



SANDY PACE
MARKETING & BRAND STRATEGIST

Delivering targeted brand messaging and strategic marketing solutions to drive sales success.

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**Hardscape Opportunity
Texas 2022 & Moving Forward**

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Market & Industry Insight, 2021

- 11% of all North American Landscaping Insurance policies purchased in 2021 were purchased in Texas
- California had the most landscaping companies in the top 100 earners in 2019, followed by Texas, Illinois, and Florida
 - Despite earnings, only 29% of all Landscaping Companies are located in the Western Half of the US
- 2021 showed 18% concrete paver sales growth YOY (2020 showed 9.2% increase YOY) in US (6.42% in Canada)
 - Residential use represents 80.4% of all sales
- Growing trends in manufactured and non-natural / low maintenance product
 - Recent legislation in California, Virginia and other regions bans small engine use by 2024, limited landscapers on regularly used equipment. Coupled with water restrictions and increasingly extreme weather across the country, end users / homeowners are moving toward manufactured outdoor living items and away from traditional majority green landscaping
 - 2022 focus in technology: autonomous mowers, substitute products like Alliance's Gator Base, etc.

Sourced through NALP, ICPI and:

[United States Landscaping Market – Growth, Trends & Forecast \(2020 – 2025\)](#)

[Landscaping Services Industry in the US – Market Research Report](#)

[2020 State of the Industry report](#)

[Landscaping services in the U.S. – statistics & facts](#)

[Occupational Employment and Wage Statistics](#)

[Landscaper Statistics in the U.S.](#)

[Grounds Maintenance Workers](#)

[Thimble Proprietary Data](#)

[National Association of Landscape Professionals](#)

[Mid-Year Check Up: Lawn and Landscape Companies Report on Their Revenue for 2020](#)

Suggested Priority Markets

City/Metro	Grow/Maintain/Enter	Hardscape Product Line	WHY?	Est. 2021 Sales*	Total Market Value**
North Texas / DFW	Grow	<ol style="list-style-type: none"> 1. Natural Stone 2. Keystone 3. Belgard 4. Travertine 5. Wasau 6. Hanover 7. Unilock 	Manufacturer plans solidified to expand capacity and build plants across MidWest, into OKC and North Texas	\$26.08 MILLION	\$32.6 MILLION
Austin / San Antonio	Grow	<ol style="list-style-type: none"> 1. Natural Stone 2. Keystone 3. Belgard 4. IPC 5. Travertine 6. Paveloc Plus 7. Wasau 8. Hanover 9. Travertine 10. Del Conca 	Huge potential with residential expansion across greater Austin area, commercial redevelopment across San Antonio and specifically wall product need in these markets	\$24 MILLION	\$33 MILLION
Houston and surrounding areas	Grow	<ol style="list-style-type: none"> 1. Keystone 2. Natural Stone 3. Travertine 4. Belgard 5. IPC 6. Paveloc Plus 7. Wasau 8. Hanover 9. Del Conca 	Expanded product capacity across North Texas will alleviate product shortages across southern cities. Houston and similar geographies are still increasing MHS usage as commercial development grows and extreme weather increases (PICP opportunity)	\$16.2 MILLION	\$20 MILLION

*represents manufactured product sales only

**all numbers pulled from ICPI's 2021 Contractor reports

Not represented: Unilock, Techo, Innovative Block, ABQ and PaveLoc Plus

Suggested Focus Products & Technology

Manufacturer	Product / Technology	Details	Launch/Grow/Maintain
Alliance	Gator Base	Base aggregate substitute, equivalent to 288 lb. of crushed stone, saving a minimum of 6" additional excavation. Manufactured for pedestrian applications such as patios, pool decks, walkways, etc.	Grow. Product has been out for a few years, but Alliance has great marketing materials and training / demos available. Most successful marketing of this product is via demos
Various	Synthetic Turf	Not only a high margin item due to it's distribution method (no need for overhead on product), but demand is growing from the west coast through the Texas market as extreme weather increases, watering restrictions expand, and concerns around lawn maintenance chemicals grow.	Launch / Grow. Most manufacturers do not have great associated marketing materials or campaigns ready, but are happy to donate product for demos, displays, etc. Need for collateral build out, training, and consistent use in demos
Various	Landscape Lighting as an immediate value ad to any hardscapes project	Increasing number of cities, municipalities, and home insurers are requiring certain levels of outdoor lighting for any post build or renovation of an outdoor living space. With increased competition in the landscape lighting sector, costs have buffered some against inflation and are easy upsells to homeowners.	Grow (expand share of wallet opportunity) Need for technical training and certification tracks
Belgard	Artforms Panel Systems, Modularity, & TrueColor Technology on all Origins and Dimensions product (Catalina, Melville, Lafitt)	Artforms: 2020 roll out of new, highly versatile panel product for outdoor living areas. Modularity / Origins & Dimensions: new shapes and textures to allow for highly creative landscape design, significantly improved installation and mixed single format design	Launch. Belgard has a national training tour specifically highlighting the launch of modularity and how it transforms product installation and hardscape design.

Competitor	Region	Hardscapes Focus Products	Contractor or Homeowner Focused Dealer?	Notes
Oldcastle Stores (7 locations)	Dallas, Frisco, Keller, Austin, Houston (3)	Belgard, Natural Stone, resale of aggregates and other bulk materials	Contractor with the exception of Brittmoore & Keller having extensive displays	Natural stone sales decreasing since 2019 with focused growth in Oldcastle Manufactured Product (Belgard, Techniseal, block, bagged and masonry product, etc.)
Site One (7 'Stone Center' locations)	DFW, San Antonio, Austin	Belgard, Keystone, Natural Stone	Mostly contractor facing but some have homeowner facing	Zero coverage in West Texas. Current Hardscapes locations are: Alpine Materials (DFW), All American Stone (College Station), Stone & Soil (Austin / San Antonio) 4, Daniel Stone (Austin). Working on growth in Houston
Dolese Bros. Co (OKC)	1 DFW, multiple Oklahoma	Belgard, Natural Stone	Contractor	Quarry, plant and distribution locations
The Ground Up	2 Houston & 1 Austin	Belgard, Natural Stone	Both	Main product sales are in bulk materials (mulch production, etc.)
Pool Corp (Horizon SCP SPP NPT)		Belgard, Keystone, Techo* , Natural Stone	Contractor sales only but also homeowner facing via extensive displays	*Currently only distributor of Techo for Texas
ASAP Stone & Landscape	2 Austin Locations	Natural Stone, Belgard	Contractor	Heavy natural stone, but planned growth in manufactured product
Ewing		Keystone, Natural Stone, Belgard	Contractor	Multiple locations across Texas but Hardscapes locations seem to be more successful in and around the Valley and Corpus Christi Markets
Jim Stone Co.	2 – Baton Rouge & Lafayette Louisiana	Belgard, Keystone, Natural Stone	Contractor	Anticipated to be up for acquisition in 2022
Champion Stone Company	North Houston (Tomball / Spring)	Belgard, Keystone, Rosetta Stone*, Natural Stone	Contractor	*Only large distributor of wet cast product in Market (non-exclusive)
Whiz-Q Stone	Fort Worth	Keystone, Belgard, Unilock*, Natural stone	60/40 Contractor / Homeowner	Pandemic & phased expansion of main building and display yard has brought about a lot more homeowner traffic at Whiz Q's site. Most sales are still contractor though. *Unilock exclusive for Texas
Collier Materials, Inc.	Marble Falls*	Natural Stone and Bulk Aggregates / Materials	Contractor	*Currently a quarry out of Marble Falls but is rumored to be looking into opening a location in Austin. Purchased all of Keller Materials inventory when the site closed Oct. 2021

