, estimated billable hours need to be submitted to Operations.

Typically the following staff/stakeholders are involved in this project:

- LVL-Up Implementers
- LVL-Up Operations

Below are links to LVL-Ups Internal Guidelines/SOPs/Examples for this type of project:

### Submit Timesheets in Hive

When you record your time in the cards in Hive, it tracks your time and adds it to your timesheet. To submit your time:

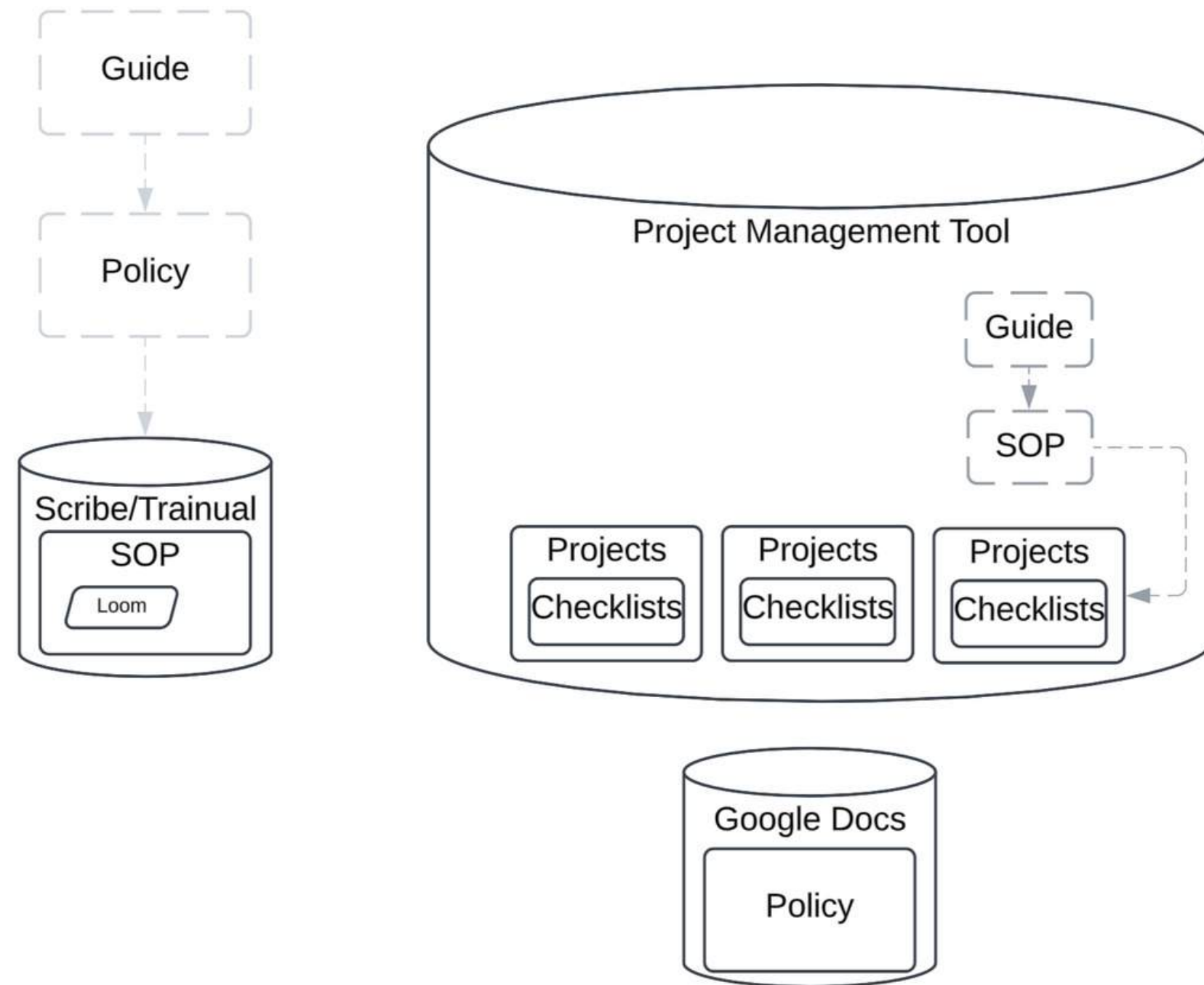
- Left hand side of Hive click on Time
- At top click on Timesheet
- At top right make sure the dates are the week you are looking at
- Scroll to the bottom
- Bottom right you will see a number/number. This shows you the difference between hours recorded and hours pulled into the timesheet; they must match
- When hours match, click Submit on the bottom right. This locks and sends your timesheet to Operations for approval

