



Latreia Coaching

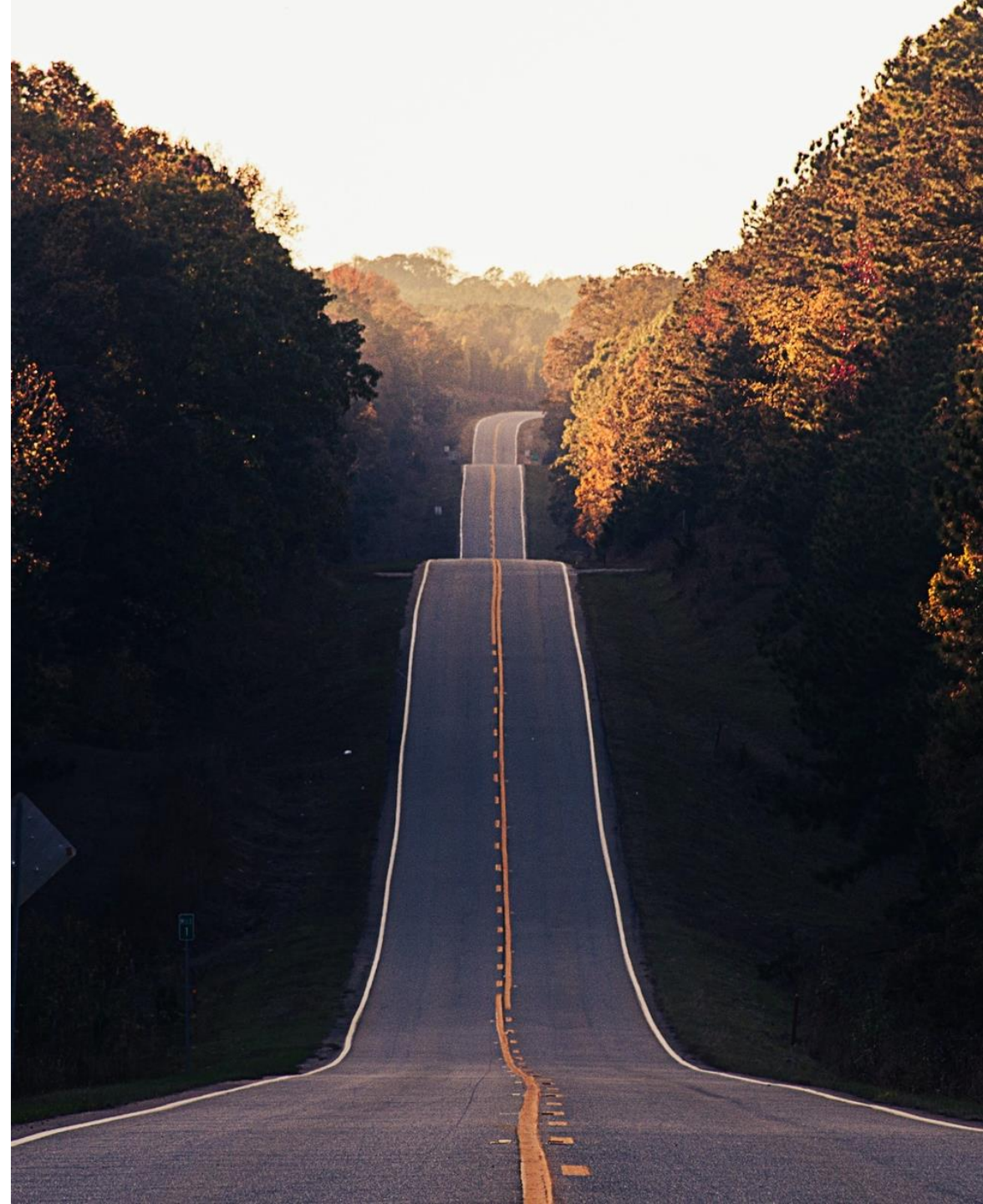
Challenging your status quo

Latreia Coaching & Consulting LLC

www.latreia coaching.com

Info@latreia coaching.com

614.638.9397 / 404.784.3771



Our Mission



To engage, equip and inspire our clients to thrive by challenging their status quo.