Suggested Regional Events & Initiatives

Event	Dates	Target Attendance #	Target Attendees (contractors, dealers, Landscape architects)	Activation
Texas Nursery Landscape Association	August Expo	2,000	Contractors, Supplier partners	Booth & Sponsor
Store Customer Appreciation Events / Demos and Trainings	Monthly	20-30	Contractors, Landscape Architects, Pool builders, Home builders, and some related	CoOp & Event Host
Heritage Managed Training events (similar to a Belgard University or SiteOne University)	Quarterly	50 – 75 per event (with intent for rapid attendance growth)	Contractors, Designers / Specifiers, Landscape Architects	Event Host
Customer Round Tables	Various broken up by LOB, customer type and region (1 per type & location)	10-15 per event	Contractors, Designers / Specifiers, Landscape Architects	CoOp & Event Host
TSLA	April 2020	2,000	Builders, Contractors, Landscape Architects, Supplier Partners	Booth & Sponsor

Suggested Professional Association Affiliations & Related

Association & Related	Link to website	Members (Contractors, Landscape Architects, etc.)	Events
TNLA Texas Nursery & Landscape Association	www.tnlaonline.org	Landscape Architects, builders, contractors, pool installers, and related	Annual expo conference, regional meetings and CEU events
TSLA Texas Society of Landscape Architects	www.texasasla.org	Landscape Architects, builders, contractors	Annual expo conference, regional meetings and CEU events
TSA Texas Society of Architects	www.texasarchitects.org	Landscape Architects, builders, contractors	Annual expo conference, regional meetings and CEU events

Suggested Local Sales Activities & Marketing Initiatives

- Create a consistent customer journey
 - Store Planogram for hardscapes products, stone, pavers and displays
 - Ensure location marketing clearly communicates specific product specialties by site (ie Stone Yard, Bulk Materials, etc.)
- Focus on supplier partner opportunities to be stocking distributor
 - Differentiates from majority of hardscapes dealers with small to no hardscape yards
 - Better positions against direct (ie Keystone) or 2 step (Oldcastle stores) sales
- Build out a training program starting with lines of business but with significant cross over (ie Hardscapes and Lighting, Hardscapes and Irrigation, etc.)
 - Build customer loyalty through expanding qualified labor market, establish Heritage as a best in class “partner” to our customers
 - Grow share of wallet through training opportunities
- Potential - Leverage Pool Builder Business to expand Hardscapes sales pool deck, patio and walkway opportunities
 - Include Hardscapes product at every Pool site, build messaging to develop direct relationship with pool contractor as opposed to contractor / manufacturer

Belvoir Marketing

Brokerage Support: Best Practices, Processes,
and Procedures



BELVOIR

REAL ESTATE GROUP, LLC

Going Places

BROKERAGE / DEVELOPMENT / MANAGEMENT / INVESTMENT

Meet the Team: Marketing

Annemarie Price – Marketing Coordinator (Graphic Designer & Production / 100% Graphic Design)

- Design and Production of all Pitchbooks / Owner Presentations, Flyers, OMs, and other Belvoir Marketing materials (all design work in Adobe Creative Suite unless otherwise requested)
- Creating new templates for pitchbooks, flyers, OMs, etc.
- Graphic Design / Content creation for Social Media Graphics: LinkedIn, Instagram, Facebook

Caylin Hicks – Marketing Specialist (Digital Marketing Specialist/100% Listing Management)

Inventory Management:

- Tracking all Marketing Requests (Pitchbooks, OMs, and Flyers) in Microsoft Teams / Property Marketing Tracker
- Auditing all requests for completion and following up with appropriate party (broker or client) for missing data
- Once all data necessary has been collected, updating the property with an “effective date” for production
- Once materials are approved by both Broker and Client, uploading content to CoStar/Loopnet and Belvoir.net
- Weekly auditing of all online inventory, working with Brokers and (if applicable) their support staff to ensure all listings stay up to date

Social Media:

- Creating a fresh content calendar each quarter for LinkedIn, Instagram and Facebook. Coordinating with Annemarie to collect appropriate graphics and executing
- Featured Listings of property, branding, etc.

Other Digital Marketing:

- Working with Nate’s eblast schedule to ensure all new listings are e-blasted and content is timely
- Working with website / blog writer to ensure featured properties are highlighted on Belvoir.net / blog



Meet the Team: Brokerage Support

Nate Han – Transaction Manager (Broker Onboarding)

- New Broker Onboarding: Salesforce Training, Comps / GIS / ESRO Training
- CRM Maintenance and updates
- Eblast scheduling, design and deployment

Main Role: Market Intelligence, Contracts, agreements, and vouchers with a strong focus on development of technical applications in CRM and Pardot



Brad Smith – Sr. Financial Analyst (Subject Matter Expert / Broker Support on an As Needed Basis)

- Subject Matter Expert / Editor of Marketing collateral as needed
- Running Proformas when needed
- Strategic and business writing when needed

Main Role: Financial Analytics, modeling, underwriting, and cost analysis. Major focus on BGP / Investment side of Belvoir

