

# FREEDOM FORUM 2023

GLOBAL • LOCAL  
REMARKABLE



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**February 19-24, 2023**

The Westin Cape Coral Resort  
at Marina Village

5951 Silver King Blvd  
Cape Coral, FL 33914



# A SPECIAL WELCOME FROM LOUIS

It's time to gather again for my favorite event of the year – FF23 Freedom Forum! I'm excited to see you in Cape Coral, FL and look forward to trading stories from the past year, as well as scheming towards an amazing 2023 ahead!

FF23 Freedom Forum is the largest event we have ever had, with international franchisees joining us. By combining our Spring Sales/Marketing/Operations Training Workshops with the traditional Freedom Forum programming, our event will have more information and networking opportunities than ever before. Additionally, based on the positive feedback we got in 2021, we have expanded our agenda to include a series of breakout sessions so you can customize your schedule to focus on what is most important to you and your business.



And FF23 Freedom Forum will be fun! Each evening FF23 will feature a way to catch up with your fellow franchisees and connect with Freedom Boat Club staff in a memorable way! From Top Golf to a Game Day-themed Awards Dinner complete with a tailgate, there will be smiles for miles. And don't forget our favorite Hawaiian Shirt Wednesday, which will be back again in 2023!

This year our FF23 Freedom Forum theme is: Global. Local. Remarkable. It reflects the incredible global growth Freedom Boat Club has experienced, while recognizing your commitment to excellence that happens each and every day. We will shine a light on that commitment and pave the way for us to rise even higher in the coming year.

Thank you for joining us at FF23 Freedom Forum! I can't wait to see everyone and celebrate being Global – 370+ clubs strong with EMEA franchisees in attendance. Local – Highlighting best-in-class practices from you and your peers. Remarkable – Recognizing our strength today and sharing our vision for tomorrow. Let's get started!

A handwritten signature in black ink, appearing to read 'Louis Chemi'. The signature is fluid and cursive.

Louis Chemi  
Vice President  
Freedom Franchise



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## SUNDAY • FEBRUARY 19

**Registration** • 1-5pm • Tarpon Foyer  
**Check In** • 4-6pm • Westin Lobby

**AROUND THE WORLD  
WELCOME RECEPTION**  
6:00-8:00pm - Poolside



## MONDAY • FEBRUARY 20

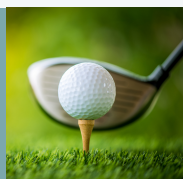
**BREAKFAST** • 7:30-9am • Tarpon

**Welcome & Platinum Partner Introductions**  
9-10am • Tarpon  
**Partner Expo** • 10am-12pm • Partner Pavilion  
*1:1 Franchise Mtgs • 10am-12pm • Admiral Suite*

**ANNUAL INSURANCE LUNCH & LEARN WITH BROWN  
& BROWN** • 12-1:30pm • Hospitality Tent

**Partner Expo** • 1-4pm • Partner Pavilion  
*1:1 Franchise Mtgs • 3:30-4:45pm • Admiral Suite*  
**Travel to Topgolf** • 5-6pm • Coach Load-in at Tarpon

**FREEDOM CUP  
PARTNER RECEPTION**  
6:00-9:00pm - Topgolf Ft Myers



## TUESDAY • FEBRUARY 21

**BREAKFAST** • 7:30-9am • Hospitality Tent

**Welcome & Logistics** • Louis Chemi • 9-9:10am • Tarpon  
**FBR Survey Review** • Louis Chemi • 9:10-9:25am • Tarpon  
**State of the Union • 2022 Highlights & 2023 Focus**  
Cecil Cohn • 9:25-10:20am • Tarpon