The desired result is living out their personal and professional lives with purpose & fulfillment.

Serving our members is our sacred duty.

Values driven Coaching & Consulting

Core Values

accountability growth mindset
commitment innovation
courage relationship
excellence relevance

Principles

we build trust
we clearly communicate
we cultivate transformation
we make values-based decisions

Vision

to create environments where professionals can
discover the secrets to extraordinary success

Value Proposition

a team decades in the making, we offer experience,
wisdom and passion to professionals ready to build a
thriving mindset



The Team



J.A. Dava, Co-founder, Sr. Coach
30+ year veteran in real estate & mortgage
Professional presenter, trainer & coach
Rain-maker entrepreneur for 20+ years
Influencer, leader & master networker
Husband of 28 years & proud dad of 2 sons
Avid marathoner, golfer & Harley-Davidson cruiser



Paul Waldrop, Co-founder, Sr. Coach
30+ year veteran in mortgage industry
Sales & leadership coach for 20+ years
Executive leader in mortgage industry
Entrepreneur & business owner for 10+ years
Husband of 30 years & proud dad of 2 daughters
Coffee aficionado & backwoods enthusiast

How is Latreia Coaching Different?

We challenge your status quo



Thought Provoking Engagements

Challenging the current mindset to passionately pursue performance excellence



Consistent Execution

Defining and measuring the right activities to ensure the right target outcomes



Collaborative Community

Leveraging the power of the many to pull the one to the next level of breakout achievement



Highly Relational

Creating environments for connection ensuring a kindred community committed to mutual success



Prescriptive Roadmap

Following a progressive pathway to maintain momentum and create the expectation of success



Integrated Focus

Bringing all components of one's life into the discussion to ensure balance and fulfillment



What is the Latreia Coaching Experience?

- **Transformational Coaching**
 - Instruction** - focused learning on topics directly related to key activities
 - Collaboration** - guided interaction to deepen understanding and application
 - Expectation** - transparent accountability to support consistent execution
- **Skills Based Reinforcement**
 - Weekly** - short messages to inspire, encourage, enlighten & challenge
 - Bi-weekly** - podcasts on relevant topics, tactics, questions & insights
 - Monthly** - virtual live sessions, discussions, interviews & presentations
- **Integrated Community**
 - Group Coaching** - crews of 3-4 members with similar production levels
 - Community Forum** - community support, mutual encouragement
 - Latreia Live!** - quarterly and annual gatherings to sharpen skillsets
- **LatreiaCare Support**
 - Coaching on Demand** - coaching in the moment for the moment
 - Strategy Reviews** - when it takes more than a call to prepare for opportunity
 - Exploratory Sessions** - spending the time to get back on the right track
- **Business Metrics**
 - Define Primary/Stretch Goals** - prescriptive growth in the short & long term
 - KPM Tracking** - measuring the right activities leads to the right outcomes
 - ROI Validation** - there are no shortcuts to success, we validate results

Latreia ICE System



Instruction

- Crews of 3-4 members | (1:1)
- 15-minute guided sessions
- Topics are based on skill-level
- Instruction led by coaches



Collaboration

- 5-minute key-point takeaway discussion
- 20-minute general business roundtable
- 15-minute expectation review
- 5-minute commitments & goals capture



Expectation

- Explore wins & challenges
- Review metric performance against goal
- Strategize on execution
- Establish short-term commitments & goals

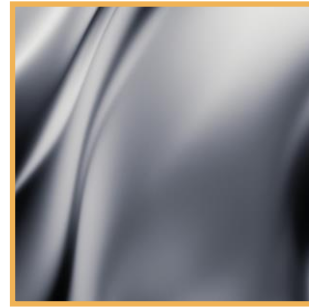
Latreia Coaching uses an online performance portal to host sessions, take notes, track performance and log commitments & goals. Members can access the portal 24/7 from any device.