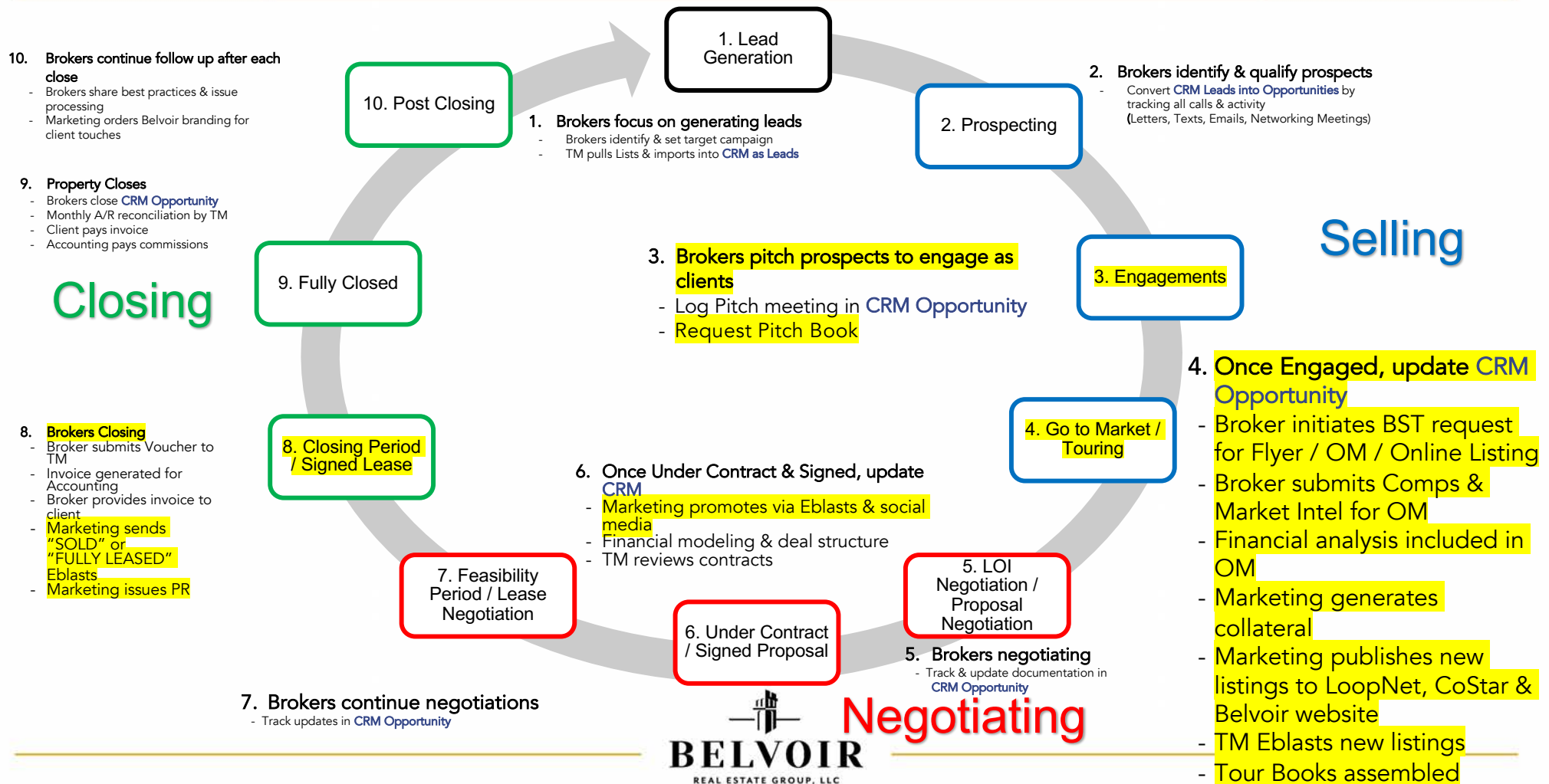


Varun Rajan – International Advisor (Marketing Request & Listing Support (Kyle & Nick ONLY))

- Salesforce - Ensuring all accounts for Kyle & Nick are accurate and up to date
- Submitting requests and supporting materials for Pitchbooks / Owner Presentations
- Submitting requests and supporting materials for New Property listings, flyers, OMs and any other marketing materials (scheduling Drone / Photography, any additional signage, etc.)



Sales Life Cycle



Go To Market



Initial Client Meeting Scheduled to understand Client needs (which will inform Pitch Book content)



Request for Pitch Book / Owner Presentation (including financial information like BPO and comps)



Signed Engagement / Listing Agreement Received (with minimum of 90-day exclusivity)



Information request submitted to seller & New Listing Request sent to Marketing



Approved Materials are sent to Print (and if applicable posted on CoStar / Loopnet / Belvoir.net)



Marketing promotes listing and property through E-Blasts, Digital Listing maintenance, Social Media, and other appropriate efforts

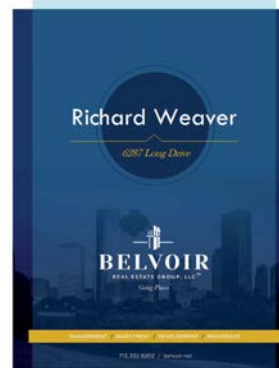


Closed / Sale: Marketing Promotes Listing Closure with Eblasts, Press Release and updated Broker Experience resume & Listing Status Sheets

← Ideal Process from Engagement to Marketing Launch →

Marketing Materials

- Pitch Books / Owner Presentations
- Broker Relevant Experience / Resumes*
- Broker Listing Status Flyers
- Property Flyers
- Expanded Property Flyers*
- Property Offering Memorandums
- Tour Books*
- Digital: E-Blasts, Social Media Graphics, Web Graphics, Belvoir.net
- Property Management Collateral (Brochures, Lease Listings, etc.)
- Press Releases*
- Generic Belvoir Branded Marketing Materials (including Glossy)



INDUSTRY DEVELOPMENT IMMEDIATELY INVESTMENT

Execute Your Commercial Real Estate Goals.

What defines your company? The right sized space? A second location? A second location? Taking the leap from lease to purchase and build-to-suit? No matter your goals, choose to work with one of the top commercial real estate companies. At Belvoir Real Estate Group, our commercial real estate brokers understand your needs, recognize opportunity to serve your business. Let our team of real estate experts provide your company the insight and assistance it takes to make your commercial real estate goals a reality.

As a trusted commercial real estate company, Belvoir is dedicated to putting together custom research, not off-the-shelf.

From the identification to professional site management, Belvoir commercial real estate means getting it done.

UNDER CONTRACT 2303 Lyons Ave Houston, Tx 77020 Whitehaven Houston Multipurpose site 6.89 Acres	SOLD 5645 Norddale St Houston, Tx 1.3 miles from 410 Loop Industrial with Office 46,100 SF	SOLD 408 Jensen Dr Houston, Tx Located near East River Project off of 49 & 110 For Sale & Lease +/- 13,000 Bldg SF
FOR SALE 474 Hwy 6 South Houston, Tx Located in Opportunity Zone Development Opportunity 2.47 Acres	FOR SALE 979 Drennon Rd Courtone, Tx Built-to-suit industrial 0.5 miles from 145 Investment Sale 6.95 Acres	PURCHASED 7119 Kindred St Houston, Tx Will be used as a distribution center Procurement Representative +/- 8,500 SF

SENIOR ASSOCIATE
 Mike Fischer
 15335 Park Ten Place St 150 Houston, TX 77024 | mfisher@belvoir.net | (713) 332-0215 |
 The commercial real estate group.

3 BUILDING INDUSTRIAL PORTFOLIO
 10 Year Sale-Leaseback | Warehouse and Manufacturing | For Sale

Marketing Request Forms: BelvoirMarketing.WuFoo.com

One central, online location for all marketing requests including:

- Pitch Books / Owner Presentations
- Offering Memorandums
- Flyers & Expanded Flyers
- Broker Relevant Experience / Resume Request
- Broker Listing Status Request
- Any other graphic design or marketing material needed

New Property Listing Request Copy PUBLIC 0 Created: 12/02/2020 Modified: 12/02/2020	0 Entries Today	0 Total Entries
Pitch Book / Owner Presentation Request Form PUBLIC 0 Created: 12/02/2020 Modified: 12/02/2020	0 Entries Today	0 Total Entries
Miscellaneous Marketing Request Form PUBLIC 0 Created: 12/02/2020 Modified: 12/02/2020	1 Entries Today	1 Total Entries

Marketing Request Forms: BelvoirMarketing.WuFoo.com

Forms include fields to answer all listing / client / marketing related questions as well as upload:

- Financial information such as BPOs
- Leasing Comparable
- Relevant Experience
- Photography

Once submitted, forms go to BST@Belvoir.net automatically, but also get stored in Wufoo's cloud for easy reporting

Project	Address	Broker	Form Completed	Marketing	Seller Info	Client Contact Info	Form Submitted	Effective Date	Deadline Date	Collateral Type
Portfolio Sale	123 Main St	BJS	Yes	On Market	Yes	Yes	1/1/2021	1/1/2021	1/15/2021	Flyer & OM
Lathrop & Black Gold		MTG		On Market						Flyer & OM
851 N FM 3803 RD E	Conroe, TX 77303	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
3125 N Main	Baytown, TX 77521	SH	Yes	On Market			11/20/2020	11/20/2020	11/20/2020	
Denmark (Investment)	12777 Jones Road Houston, TX 77070	MTG	NA	NA	NA	NA				
5381 W 42nd Street	Odessa, TX 79764	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
11633 Spring Cypress	Tomball, TX 77377	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
23540 Coons Road	Tomball, TX 77375	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
6206 Bayway Drive	Baytown, TX 77520	SH	Yes	On Market		Shahriar Khan	11/19/2020	11/20/2020	11/20/2020	OM
19920-19960 N Hwy 242	Conroe, TX 77306	DS					10/13/2020			
10611 Palestine	Houston, TX 77029	DS					11/30/2020	11/30/2020	11/30/2020	
6910 Sterns Street	Houston, TX 77021	GC					11/30/2020	11/30/2020	11/30/2020	
18700 Hwy 59	New Caney, TX 77357	DS					12/1/2020			
2350 Security Forest Drive	Conroe, TX 77306	DS					12/1/2020			
19711 Aldine Westfield Road	Humble, TX 77338	NS	Yes	On Market	Yes	Yes	12/3/2020	12/3/2020		
6827 Long Drive	Houston, TX 77087	GC					12/1/2020	12/1/2020	12/3/2020	Pitch Book