*BREAK* - 10:20-10:30am

**Marketing & Brand Building Fund Updates**  
Nick Gosselin • 10:30-11:25am • Tarpon

**FBC Global/EMEA** • Arturo Gutierrez  
11:25-11:55am • Tarpon

**Recap & Evening Logistics** • Louis Chemi  
11:55pm-12pm • Tarpon

**LUNCH** • 12-1:30pm • Hospitality Tent

**Freedom Food for Thought Lunch & Learn:  
Speed Dating Meet & Greet** • 12:30-1pm

*1:1 Franchise Mtgs • 1:30-4:30pm • Admiral Suite*

### SALES, MARKETING & OPS WORKSHOPS

*MARKETING: Tarpon • OPS: Pavilion • SALES: Grandville*

**PART ONE** • 1:30-2:15pm

- **MARKETING:** Europe Highlights: Reciprocals, Discovery & Meet the Team
- **OPS:** Validate Dockside Leadership Responsibilities
- **SALES:** Creating Monthly Calendars: Your Path to Sales Success

*BREAK* - 2:15-2:30pm

**PART TWO** • 2:30-3:15pm

- **MARKETING:** Building a Local Marketing Plan
- **OPS:** Seasonal Setups, It Snows 6 Months a Year -- Let's Go Boating!
- **SALES:** Membership Executive Lead Gen: Cultivating Opportunities Aligned with Marketing Strategies

*BREAK* - 3:15-3:30pm

**PART THREE** • 3:30-4:15pm

- **MARKETING:** Understanding Marketing & Advertising KPIs
- **OPS:** Bringing Our Brand Standards to Life
- **SALES:** Overcoming Objections to Get to the YES

*1:1 Connections w/ Session Speakers • 4:15-4:45pm*

**Change Champion Happy Hour Reception - by invitation only**  
5-6pm • Poolside

**TACO TUESDAY**  
6:00-8:00pm - Poolside



## WEDNESDAY • FEBRUARY 22

**BREAKFAST** • 7:30-9am • Hospitality Tent

**Welcome & Logistics • Louis Chemi** • 9-9:10am • Tarpon

**EXCELLENCE PROGRAM: 2023 Plan - Louis Chemi**  
9:10-9:40am • Tarpon

**DIGITAL: Res Sys v2 Update & Go Forward Plan**  
**Caroline Bugg** • 9:40-10:10am • Tarpon

*BREAK - 10:10-10:20am*

**MEMBER EXPERIENCE: Insights & Software Rollout**  
**Michelle Demeti** • 10:20-10:50am • Tarpon

**Raising the Bar on Remarkable Member Experiences**  
**Special Guest Speaker: Joey Coleman**  
10:50-11:50am • Tarpon

**Recap & Evening Logistics • Louis Chemi**  
11:50pm-12pm • Tarpon

**LUNCH** • 12-1:30pm • Hospitality Tent

**Freedom Food for Thought Lunch & Learn:**  
**Sustainability & All Blue Planet - Chioma Aladi**  
12:30-1pm

*1:1 Franchise Mtgs • 1:30-4:30pm • Admiral Suite*

### SALES, MARKETING & OPS WORKSHOPS

*MARKETING: Tarpon • OPS: Pavilion • SALES: Grandville*

**PART ONE** • 1:30-2:15pm

- MARKETING: Understanding Marketing & Advertising KPIs
- OPS: Hospitality & Service: The Keys to a Remarkable Member Experience
- SALES: Storytelling: A Useful Tool

*BREAK - 2:15-2:30pm*

**PART TWO** • 2:30-3:15pm

- MARKETING: Building Member Personas
- OPS: Validate Dockside Leadership Responsibilities
- SALES: Understanding the Prospect Decision-Making Process

*BREAK - 3:15-3:30pm*

**PART THREE** • 3:30-4:15pm

- MARKETING: Building Member Personas
- OPS: Fleetio: Bridging the Gap to Improve Communications & Data Throughout Operations
- SALES: Five Secrets of a Successful M.E.