Four Latreia Levels



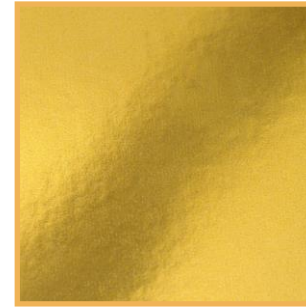
Bronze

- New to Industry (< 12 months)
- Averages < 1 closed unit per Mo.
- Crew of 3-4 members (1:1 available)
- Schedule call to discuss KPMs & ROI
- Target ROI: 2 closed units per month over 90-day rolling average
- 6-month commitment required
- \$399 / month (crew) | \$449 (1:1)
- Bi-weekly ICE sessions



Silver

- Semi-Seasoned (1-3 years)
- Averages 1-4 closed units per Mo.
- Crew of 3-4 members (1:1 available)
- Schedule call to discuss KPMs & ROI
- Target ROI: 50% increase in closed units / mo. over 90-day rolling avg
- 6-month commitment required
- \$449 / month (crew) | \$499 (1:1)
- Bi-weekly ICE sessions



Gold

- Seasoned (4+ years)
- Averages 5-8 closed units per Mo.
- Crew of 3-4 members (1:1 available)
- Schedule call to discuss KPMs & ROI
- Target ROI: 40% increase in closed units / mo. over 90-day rolling avg
- 6-month commitment required
- \$499 / month (crew) / \$549 (1:1)
- Bi-weekly ICE sessions

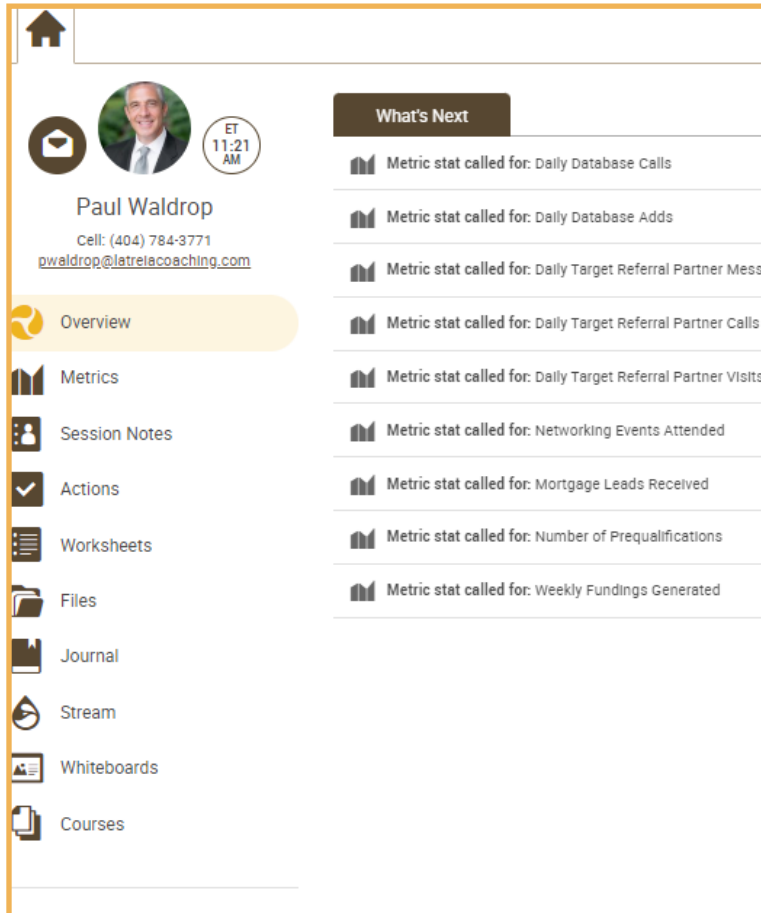


Platinum

- Seasoned Pro (4+ years)
- Averages 9+ closed units per Mo.
- Crew of 3-4 members (1:1 available)
- Schedule call to discuss KPMs & ROI
- Target ROI: customized to client
- 6-month commitment required
- \$549 / month (crew) / \$599 (1:1)
- Bi-weekly ICE sessions

Key activities are based on skill-level and measured against defined goals. Coaches review reports weekly and provide individualized feedback. Prospecting activities focus on referral sources, database contact and networking events while key performance metrics include leads, pre-qualifications, applications and closed loan tracking.