Wufoo
By Wufoo.com

New Property Listing Request

Please fill out this form for any and all new property marketing material/listing requests (both on and off-market)

Client Name *

First Last

Client email *

Client Phone Number *

- -

####

New Listing Address

Type of Collateral Needed *

Flyer

Other Materials Needed *

Point of Interest Map

Signage: Single Sided

Signage: Double Sided

Instagram & Facebook Campaign

Linked in Campaign

Other (specify below)

Photography (Located in R:\3-Marketing) *

Drone (to be paid by broker)

Marketing Request Process



Pitch Book /
New Listing /
Misc. Request
form comes in
through
WuFoo



Request is input
into BST
Microsoft Teams
Project Tracker
to go into
Marketing Que



(If Applicable)
Any missing
materials are
tracked down by
BST and request
is given an
"effective date"



Marketing
Materials are
sent to Broker
first (and if
applicable
then to client)
for final
approval

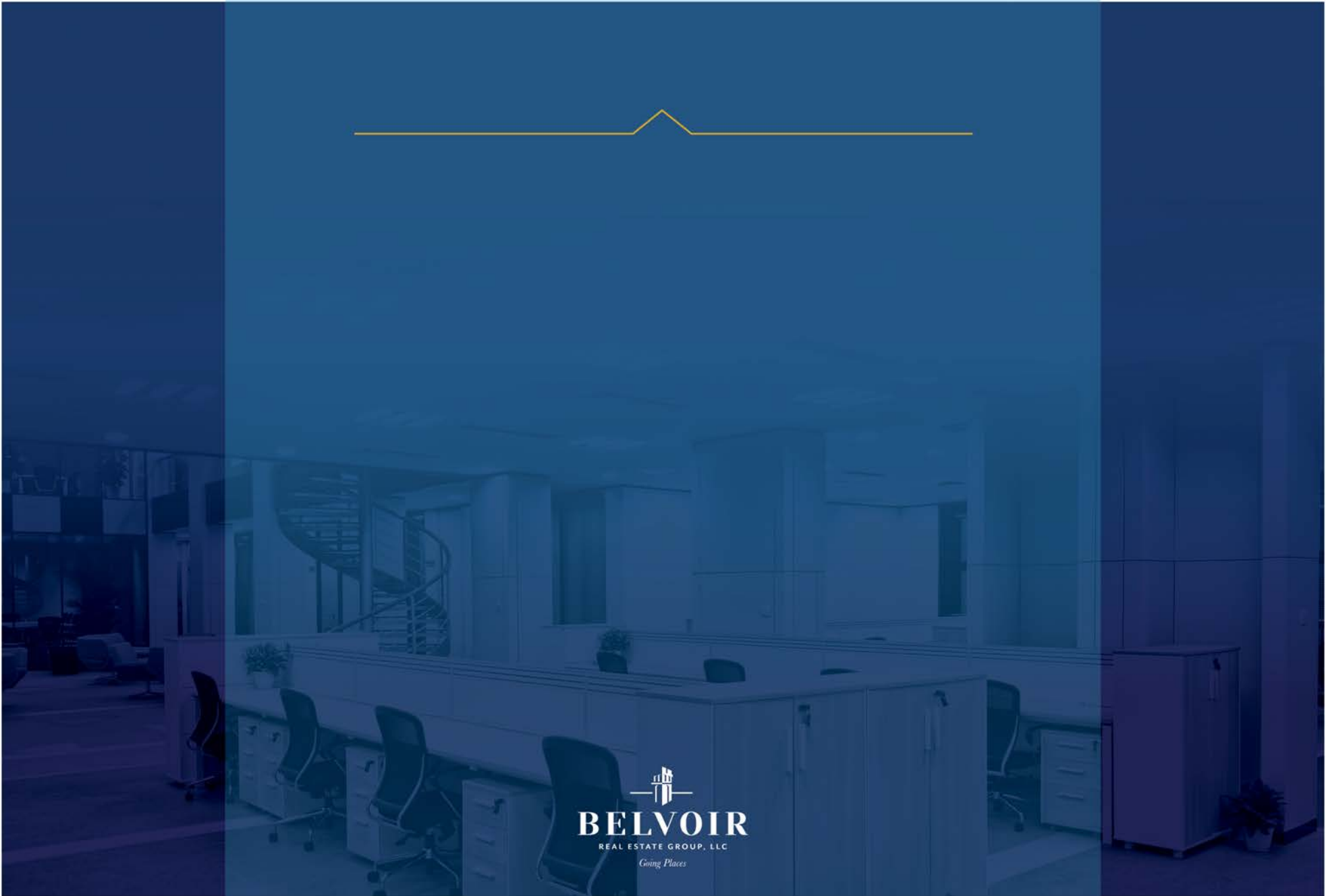


Approved
Materials are
sent to Print and
(and if applicable
posted on
CoStar / Loopnet
/ Belvoir.net)



Listing Maintenance

A weekly report of all
listings is pulled for
accuracy and updates
with the BST partnering
with Brokers to ensure
any changes are made
to digital listings and
marketing materials




BELVOIR
REAL ESTATE GROUP, LLC
Going Places

Belgard University

Setting the new standard in hardscapes education

BELGARD[®] | PAVES
THE WAY™

DEFINING SUCCESS: Elevating the name of Belgard University

Belgard University's number one goal is to educate and share thought leadership with its customers (contractors, dealers, owners) in order to help their business be more successful.



BELGARD® | PAVES THE WAY™

BELGARD® PAVES THE WAY™ FOR OUR PARTNERS

Through Belgard University, we have an opportunity to demonstrate that “Paves the Way” is more than just a brand tagline; it’s also how we support our customer’s business.

ACTIVATION INCLUDES:

- Introduction of a new Belgard University look and feel to our customers and prospects
- Showcasing our industry-leading knowledge by providing counseling, support and expertise to our customers through
 - Product
 - Program & Tools
 - Business acumen
- Use enhanced materials and consistent communication timelines to guide and empower our sales teams with consistent and industry leading content



Belgard U: A New Look & Feel



BELGARD® | PAVES THE WAY™

BRAND VALUES

Aspirational, Achievable, Enduring

MESSAGING TONE

Bold, Empowering, Energetic, Emotional

PROGRAM COLORWAY

Navy, creams and a silver/gray form the foundation for the Belgard brand.



<p>PMS 295 C C 100 M 83 Y 44 K 45 R 10 G 41 B 61</p>	<p>PMS COOL GRAY 1 C C 9 M 5 Y 11 K 0 R 230 G 231 B 223</p>	<p>PMS 429 C C 38 M 28 Y 27 K 0 R 150 G 155 B 150</p>
	<p>PMS WARM GRAY 1 C C 15 M 11 Y 16 K 0 R 215 G 209 B 204</p>	<p>PMS 877 C Metallic for print only.</p>

PRIMARY COLORS

Navy, creams and a silver/gray form the foundation for the Belgard brand.