### How to change time after timesheet is submitted and not yet approved

- Reach out to Operations and ask for your timesheet to be returned to you
- The Ops Team will mark your timesheet with the Request Changes
- Then you can make the changes in the necessary card
- Make sure the numerator and denominator match
- Click submit

### How to change time after timesheet is submitted and approved

- Go into your timesheet and find the Project you need to adjust. On the right-hand side, there is a trash can; click on that
- Go back into the card and adjust the time
- Go to timesheet and check your changes were recorded



Various tools (project management, documentation repositories, videos, and diagrams) work together to store, share, and implement your process documentation in a single, coherent system.

# How do they all work together?

All these process documentation elements (guides, policies, SOPs, and checklists) can live in whatever software combination best suits your workflow.

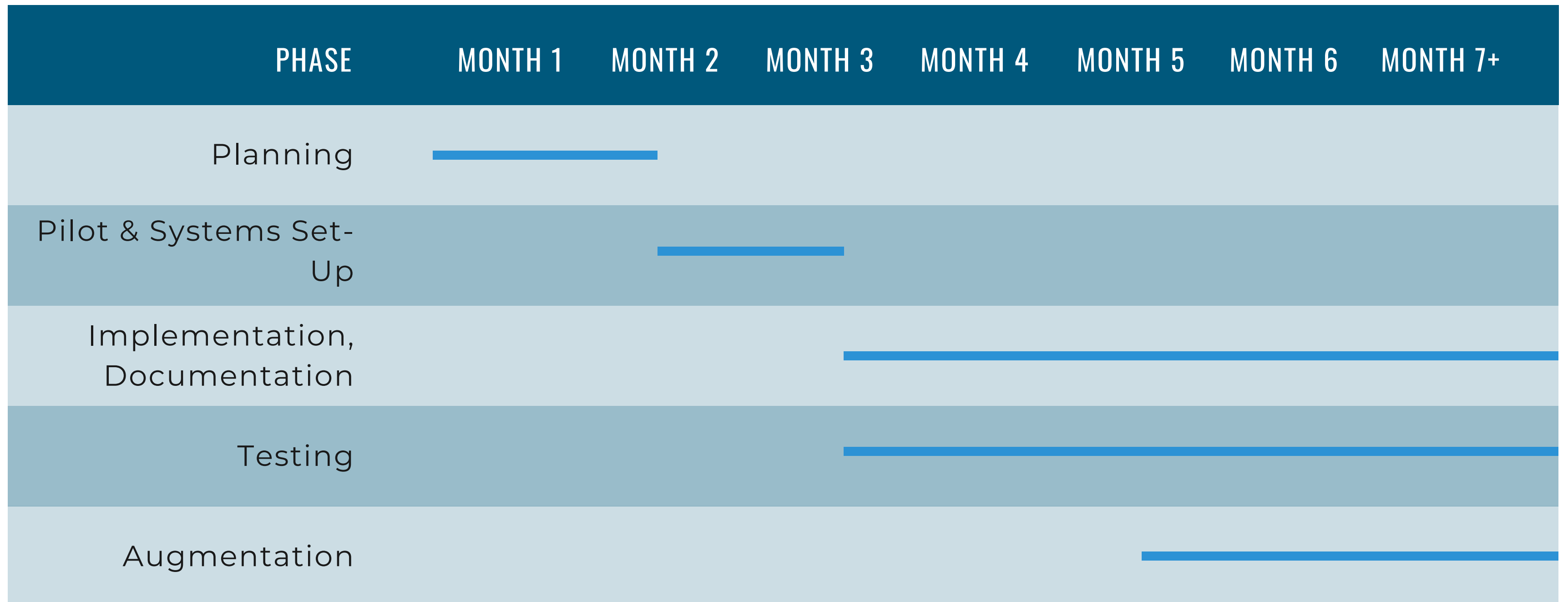
Some people keep everything (including task management and SOP references) inside a single project management tool, while others split them across separate platforms for SOPs, visual diagrams, or video instructions.

