PRIVATE RESEARCH DOSSIER

Joseph Denny

Prospect intelligence, sales psychology, and AI workflow strategy

PARTIALLY SUPPORTED

The fit is real—but the winning offer is an integration and decision layer, not another generic CRM or automation suite.

WORKING HYPOTHESIS Joe is an experienced, multi-segment Northeast Florida real-estate operator whose construction background makes him a strong fit for a connected AI operating system—if the pitch proves workflow value, works with existing tools, and preserves his control.

Prepared for	Skyrey — private meeting preparation
Research snapshot	August 10, 2026
Evidence standard	Verified facts separated from inference and unknowns

Research is based only on publicly available professional information. No private facts are asserted, and review-platform totals should be treated as directional rather than audited.

1. Executive readout

BOTTOM LINE Joe is a credible, established residential agent with meaningful luxury positioning, construction education, a public commercial affiliation, and a team-based operating model. He is a strong prospect for a focused AI workflow build. He is not a clean prospect for a vague 'AI does everything' pitch.

Question	Decision-grade answer
Is he a serious producer?	Yes. RealTrends reports $10.14M and 16.9 sides from 2024 data; current platform activity shows continued residential closings through 2026.
What is his real differentiator?	Local Northeast Florida knowledge plus a University of Florida Building Construction degree, used prominently in his branding.
Is he truly commercial?	Affiliated and publicly positioned for commercial work, but this review found little public transaction evidence proving a large commercial book.
Is he luxury?	Yes as positioning and credential: Coldwell Banker Global Luxury lists him as a Luxury Property Specialist. Do not infer a fully luxury-only business.
Does he need generic automation?	Probably not. CBV and the Coldwell Banker ecosystem already advertise CRM, nurture, marketing, analytics, and agent-support tools.
Best opportunity	A transparent operating layer connecting lead intake, property facts, team ownership, human-approved follow-up, and measurable next actions.

Recommended stance

- Respect what already works. Treat his brokerage stack as infrastructure to integrate with, not something to replace.
- Lead with one workflow bottleneck and one measurable result, not a catalog of AI features.
- Use his construction background as a sincere systems analogy, not as forced familiarity.
- Ask before assuming commercial volume, technology pain, team authority, or willingness to automate client communications.

Confidence map

Claim	Confidence	Why
Identity, brokerage, location	High	Official Coldwell Banker profile and first-party sites align.
Education and construction positioning	High	Repeated across official brand pages and LinkedIn education.
Historical residential production	High	RealTrends and multiple transaction platforms show substantial activity.
Current exact production total	Medium	Platforms use different periods, team-credit rules, and synchronization.
Commercial business depth	Low–medium	Official affiliation exists; public transaction evidence is thin.

Claim	Confidence	Why
Professional personality	Medium	Pattern inferred from bios and public reviews—not a private assessment.
Exact software stack and pain points	Low	Must be discovered directly.

2. Verified professional profile

Attribute	Verified or carefully qualified finding
Name / role	Joseph 'Joe' Denny, REALTOR®, Coldwell Banker Vanguard Realty, Ponte Vedra Beach / Northeast Florida.
Home market	Jacksonville native; public coverage and listings center on Jacksonville, Ponte Vedra, beaches, Nocatee, and surrounding Northeast Florida.
Education	Bachelor's degree in Building Construction, University of Florida. LinkedIn shows University of Florida education in 2007–2009 and an AGC student chapter association.
Construction background	Verified as education and brand positioning. No reliable public source reviewed here proved a prior construction employer or operating role.
Residential / commercial	Official bios state residential and commercial work; Coldwell Banker Commercial Vanguard Realty lists him as an affiliated professional.
Luxury	Coldwell Banker Global Luxury lists him as a Luxury Property Specialist; his own site states Global Luxury certification.
Awards	Official Coldwell Banker profile lists International Diamond Society and International Sterling Society; public page does not specify award years.
Team	Public 'Jeanie & Joe' site presents Joe Denny and Jeanie Leapley as a team with shared portfolio, search, valuation, market content, and lead capture.
License	Realtor.com lists Florida license #3457656. Confirm current status directly in the official DBPR portal before legal or contract reliance.

Self-described values and interests

His official Coldwell Banker bio emphasizes goals, negotiation, results, fun, family, and freedom; it lists hunting, fishing, and surfing as interests. These are useful only as light context. Do not manufacture a shared hobby or bring up family details as a sales tactic.