Belgard U: Tiers/Event Categories



PRESENTED BY:  BELGARD UNIVERSITY

- Half day events
- Hands on product training
- Catered breakfast or lunch
- Hosted either at an APG site (ie Coastal or Jewell store) or dealer partner (ie SiteOne)



PRESENTED BY:  BELGARD UNIVERSITY

- Includes prescribed agenda such as a State of the Industry Opener by Market's President or VP
- 65-75% Education, 35-25% Customer Appreciation
- Customer Awards
- Full to Multiple Day events
- Catered breakfast or lunch
- Example: Adams West and East events



PRESENTED BY:  BELGARD UNIVERSITY

- High end events such as golf tournaments, suites at sporting events, customer trips, etc.
- 90-95% customer appreciation with majority of education occurring in post event communications (emails and digital outreach)
- Examples: GMS Winter Hunting Trip, Sierra Golf Tournament

Belgard U: Audiences & Event Goals

Demo Days

Fore/Crewmen & Installers



GOALS:

- Intro to hardscapes industry and business
- Recruit and convert customers to Belgard; begin brand loyalty
- Train on new/upcoming products and install
- Business fundamentals (i.e. job costing, bidding, sales cycle, etc.)

Professional Partnership

All Audiences



GOALS:

- Professional development, growth and encourage Belgard usage
- Product/program promotion and training
- Industry and association training/engagement – ICPI/NCMA
- Business development, trends and tools (i.e. HR, banking, financing, real estate, safety)
- Both contractor and dealer tracks

Leader's Circle

Owners & Managers



GOALS:

- Customer appreciation for loyalty
- Relationship building
- Awards/celebration; recognition of partnership
- High level education on “what’s next” for Belgard
- Belgard Advisory Council membership



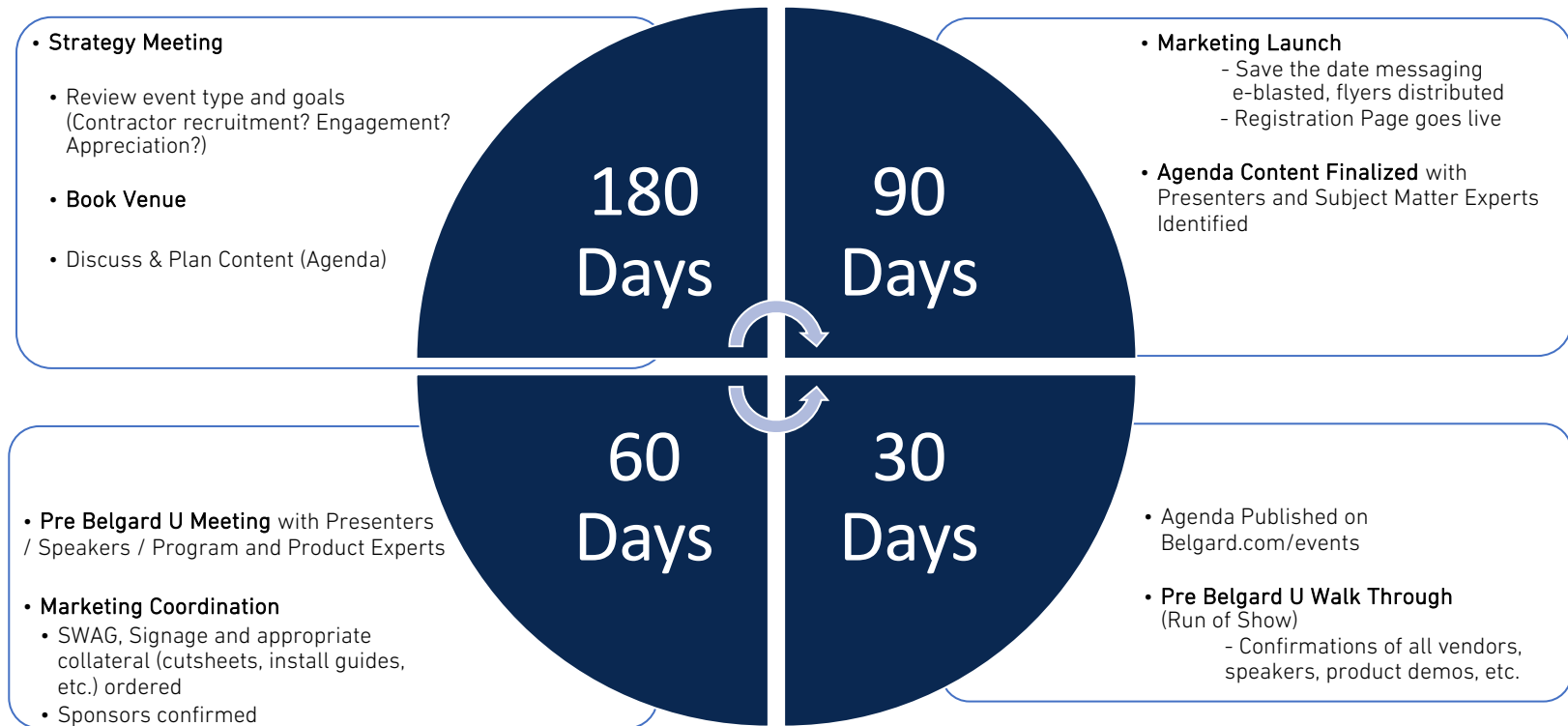
2020 PLAN, GOALS & DELIVERABLES

BELGARD® PAVES THE WAY

Cadence of Rollout/Areas of Focus

1. Launch refined Belgard University branding/look and feel
 - Event Categories
 - Logos
 - Collateral
2. Launch Belgard Residential Portal Training Resource (Internal Use)
 - Online, 24/7 accessible internal library of content, training and resources
 - Convenient, easy, on your own terms
3. Work with agency partner (Interrupt, others) to build out Belgard University Program Guide (AKA: the “Belgard U Bible”)
 - Event options
 - When to conduct; how to conduct
 - Event coordination, set up, topics, etc.
 - Promoting and obtaining participation
4. Develop future game plan for more holistic approach – demonstrating how Belgard U, contractor/dealer programs and other branded offerings add value to our customers
 - Create external facing Belgard University portal to serve as an education supplement to attendees and resource for those who cannot attend
 - Implement post-event engagement strategy including quarterly educational emails, webinars and living calendar of Belgard University events that customers can reference for follow up events and complementary learning

Belgard U: Planning & Communication Cadence



Post Event Survey Distributed to Attendees and Internal Debrief to occur within 1 week of event

Belgard U: Communication Templates



CLOCKWISE:
Save the Date mailer,
event agenda, raffle
ticket and LinkedIn
post graphic



Immediate/In-Progress Action Items

- Launch of refreshed Belgard University branding, collateral and templates
- National audit to document current and recent programs from all Oldcastle APG companies
 - Identify best practices
 - Determine areas of improvement
- Perform industry and competitive analysis
 - Attend competitive events with current (non-exclusive) Belgard customers to gain insights
 - What are they getting right/wrong?
 - What could we replicate/improve upon?
 - What gaps or opportunities exist – Belgard can fulfill?
 - Manufacturers, programs and/or events to evaluate
 - Techo Product Showcase
 - EP Henry
 - Cambridge
 - Nicolock
 - Unilock

Thank You.