Integrated Technology

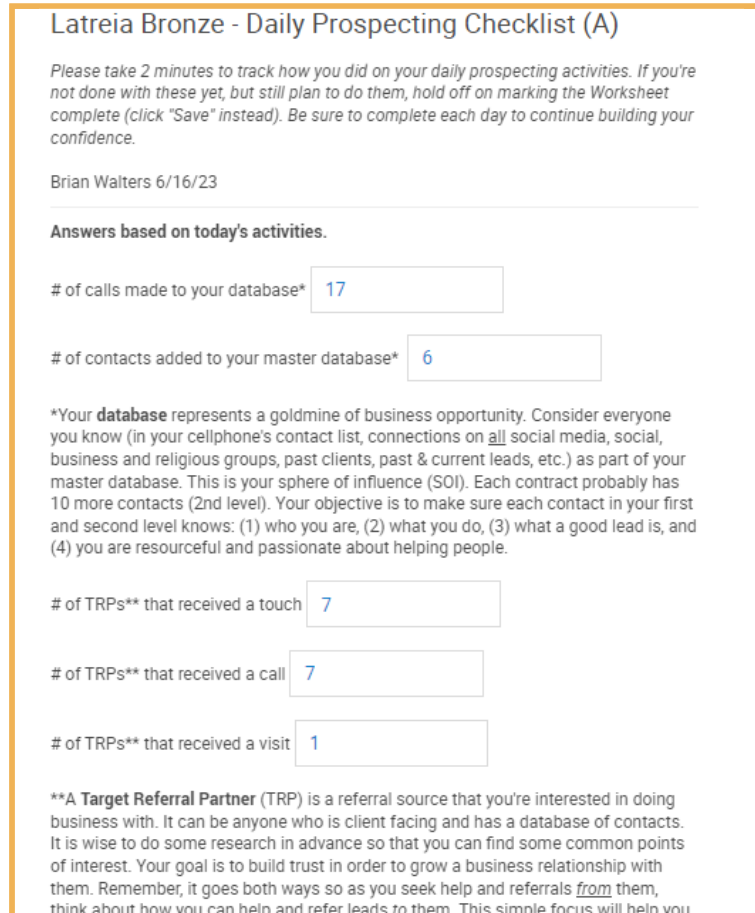


The Client Dashboard for Paul Waldrop features a navigation sidebar on the left with icons for Home, Overview, Metrics, Session Notes, Actions, Worksheets, Files, Journal, Stream, Whiteboards, and Courses. The main content area includes a profile header with a home icon, a profile picture, and contact information: Paul Waldrop, Cell: (404) 784-3771, and email pwaldrop@latreiaicoaching.com. Below the profile is a 'What's Next' section with a list of metrics, each accompanied by a bar chart icon and a brief description of the metric.