Ultimately, it's about mixing and matching the right tools to create a seamless flow from policy to procedure to daily checklist.

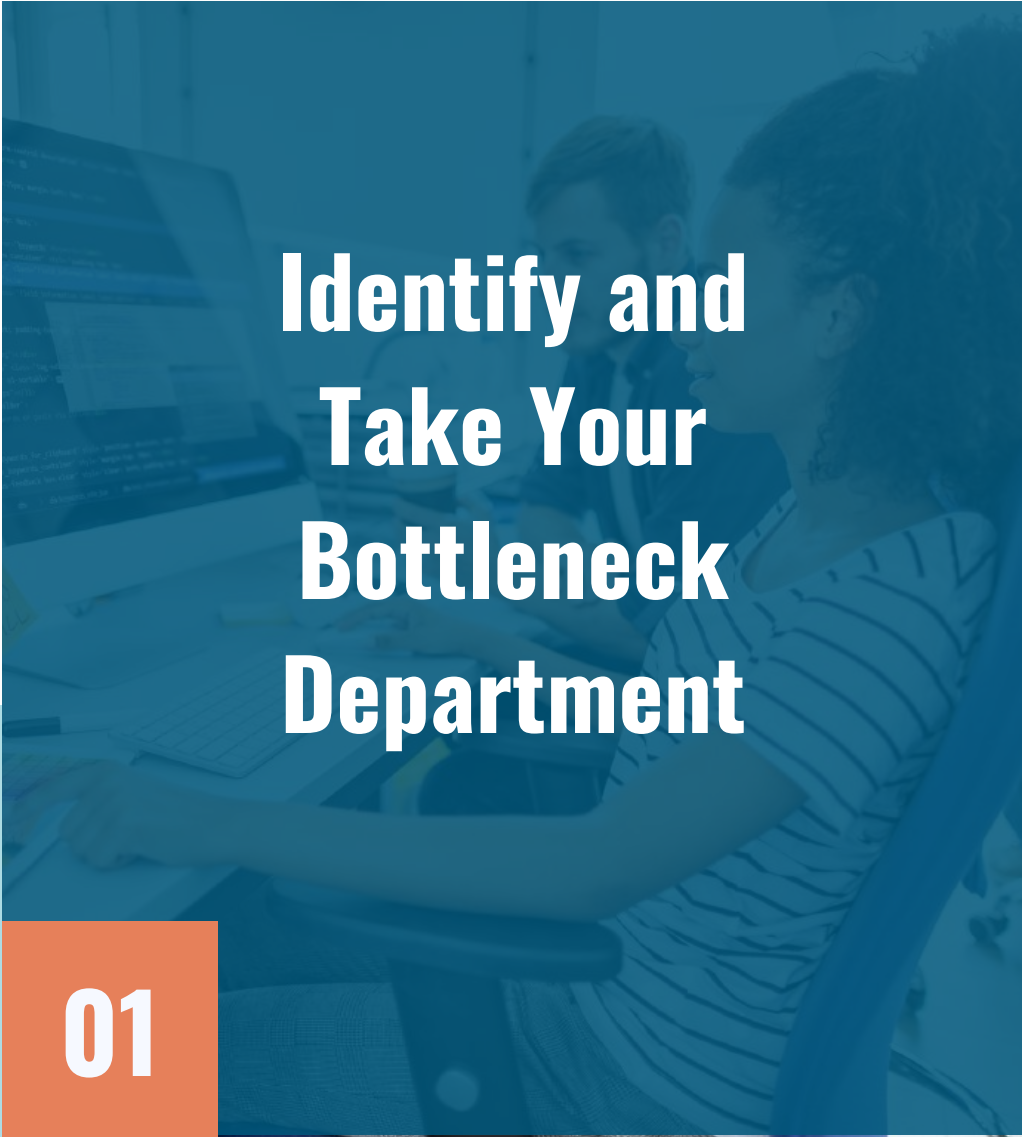
# Reality Check

Planning, Implementing, and Augmenting take time.