Questions & Discussion



Alliance Pavers launches Homeowner Design Center

Recognizing a quickly growing customer base with direct to homeowner marketing, Alliance Pavers aims to provide a best in class experience for central Florida new and prospective homeowners interested in outdoor living

Customer: Alliance Pavers is Central Florida's premier hardscapes contractor, having grown over 25 years to employ 20 skilled crews servicing both commercial and residential projects. Working with both builders and directly with homeowners, Alliance Pavers has pivoted focus to accommodate the ever-changing economic climate and ensure quality installation and experience for every project size or type.

Market: Coastal | Oldcastle APG, a CRH Company

Introduction: As Florida's construction market recovered from the downfall, demand for paver projects with both tract homebuilders and commercial GC's soared, leaving the average homeowner with minimal resources for outdoor living renovations. Due to demand, most manufacturers and contractors focused on these customer types from 2016 on and – in my experience in market – still largely focus on them.

Having seen the impact of the Great Recession on Florida's market, I was eager to speak with Alliance Pavers owner Jeff Lane about the customer types he'd served over his 25 years and their evolution. After successfully forming and executing strategy to ensure Alliance Pavers stand out amongst competition with their homebuilder customers, our conversations in 2017 led to a firm wide desire to return service to their original customers – homeowners looking to renovate their existing drive and walkways, pool and outdoor living areas.

Solution: Leveraging Belgard's Design Studio Programs and working with the local sales team, I was able to help Alliance Pavers create an onsite outdoor display area that would serve not only as a physical catalog of product for homeowners, but an event and Design Center that customers could traffic to get inspiration, ideas, and – working with Belgard – digital renderings of potential projects for their space.

With a consumer marketing focus, I worked with the national team to pull "As Seen In" signage and collateral that spotlighted Belgard's sponsorship of both the HGTV Dream Home, as well as Coastal Living and Southern Living Magazine Idea Homes. Identification badges were placed throughout the display on items used in feature homes, and copies of the corresponding periodicals (with marked Belgard product) were distributed to homeowners alongside invites to the Grand Opening.

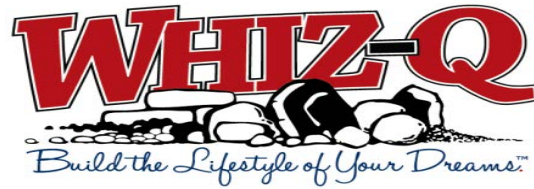
Action: Launching Alliance Paver's new, homeowner focused marketing program included:

- Targeted social media and email drip campaigns across Central Florida teasing at Alliance Paver's new design center opening and an accompanying series of homeowner design and DIY events
- A formal press release to local media outlets promoting the Grand Opening and Design Center services of Alliance's new display and outdoor design center
 - o Mention of Belgard being a locally manufactured product (with two plants in the area, and upcoming expansions bringing jobs to Central Florida)
 - o Working with a media partner to identify top zip codes and developments, mailed invites that included HGTV Dream Home, Coastal Living and Southern Living Idea Home collateral were distributed to key prospective customers
- Customized Collateral and Co Branded Signage for Alliance featuring key Belgard pavers and outdoor living elements
- Two executed Grand Opening Events in April and May of 2018: a VIP Cocktail hour for Central Florida designers, landscape architects and professionals, as well as a fully homeowner focused event that offered free design services, activities for children, a food truck and raffle prizes.

Results: With the opening of the Display and Design Center, Alliance Pavers began servicing homeowner and designer traffic that steadily grew month over month through 2018 and 19. As of last report (Winter 2019/20), Alliance averaged 7-10 customers per week using the display and design services to move forward with a residential project.

Statistics & Conclusion: Through both the offering of design services and outdoor display, and the new consumer focused marketing campaign, Alliance reported a 35% growth YOY in residential projects following their Belgard Design Center grand opening.





Whiz-Q Stone announces partnership with Belgard Hardscapes

Providing national attention at a local level helps Jewell | Oldcastle expand their distribution footprint in a critical partnership with one of DFW's top Hardscapes Dealers.

Customer: Whiz-Q Stone, the Dallas/Fort Worth Metroplex's largest selection of Natural Stone, Landscaping Supplies, and Outdoor Living Products. Located just outside of Fort Worth, Whiz-Q was founded 30 years ago by Jim Whisenand, has expanded from a starting location of 3 to over 22 acres, and continues to be run by family (sons and grandson Mike and Derek) today.

Market: Jewell | Oldcastle APG, a CRH Company

Introduction: With only 2 manufacturing sites in their large market (Louisiana, Oklahoma, Arkansas and all of Texas), Belgard is in a precarious position against top competitor Pavestone to have product readily available and stocked across the region. This limited capacity necessitates strong partnership with dealers and distributors across the region to stock product. While Belgard is available and sold out of 7 Jewell | Oldcastle owned stores, large footprints across the region went underserved and lost share of market to Pavestone and other top competitors.

A top North Texas Hardscapes Dealer, Whiz-Q, spoke with Belgard leadership on and off for almost a decade to determine if Belgard would be a good fit across their already stocked Unilock and Pavestone product offerings, but Whiz-Q ownership had strong concerns about the customer service of Belgard at the local level.

Solution: By fostering a national marketing support relationship with owners Derek and Mike Whisenand, I was able to present to Whiz-Q program and product support that brought confidence to a partnership with Belgard.

Action: Though multiple conversations I created a strategy for the partnership launch that included:

- A drip campaign across North Texas teasing at Belgard's stocking expansion into Fort Worth (where Whiz-Q's yard is located)
- A formal press release and launch of the partnership in January of 2020 at North Texas Belgard events, in local media, and online
 - o Mention of Belgard being a locally manufactured product as well as Whiz-Q's impending expansion bringing jobs to Fort Worth
 - o Formal Announcements to the trade at Belgard University events February 18th, 20th, and March 5th
 - o Formal Announcement to Homeowners at the Fort Worth Livestock Show (month long event February 2020)
- Customized Collateral for Whiz-Q featuring key stocked Belgard pavers and outdoor living elements such as a fireplace, grill islands and firepit kits.
- Designs and coordination for product installation in a newly expanded outdoor display that would be launched to both the trade and homeowner customer in two audience specific events to occur in April 2020 (events did not occur due to pandemic, but product and displays were installed)

Results: While immediate results showed at the Jewell | Oldcastle level through the ordering of over 50 trucks of product, local impact at Whiz-Q was unprecedented.

In lieu of the planned Grand Opening events targeting trade and homeowner customers, Whiz-Q remained open for business during quarantine as they were nationally deemed “an essential business” and Texas government allowed contractors to continue to work. Having had advertised their new display through the invitations for their Grand Openings, homeowner traffic increased from 15% to 65% month over month in March, April, and May of 2020.

Statistics & Conclusion: Sales of Belgard Hardscapes products were immediately successful but have grown 15-30% month over month since stocking launch with Whiz-Q in February of 2020 and continue to grow.

More importantly, the relationships developed with Whiz-Q ownership have given Jewell | Oldcastle better insight into larger opportunities with TNLA (Texas Nursery Landscape Association), the HNA Council (Whiz-Q owner Derek Whisenand serves on their board), and more, local, opportunities that would not have been gained without their partnership.



Portfolio of Work



HGTV DREAM HOME
 Belgard is a proud sponsor of the HGTV Dream Home 2017 in the picturesque St. Simons Island, Georgia. The home features a stunning pool deck, outdoor entertaining features as well as a stately driveway and front entry way.