Current public listing signal

At the research snapshot, Coldwell Banker displayed active or coming-soon properties around $109,900, $630,000, $800,000, and $1.6 million. That breadth suggests comfort across entry-level condo, mid-market residential, and higher-end opportunities; it does not prove every segment is equally important to his business.

Source anchors

[Official Coldwell Banker agent profile]

[Joseph Denny official site]

[Coldwell Banker Global Luxury profile]

[Coldwell Banker Commercial profile]

[LinkedIn profile]

3. Business footprint and production evidence

INTERPRETATION RULE Platform totals are not interchangeable. Use each as a directional signal and keep its measurement window attached. Team-credit, syndication, and sync timing can materially change the count.

Historical benchmark

RealTrends' verified profile, based on 2024 sales data, reports approximately $10.14 million in volume, 16.9 transaction sides, and a $600,183 average home price. This is a strong historical credibility signal—not a current 2026 revenue statement.

Recent public transaction snapshots

Date	Price	Public-side note
Jun 1, 2026	$319,000	Recent activity shown on Realtor.com
May 8, 2026	$535,000	Buyer-side entry on Realtor.com
Mar 20, 2026	$985,000	Recent activity shown on Realtor.com
Mar 17, 2026	$840,000	Recent activity shown on Realtor.com
Feb 19, 2026	$1,150,000	Seven-figure residential activity
Feb 13, 2026	$485,000	Recent activity shown on Realtor.com
Feb 11, 2026	$650,000	Recent activity shown on Realtor.com
Nov 21, 2025	$1,060,000	Seven-figure residential activity

Source: Realtor.com public profile snapshot. These entries show activity, not necessarily personally retained commission or net income.

Cross-platform range

Platform	Snapshot	Correct use
Realtor.com	36 activities in 24 months; 3 active; 16 buyer / 17 seller entries	Supports balanced buy/sell activity and continued 2026 work.

Platform	Snapshot	Correct use
Zillow	10 sales in last 12 months; 38 total; $121K–$1.1M; $532K average	Directional range and review signal.
Homes.com	54 closed sales total	Additional lifetime/platform signal; do not merge with Zillow.

Commercial reality check

Commercial credentials and affiliation are real, but the public transaction footprint surfaced in this review is overwhelmingly residential. Treat commercial as a discovery path—not a proven primary revenue stream. The clean question is: ‘How much of your actual pipeline is commercial today, and does it run through a different process?’

4. Brand, reputation, and market positioning

How he presents himself

- Construction-aware advisor: his degree is positioned as an advantage for new construction, remodeling, and property evaluation.
- Negotiation and outcomes: official messaging stresses goals, deals, and results rather than lifestyle-only branding.
- Local Northeast Florida operator: Jacksonville roots and beach/Nocatee market knowledge appear repeatedly.
- Multi-segment capability: residential, commercial, and luxury are all named, while visible production is mostly residential.
- Team-enabled service: the Jeanie & Joe site creates a shared customer journey rather than a single-agent-only experience.

What public reviews consistently signal

Recurring theme	What it may indicate	Confidence
Responsive / accessible	Follow-up speed and availability are central to his service promise.	High
Professional / timely	He values process control and keeping transactions moving.	High
Patient / explanatory	He may respond to systems that improve client clarity without becoming impersonal.	Medium–high
Local knowledge	Property and neighborhood intelligence are part of the value he sells.	High
Relocation / military examples	There is a repeatable relocation use case in the review sample.	Medium

Experience.com showed a 5.0 rating across 20 Google-syndicated reviews at the snapshot; Zillow showed 5.0 across 7 reviews. Review samples are self-selecting and should not be treated as a complete reputation audit.

Content and digital funnel

The Jeanie & Joe site includes home search, valuation, portfolio, testimonials, market areas, a blog, and a 'My Search Portal.' A November 2025 article explaining Nocatee CDD fees is especially useful evidence: it shows a market for clear, repeatable local property education. Both the team site and Joe's individual site capture leads, and the team site includes explicit email, phone, and SMS consent language.

Network and visibility

Joe appeared on a June 18, 2025 Horse's Mouth episode with Major Harding and Coach Dave Campo. That is an older relationship/visibility signal, not a recent-event hook. It supports local networking but does not prove audience size or business impact.

5. Professional personality signals

BOUNDARY This is not a private psychological profile. It is a sales-relevant interpretation of consistent public professional behavior, language, and review themes.