*1:1 Connections w/ Session Speakers • 4:15-4:45pm*

### HAWAIIAN SHIRT WEDNESDAY FOOD TRUCK EXPERIENCE

6:00-8:00pm • Hospitality Tent

*Plus Optional Poker Game 8-10pm • Tarpon Foyer*



## THURSDAY • FEBRUARY 23

**BREAKFAST** • 7:30-9am • Hospitality Tent

**Welcome & Logistics • Louis Chemi** • 9-9:10am • Tarpon

**Boateka 2023 & Beyond • Kurt Wood**  
9:10-9:55am • Tarpon

**PR for Franchisees • Lee Gordon**  
9:55-10:25am • Tarpon

*BREAK - 10:25-10:35am*

**BRUNSWICK LEADERSHIP: Brenna Preisser**  
**& David Foulkes** • 10:35-11:35am • Tarpon

**Final Closing Q&A** • 11:35-11:50am • Tarpon

**Recap & Evening Logistics • Louis Chemi**  
11:50pm-12pm • Tarpon

**LUNCH** • 12-1:30pm • Hospitality Tent

**Freedom Food for Thought Lunch & Learn:**  
**Speed Dating Meet & Greet** • 12:30-1pm

*Freedom Council Meetings • 1:30-5:30pm • Details Below\**

### SALES, MARKETING & OPS WORKSHOPS

*MARKETING: Hospitality Tent • OPS: Pavilion • SALES: Rosen*

**PART ONE** • 1:30-2:15pm

- MARKETING: Building Community Connections Katie Falcone & Tracy Coughlin
- OPS: Maximizing Dock Roles and Requirements: How to Optimize Your Location
- SALES: How to Effectively Use SalesOptima Reports

*BREAK - 2:15-2:30pm*

**PART TWO** • 2:30-3:15pm

- MARKETING: Building Community Connections Katie Falcone & Tracy Coughlin
- OPS: Q&A Panel: Franchise Operations Experts - Moderated by John Combes
- SALES: Surgically Recovering Lost Leads

*BREAK - 3:15-3:30pm*

**PART THREE** • 3:30-4:15pm

- MARKETING: Building a Local Marketing Plan
- OPS: Future Freedom Forum Planning • Looking Forward & Feedback Session - Jenna Smith
- SALES: Sales Pitch Role Play

*1:1 Connections w/ Session Speakers • 4:15-4:45pm*

### FREEDOM GAME DAY TAILGATE RECEPTION & AWARDS DINNER

7:00-10:00pm • Tarpon

*7:00pm Reception & 7:45pm Awards Dinner*



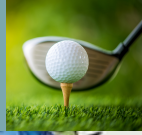
**\*Freedom Council Meetings • Thursday:** TECHNOLOGY 1:30pm-2:30pm & 3:30pm-4:15pm Hibiscus | FLEET 2:30pm-3:30pm Banyan  
MARKETING 3:30pm-4:15pm Cypress | EXCELLENCE 4:30pm-5:30pm Hibiscus | BUSINESS SERVICES 4:30pm-5:30pm Banyan