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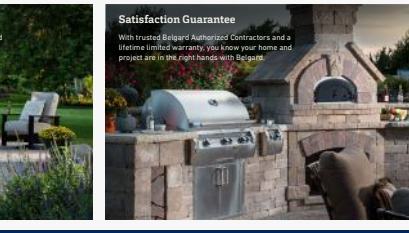
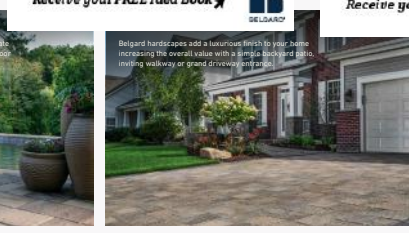
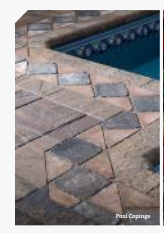
The HGTV Dream Home 2017 Sweepstakes begins today – enter for a chance to win this gorgeous home on [St. Simons Island, GA](http://StSimonsIsland.GA). Plus, you can enter daily until 2/17 for more chances to win!

Don't miss the HGTV Dream Home special airing on **New Year's Day** to get a complete look at this stunning home! Check your local listings for the time.

ENTER TO WIN

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GIVING MORE THAN EVER
The Community Foundation for Greater Atlanta sets a big goal

CENTENNIAL SPOTLIGHT
A look back at 100 years of JLA training

J | L | A

A LEGACY OF PROVEN LEADERSHIP



LIBATIONS

Setting a High Bar

Atlanta's Eventide Brewery is as interested in helping the community as it is in creating delicious craft brews

By Sandy Pace



Left: three of Eventide Brewery's owners and founders, Nathan and Haley Cowan, and Geoffrey Williams. Below right: Eventide features handmade wooden beer taps in the tasting room.

WHEN THINKING ABOUT THE FOUNDERS AND ARCHITECTS OF A CRAFT BREWING business, a woman's face doesn't traditionally come to mind. But beer lover and Georgia native Haley Cowan happens to be a co-founder as well as the face of Atlanta-based brewery Eventide. In 2012, along with her husband, Nathan Cowan, and friend Geoffrey Williams, Haley created Eventide, born from a foundation of friendship and love of good beer. The trio met at Georgia Southern University, and their early food and beverage experiments included homemade pickles, mustard, cheese and beer. They quickly realized that what started as a passion project had the potential to grow into a larger company and even a full-time brewing business. Mathew Swozey, the fourth founder of Eventide, helped by contributing product design and branding. After moving the company into its Grant Park headquarters in January 2014, Eventide officially launched as a craft brewery, with a tasting room, an event space, and statewide product distribution. The brewery now distributes Kolach and Pale Ale throughout Georgia.

In addition to working on her Doctor of Pharmacy degree on the side, Cowan serves as Eventide's brand manager, working to maintain sales relationships with distributors while supporting existing accounts and scouting new opportunities. When not focusing directly on developing the brand, Cowan and her team are advocates for local community development. In addition to providing grants to charities around

Atlanta, Eventide hosts The Curiosity Club, unique seminars benefiting The Homestead Atlanta by offering monthly courses on everything from herbal medicine to biodynamic farming. With the goal of helping



EVENTIDE'S SEASONAL ALES

Early fall:
Red Headed Haley (This malty and delicious red ale named after founder Haley Cowan is perfect for autumn.)

Mid fall:
Highlander (strong Scotch ale)

Winter:
Kattegat (Baltic porter, recommended for wine drinkers)

Spring to summer:
Citrus Grove (lemony, light Hefeweizen)



ART

Diminutive Delights

Tiny Doors ATL has encouraged a vibrant network of Atlanta artists to make their mark on the city

By Sandy Pace



King of Pops

BeltLine Skatopark

Krog Street Tunnel

Inman Park Pet Works

FROM THE FIRST INSTALLATION IN JULY OF 2014, TINY DOORS ATL HAS ADDED ITS TOUCH ON landmarks throughout the city and has changed Atlanta's art scene one tiny detail—or door—at a time. With the idea of encouraging imagination and bringing big wonder to small spaces, Tiny Doors ATL co-founders Karen Anderson and Sarah Meng installed the first official door at the Krog Street Tunnel with feelings of hope and fear. Their goal was to create free and accessible art that reflects and engages the city. "The cement dried. And then I waited," Anderson later told a TEDxEmory audience. Afraid that no one would notice the door—or worse, that it would get destroyed or painted over—Anderson was pleasantly surprised as contributions from other artists quickly began appearing in front of the door. First, there was a miniature to-go box of biscuits from a local restaurant, then jack-o'-lanterns, then a tiny

newspaper and a herd of tiny cats waiting to go inside. Motivated by the success of Krog Street's tiny door, Anderson and Meng teamed up with a group of local volunteer photographers, journalists, graphic designers, web designers and lawyers to build more doors and continue to inspire curiosity and exploration by highlighting neighborhoods and landmarks that make Atlanta unique. Customized to fit specific places in the city, Tiny Doors ATL creates unique structures for each location and partners with the adjacent businesses and organizations to best represent an



Miltown Arms Tavern

Paris on Ponce

Tree Door

Krog Street

PEACHTREEPAPERS



COMMUNITY Champions

How JLA advocacy shapes effective leaders

NIGHT TO REMEMBER
Recapping the Centennial Gala & Lawn Party

DELICIOUS TRADITION
Two decades of The Tour of Kitchens



Portfolio of Work

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D.R. Horton is proud to offer the Main Street StarsSM program in recognition of the people who contribute to the success, well-being and security of citizens across the United States. We appreciate that the military, law enforcement, firefighters, healthcare and education professions demand dedication and may frequently require personal sacrifices. As our way of saying, "Thank you for all you do," we are offering this special program to help bring you one step closer to the American Dream of home ownership.

Main Street StarsSM will receive \$2,000 towards their new home options in our Design Center!

As our Main Street Star, buy a townhome or home in any D.R. Horton Atlanta, Middle Georgia, or Columbus community, and we will give you \$2,000 discount towards personalizing your home at our Design Center.

Photos: Photographic, floor plans, elevations, finishes, colors and design are approximate to illustration appearance and will vary from the home as built. *Home and community information, including pricing, included features, terms, availability and amenities, are subject to change and prior sale, anytime without notice or obligation. **Professional design-discount may not exceed \$2,000. Main Street Stars promotion valid only on new contracts for homes in D.R. Horton Atlanta, Middle Georgia and Columbus Communities and expires on 11/30/2012 through 1/30/2013 and closed on 1/31/2013. Main Street Stars promotion does not include the purchase of new homes. Discount subject to availability. Main Street Stars promotion is subject to change without notice and is available only at closing, and is not redeemable for cash or other credit. See sales representative for complete terms and conditions. *Professional discounts apply to the current top 1000 options and upgrades available through the Design Center and available by the purchase. Design Center options and upgrades are subject to availability between the start of construction. See sales representative for details. © 2011 D.R. Horton.



& CHEESE

Homeowner ing

Amy Hartzell 404.831.1931, ahartzell@drhorton.com

Portfolio of Work



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The Advance Connection

Another Successful Year

Delivery, Tara Harper, is clearly in control of the resources that matter. She and our President and COO, Todd Zebrowski, ensure that IBBS customers truly get first priority over everything – as it should be!

Learning about BBX

Watching you and your employees use BBX has helped me learn what we can do better and what is really important. We have refined our roadmap and, now that we will soon be 100% on a single platform, we intend to accelerate investment in the product. Everything from a new user interface, tighter integration with our SIPs voice tool, device provisioning via a new biller gateway and a mobile app are now under development.

Learning about what you want

I have heard you all loud and clear this year and appreciate the direct feedback. I have listened to wonderful reports on how much you appreciate our employees and hope that you understand that I feel the same way about them. I know we can get better as far as network availability, and will strive to improve that in the new year, especially as your commercial marketing efforts gain momentum. At IBBS, the key to our success lies in having our highly skilled employees function as an extension of our customers' operations, and I am confident that our team can continue to help advance your businesses in 2013.