What's Next

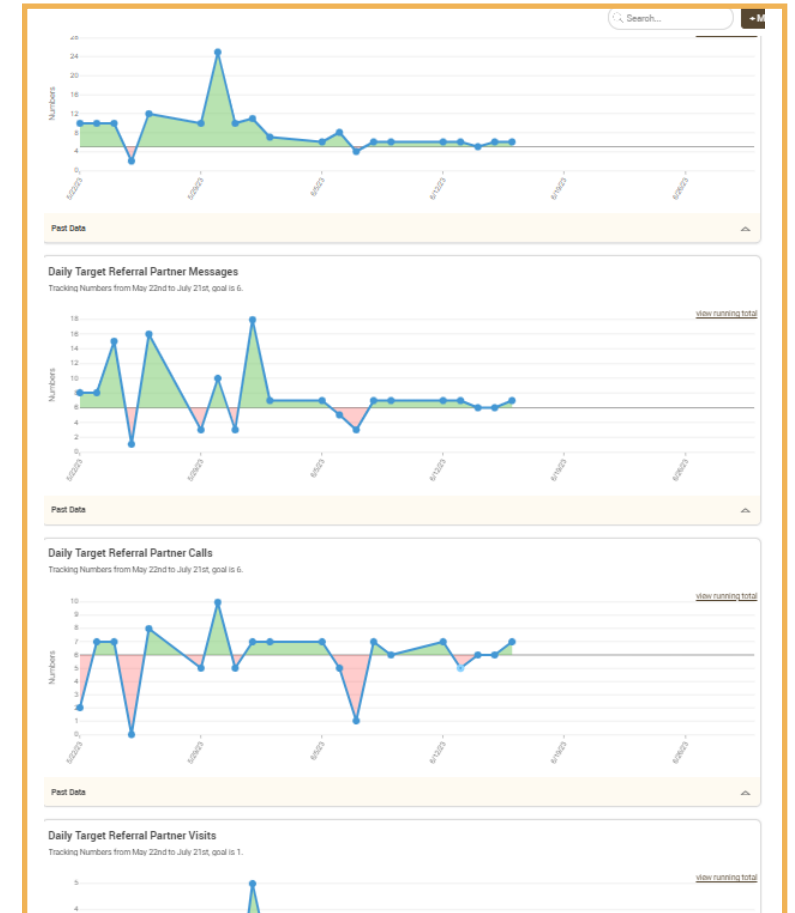
- Metric stat called for: Daily Database Calls
- Metric stat called for: Daily Database Adds
- Metric stat called for: Daily Target Referral Partner Messages
- Metric stat called for: Daily Target Referral Partner Calls
- Metric stat called for: Daily Target Referral Partner Visits
- Metric stat called for: Networking Events Attended
- Metric stat called for: Mortgage Leads Received
- Metric stat called for: Number of Prequalifications
- Metric stat called for: Weekly Fundings Generated

Client Dashboard



The Client Worksheet for Latreia Bronze is titled 'Latreia Bronze - Daily Prospecting Checklist (A)'. It includes an introductory paragraph: 'Please take 2 minutes to track how you did on your daily prospecting activities. If you're not done with these yet, but still plan to do them, hold off on marking the Worksheet complete (click "Save" instead). Be sure to complete each day to continue building your confidence.' Below this is the name 'Brian Walters 6/16/23' and a section for 'Answers based on today's activities.' This section contains four input fields with the following values: '# of calls made to your database*' (17), '# of contacts added to your master database*' (6), '# of TRPs** that received a touch' (7), and '# of TRPs** that received a call' (7). The bottom section contains a definition for a Target Referral Partner (TRP): '**A Target Referral Partner (TRP) is a referral source that you're interested in doing business with. It can be anyone who is client facing and has a database of contacts. It is wise to do some research in advance so that you can find some common points of interest. Your goal is to build trust in order to grow a business relationship with them. Remember, it goes both ways so as you seek help and referrals from them, think about how you can help and refer leads to them. This simple focus will help you

Client Worksheets



Client Metrics

Evergreen Topics

Carpe Diem	Master Your Database (KT #1)	Top Producer Strategies	Protecting your "why"	Performance Motivation
Your Social Media Message	Master Your Referral Relationships (KT #2)	Staying Positive	Master Your Marketing (KT# 3)	Lead Generation
Sales Excellence	Sales Presentations	Handling Objections	Master Your Networking (KT #4)	Business Planning with Confidence
Living with Purpose The 5 Well Beings	Master Your Calendar (KT #5)	Building a High Performance Team	Eliminating Toxic Habits	Pipeline Strategies
Building Your Personal Brand	Building Success Routines	Creating Magic	Maximum Effectiveness	Communication Strategies





NEXT STEPS / ON-BOARDING PROCESS



We want to hear from **you**.

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