**HAWAIIAN SHIRT WEDNESDAY  
FOOD TRUCK EXPERIENCE**  
WED • 6-8pm - Hospitality Tent



**FREEDOM CUP  
PARTNER RECEPTION**  
MON • 5-6pm - Tarpon Coach Load-in



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GLOBAL • LOCAL  
REMARKABLE



**HOSPITALITY TENT • BREAKFAST • LUNCH**

**WELCOME BREAKFAST • GENERAL  
SESSIONS**

**FREEDOM GAME DAY TAILGATE  
RECEPTION & AWARDS DINNER**  
THU • 7-10pm • Tarpon



**REGISTRATION IN TARPON FOYER**

**PARTNER EXPO • PAVILION TENT**

**AROUND THE WORLD  
WELCOME RECEPTION**  
SUN • 6-8pm - Poolside



**TACO TUESDAY**  
TUE • 6-8pm - Poolside



**Freedom Fleet Sea  
Trials | G-Dock**  
SUN • 1pm-5pm  
MON • 10am-4pm





# The Westin Cape Coral Resort at Marina Village

**WESTIN**  
HOTELS & RESORTS



**THE WESTIN**  
CAPE CORAL  
RESORT  
AT MARINA VILLAGE

**DIRECTORY KEY**

- Lobby and Front Desk
- Business Center
- Event Lawn & Wedding Pavilion
- Westin WORKOUT Fitness Studio
- Main Pool
- Marker 92 Waterfront Bar & Bistro
- Nauti Mermaid Docksides Bar & Grill
- Calusa Conference Room (2nd floor)
- Banyan, Cypress, Hibiscus, and Palm Rooms (2nd Floor)
- Banquet Facilities:  
Rosen Ballroom (1st Floor)  
Grandville Ballroom (2nd Floor)  
The Rooftop (Roof Deck)
- Tarpon Point Ballroom
- Parking garage
- Silver King Shuttle
- Gather
- Eva by the Sea
- Gulf Coast Fudge Co.
- Tarpon Point Realty
- She Sells Shoes
- Esterra Spa & Salon (2nd Floor)
- Lorne's Gallery
- The Lookie
- Pinchers Crab Shack
- High Tide Eats (coming soon)
- Ship Store and Harbor Master
- Social Pavilion and Pools

5951 Silver King Boulevard, Cape Coral, Florida 33914  
T 239-541-5000 F 239-541-5010 | www.westincap coral.com





## Welcome

On behalf of the staff at The Westin Cape Coral Resort at Marina Village, we are delighted to welcome you to our resort. There are many options for you during your stay whether you prefer to remain active or just sit back and relax.

### RESORT FEE

The following amenities are provided during your stay with us and are included in the resort fee of \$35.00 per day:

- Daily Dolphin Sightseeing Tour at 9:30am and 11:30am (see front desk for availability)
- High Speed Internet Access
- Lawn Games
- Tennis Courts, Bocce Ball, Table Tennis, Fitness Center, Steam Room, and Sauna located at recreation center
- Access to two additional pools; One Laguna style pool and one Lap pool located at recreation center (8AM - Dusk)
- Bike Rentals (sign waiver at Front Desk)
- *Other Resort Amenities:*
  - Resort pool (8AM - 10PM)
  - Westin Workout, open 24/7
  - Business Center, available 24/7 in main lobby
  - Complimentary Garage Parking
- Wellness Together Activities
  - Complimentary Daily Yoga on the lawn 8am – 9am

For your convenience, please contact Service Express for assistance 24 hours a day, 7 days a week.

### OUR CHECK-OUT TIME IS NOON

Express check-out is available through the Marriott Bonvoy® app and on your guest room television. **Based on availability**, late check-outs are available for a nominal fee. Please contact Service Express on your day of departure to check availability.

## Join Marriott Bonvoy

Upgraded Wi-Fi, Mobile check-in, and our lowest member rates all the time. Scan code below to enroll. As part of the Marriott Bonvoy® program, the most rewarding frequent guest program, each stay at a participating hotel or resort helps you get back to a Westin hotel. Scan QR code to join and earn points toward free nights, flights and more. See Front Desk for more information.

MARRIOTT  
**BONVOY**



Visit [westincapecoral.com](http://westincapecoral.com) for reservations, directions and special offers to help you make the most of your trip.

T 239-541-5000 800-937-8461 F 239-541-5010 [westincapecoral.com](http://westincapecoral.com)

## Possibilities

Waterfront Dining and Shopping at  
The Promenade Shops at Marina Village

**NAUTI MERMAID**  
Dockside Bar & Grill  
*Happy Hour: 3PM - 6PM*

Sunday-Thursday: 11AM - 10PM  
Friday-Saturday: 11AM - 11PM

**MARKER 92**  
Waterfront Bar & Bistro

Sunday-Thursday: 7AM - 10PM  
Friday-Saturday: 7AM - 11PM

**In-Room Dining** available 7-days a week 7:00 AM - 10:00 PM

Scan to view menu



### ESTERRA SPA & SALON

Full Service Spa & Salon  
239-945-6689 or go to [EsterraSpa.com](http://EsterraSpa.com)

Monday-Friday: 9AM - 6PM  
Saturday: 9AM - 5PM

### THE PROMENADE SHOPS AT MARINA VILLAGE

Stroll the promenade and shop our fine boutiques and specialty stores. Contact the Front Desk for more information and hours of operation.