I hope your 2012 was prosperous and profitable, and I look forward to working together in the coming year.

Mike Gallagher@ibbs.com
678-399-9496

IBBS CEO, stable

network

side of the equipment ble network in learning to in our s with coax e routers ars, I was u who have g) and year, thank a patience on work

at The s customer that is g closely t IBBS, Director nvoice

In This Issue

Fast Forward
Learn more about IBBS Professional Services and our conversion process.

Expertise @ Work
Meet Greg Hood and Nicole Glacier, who have been integral in many IBBS conversions.

Marketing Buzz
Read about low-income campaign success stories shared at the CTAM Summit and learn more about our upcoming events.

Resources
This is just a reminder about our holiday hours between Christmas and the New Year. While IBBS will continue to provide expected levels of customer support, we request that all non-critical or non-emergency activities be scheduled prior to and/or after the designated holiday window: **December 24, 2012 - January 4, 2013**

As always, we will provide 24/7 customer care, NOC, and engineering support for critical issues to serve you and your subscribers.

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- Central Valley Cable
- City of Dunellon
- Senior TV

We're excited to have you join the IBBS Family!

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Strategic support for communications, sales enablement, and customer retention.

Communications strategies
Newsletters, tip sheets, product release info, trade show campaigns & emails, etc.

Sales Enablement materials
Layout & design, web & print

Product support
E-brochures, PPTs, campaigns

Customer Retention
User Advisory Council meeting, trade show events, external communications

Portfolio of Work



CONCORD PARK
FEBRUARY 24, 2012

W.G. YATES & SONS CONSTRUCTION COMPANY
Atlanta, Georgia

4401 Northside Parkway, Suite 700 | Atlanta, GA 30327
Phone: 770.399.1919 Fax: 404.949.0426

AIA Document A305™ - 1986

Contractor's Qualification Statement

The Undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading.

SUBMITTED TO: Mr. Miller Harper
East West Partners
ADDRESS: 25 Calhoun Street, Suite 320
Charleston, SC 29401

SUBMITTED BY: W.G. Yates & Sons Construction Co., Inc.

NAME: Jeff Cross, Sr. Vice President Atlanta Division

ADDRESS: 4401 Northside Parkway, Suite 700
Atlanta, Georgia 30327

PRINCIPAL OFFICE: One Cally Avenue
Philadelphia, Mississippi 39350

- Corporation
- Partnership
- Individual
- Joint Venture
- Other

NAME OF PROJECT (if applicable): Concord Park
TYPE OF WORK (file separate form for each Classification of Work):

- General Construction
- HVAC
- Electrical
- Plumbing
- Other (please specify)

- ORGANIZATION
- How many years has your organization been in business as a Contractor? 48

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An Addendum and Deletion Project that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A checklist in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This form is approved and recommended by the American Institute of Architects (AIA) and The Associated General Contractors of America (AGC) for use in evaluating the qualifications of contractors. No endorsement of the submitting party or verification of the information is made by AIA or AGC.

Key Personnel - Similar Projects



Oceana Palms

3200 North Ocean Drive, Riviera Beach, FL 33404

g) Marriott's Oceana Palms is a magnificent 19 story tower with 236,000 square feet of luxury accommodations. The resort/hotel consists of 13 floors of villas over six floors of parking and common areas which include a play ground, an oceanfront restaurant and marketplace, climbing wall, four swimming pools with water features, and a spa facility. The beautifully landscaped resort also includes a children's activity center and fitness center. All 76 villas are two bedroom, two bathrooms, fully furnished, with high end finishes including granite countertops, tile and carpet throughout. Each villa has a balcony and ocean views.

h) Oceana Palms was completed on time, with a project start of February 1, 2008 and completion of September 1, 2009.

i) The project did not result in any disputes, arbitration, claims or litigation with the owner.

j) Twenty One (21) change orders were associated with the contract.

k) The total cost of these change orders was \$2,245,747.75.

l) Please see the attached AIA 305 Projects in Projects list as part of the AIA A305 Documentation.

Owner Information
Marriott Ownership
Al Morelock
(407) 513-6845

Architect Information
SB Architects
Kevin Dunn
(305) 856-2021

Civil Engineers: Kimly Horn
Sal Santoni 954-935-5100
MEP: HNGS
Lynique Suarez Jr., 305-270-9935



THE BORGATA HOTEL ATLANTIC CITY, NEW JERSEY



CLIENT:
Bord Gaming Group

ARCHITECT:
Mermel Corras Architecture

PROJECT DURATION:
October 2000 / July 2008

SIZE:
4,000,000 SF

DESCRIPTION:
Three Phases including High-Rise,
Low-Rise and Parking Garage

45 Stories
5,000 Rooms & Suites
11 Retail Shops & 11 Restaurants
80,000 SF European Spa
2,400 Seat Events Center
1,000 Seat Theatre
7,100 Space Parking Garage
Five River Restaurants
136,000 SF Casino

AWARDS:
ABC Merit Award

CONSTRUCTION COST:
\$1.2 Billion



"It has been a pleasure working with the YATES team and it has been a very successful project from my perspective."

Kevin J. Sullivan
Sr. Vice President
Borgata Hotel and Casino

PROJECT OVERVIEW

The Borgata Hotel, Casino and Spa is a classic example of how YATES partners with other professional firms to build award-winning projects. YATES formed a joint venture with Tishman Construction Corporation of New York City to build the 2,002-room resort. The Borgata is the largest hotel in New Jersey history as well as the state's tallest building, with 45 stories.

Guest rooms include floor-to-ceiling windows and a spacious bathroom with a shower for two. Suites include a natural rich wood foyer, and deep soaking tubs. The largest suites are 1,600 SF with imported marble vanities, a separate powder room, and multi-media entertainment center.

The Borgata, a joint venture with Bord Gaming Corporation and MGM Mirage, has eleven retail shops and just as many restaurant lounges as well as a 136,000 SF casino. A 2,400-seat event center and a 1,000-seat theatre add to the unique design of the facility. A European spa at the Borgata covers over 80,000 SF and has quickly become a major part of the hotel's amenities.



The Yates Companies, Inc.



Certifications & Recommendations



This Certificate accredits that

Sandy Drago

has successfully completed our

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The Interlocking Concrete Pavement Institute acknowledges that

Sandy Pace

is recognized as a

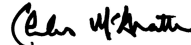
Concrete Paver Sales Technician

Date Issued: January 15, 2020

The ICPI Concrete Paver Installer Course provides education on the construction of interlocking concrete pavements. This document conveys that the above-named participant has passed the Concrete Paver Installer Course and has met the minimum sales experience required by ICPI for this designation.



ICPI Education Committee Chair



ICPI Executive Director





Record of Completion

The Interlocking Concrete Pavement Institute acknowledges that

Sandy Pace

has attended the course and passed the examination for the

Concrete Paver Installer Course

The ICPI Concrete Paver Installer Course provides education on the construction of interlocking concrete pavements. This Record of Completion conveys that the participant named above has attended the course and earned a passing score on the exam.

A handwritten signature in black ink, appearing to read "Tom Jan", positioned above a horizontal line.

ICPI Education Committee Chair

A handwritten signature in black ink, appearing to read "Cher W. K...", positioned above a horizontal line.

ICPI Executive Director



Interlocking Concrete Pavement Institute [↗](#)

Concrete Paver Installer Course Record of Completion