**Give it the attention and direction it deserves.**



# The Challenge for Tomorrow: Option 1



**Identify and  
Take Your  
Bottleneck  
Department**

**01**



**List Out All of  
the Tasks and  
Processes**

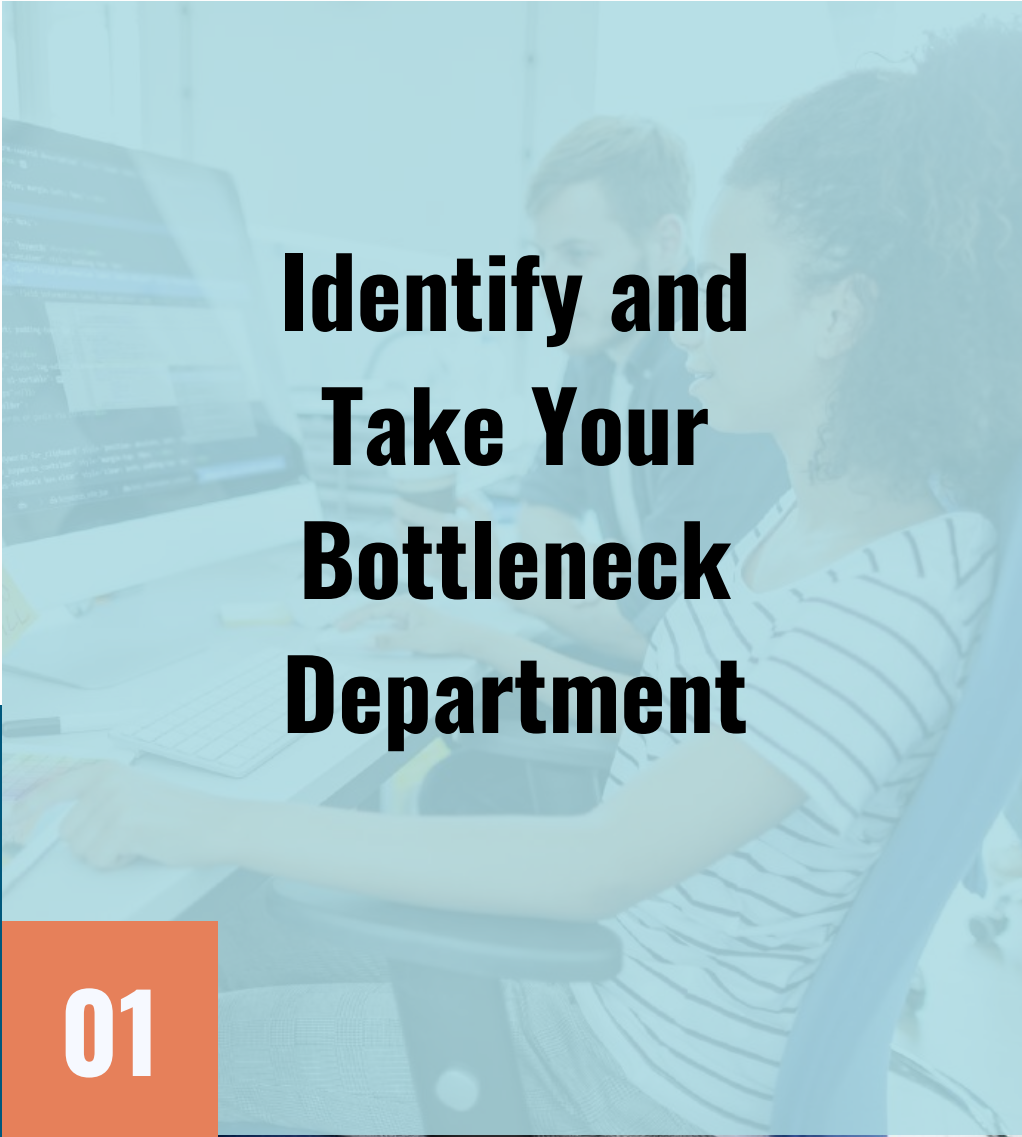
**02**



**Time-Block Two  
Hours and  
Create Your  
First  
Documented  
Process**

**03**

# The Challenge for Tomorrow: Option 2



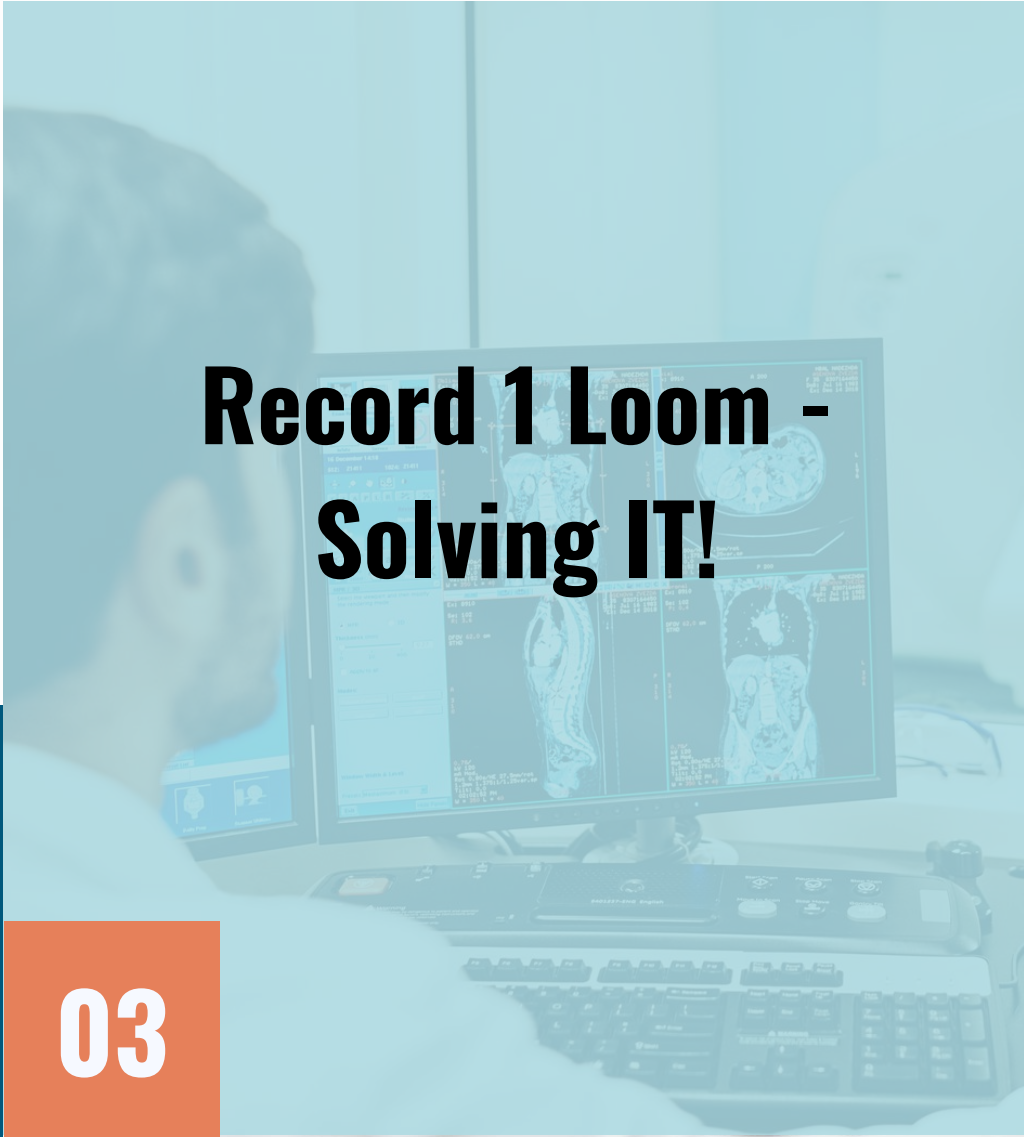
**Identify and  
Take Your  
Bottleneck  
Department**

**01**



**Find the Urgent  
and Repetitive  
Fire**

**02**



**Record 1 Loom -  
Solving IT!**

**03**

---

Building a practice is life-changing work.

It's freeing.

# Thank You

## Rona's Contact:

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 outreach@lvlupstrategies.com