## Explore the Waters

### TARPON POINT MARINA

Tarpon Point Marina is located right outside your doorstep while staying at the resort and provides all the necessities needed to enjoy a day out on the water. From our 221 slip clean, deep-water marina and fuel docks, to kayak, boat rentals and sightseeing tours, you're sure to have a great day enjoying the Florida sunshine! **239-549-4900**

- Currently limited due to Hurricane Ian

**Access Code: 77732028**

#### Wi-Fi Instructions

Wi-Fi Network: Westin Guest

Go to Web Browser: [www.westin.com](http://www.westin.com)

Select: Standard Internet at \$9.95

Input: Last Name & Room Number

Select: # of Days

Click Purchase

*\*This cost is waived for resort fee paying guests*

For internet problems, please call 877-219-6810

# FREEDOM FRIENDLY REMINDERS

## REGISTRATION

- Register all guests in your party if you have not done so already.
- **Non-registered guests will not be able to register on-site.**

## SUGGESTED ATTIRE

### What to Bring – Packing Tips

Sometimes the most difficult thing about a trip is what to pack! Well, worry no more. Here is a day-by-day list of the key activities where you may want to bring something special. For all of the other meetings, we want you to be comfortable. Come as you are as you are among friends! However, be aware that Florida – while known as a sunny destination – has been experiencing some cooler evenings. Pack layers to manage the daily swings in temperature.

### Themed Events:

- **Around the World Welcome Reception** – Be comfortable. Come as you are!
- **Freedom Cup Partner Reception at Top Golf** – Be casual or come in your lucky golf shirt! Have some argyle socks or sweater to go with it? Wear that too!
- **Taco Tuesday** – Wear what you want! Have a sombrero? Feel free to bring it along!
- **Hawaiian Shirt Wednesday Food Truck** – Bring your best Hawaiian Shirt (obviously!)
- **Freedom Game Day Tailgate Reception & Awards Dinner** – This evening is all about sports! We will start with the American sports tradition of a tailgate party -- the gathering of friends in the parking lot using truck tailgates as food tables and seats -- and then move to the main event, GAME DAY! Wear a jersey or other uniform component of your favorite sport. Any and all jerseys are welcome – Soccer. Rugby. Football. Horse racing. Hockey. Yet feel free to get creative! Wimbledon tennis racket? Boston Marathon number? Diving goggles? We look forward to seeing all of it!

### Additional Items to Pack:

- Comfortable shoes, non-skid for those going on boats
- Sunscreen & hat for sun protection
- Jacket/windbreakers for sea trials and outside morning breakfast



# FREEDOM FRIENDLY REMINDERS

## FREEDOM FLEET

Come prepared with your fleet needs for the season, so you can mix and mingle with our Fleet Partners at the Partner Expo, and sea trial your boats of choice.

### Daily Sea Trial Hours

Sunday 1:00pm-5:00pm | Monday 10:00am-4:00pm

*\*Please note that while boats will be available to personally sea trial for the remainder of the week, the fleet will only be at the Westin Marina through end of day Thursday. Based on this please schedule any of your weekend boating needs as a reciprocal booking at a nearby club.*

### Freedom Fleet List

*\*Please note that this list is subject to change.*

- Mercury Truck
- Boston Whaler – 190 Montauk
- Sea Ray – SPO 210
- Sea Ray – SPO 230
- Lowe - SS230
- Harris – HCX23 Tritoon
- Princecraft - 23 Vectra
- Quicksilver – 675 Weekend
- Trophy - 23 Pilothouse
- Trophy - 25 Pilothouse
- Bayliner – VR6 OB
- Bayliner – DX2200
- Bayliner – Trophy CC22
- Bayliner – Trophy CC24
- Scout - 210 Dorado
- Sailfish 22
- Bennington
- Godfrey
- Crownline Finseeker
- Crownline E225
- Crownline E235
- Defiance – Maycraft 208
- Defiance - Maycraft 238CC
- Twin Vee - 22 Center Console
- Nautic Star 22
- Maverick - Pathfinder
- Veer
- Zodiac