Signal	Evidence	Likely sales implication	Confidence
Outcome-oriented	Goal and results language; negotiation emphasis	Lead with operational outcomes and acceptance criteria.	High
High-touch service	Responsive, accessible, patient review pattern	Show how automation protects his service standard—not how it replaces him.	Medium–high
Systems-aware	Building Construction education and process positioning	Use a connected-system analogy and show the flow end-to-end.	Medium
Control-conscious	Transaction oversight and negotiation identity	Require approval points, auditability, and transparent scoring.	Medium
Team collaborator	Public Jeanie & Joe team/funnel	Include ownership, handoffs, and shared visibility in discovery.	High
Tech-forward or tech-averse	Insufficient individual evidence	Do not assume. Ask what tools he keeps open every day.	Unknown

What he is likely to reward in a conversation

- Specificity: one bottleneck, one workflow, one defined result.
- Respect: acknowledge his existing service and brokerage resources.
- Proof: show data sources, timestamps, rationale, and human approval points.
- Control: let him determine what is automated, drafted, routed, or blocked.
- Practicality: explain the operating sequence before the model or technical stack.

What could create resistance

- A generic feature dump that sounds like tools he already has.
- Implying he fails at follow-up despite strong public service reviews.
- Overstating commercial or luxury production to flatter him.
- Black-box lead scoring or fully autonomous client communication.
- Artificial familiarity based on hobbies, family, or public biographical details.

6. Contradictions, hidden patterns, and red flags

The most important contradiction

GENERIC AUTOMATION MAY BE DUPLICATIVE Coldwell Banker Vanguard already advertises a Velocity Agent Success Program, marketing support, automated outreach, database nurture, closing support, and lead/referral nurture. The wider Coldwell Banker ecosystem also markets products such as Desk, MoxiWorks, CBx Buyer Locator, Prospect Square, social advertising, and market analytics. Joe may already have access to much of what a generic 'AI assistant' pitch promises.

Hidden opportunity: the seams between systems

The best wedge is not 'more tools.' It is the seam between lead source, client context, property facts, team ownership, follow-up approval, and next-action measurement. Existing systems often execute individual jobs; a custom operating layer can make the jobs share context and produce one accountable workflow.

Other evidence tensions

Tension	What it means for the pitch
Multi-segment branding vs. residential-heavy public sales	Ask where commercial and luxury actually enter the pipeline; do not build around them prematurely.
Strong reviews vs. 'lead leak' narrative	Frame the system as protecting a high standard during growth, not repairing poor service.
Many platform totals	Use ranges and source labels; never quote a synthesized 'exact' production number.
Construction education vs. unverified construction employment	Praise the education and property lens; do not invent years of field experience.
Automated lead funnel vs. unknown internal handoff	Discovery must trace what happens after form submission, not just the website experience.

Reputation / risk scan

No meaningful public negative-review pattern or complaint signal surfaced in this bounded professional search. That is not a clearance: the review sample is small and positive-platform biased, and no court, private-record, or invasive personal investigation was conducted. Such research would be disproportionate for ethical sales preparation.

7. Northeast Florida market context

realMLS reported the following for June 2026. These market conditions create a practical reason to improve speed, clarity, and differentiation, but they do not support fear-based claims that the market is collapsing.

Metric	June 2026	Interpretation
Closed sales	2,780	Healthy transaction activity.
Median price	$375,000	+4.8% year over year.
Median days on market	35	14.6% faster year over year.
Active inventory	10,448	+7.0% month over month; -12.6% year over year.
New listings	3,533	Down 7.3% year over year.

Strategic implications

- Fast, context-aware response still matters because inventory and client choices move.
- Clear local education—CDD/HOA, flood, permits, property age, inspection questions—can differentiate service better than generic content volume.
- realMLS already provides InfoSparks, FastStats, and Domus Analytics; generic market charts are not a unique offer.
- A better value proposition is converting trusted market and property facts into client-specific briefs and approved next actions.

Compliance guardrails

Any system should apply consistent objective criteria, avoid protected-class targeting, preserve human review, document data sources, honor consent and opt-out rules, and comply with brokerage, MLS, advertising, and fair-housing requirements. HUD's 2026 clarification emphasizes intent in steering analysis, but automation should still be designed conservatively. This dossier is not legal advice.

8. AI opportunity map: what is worth building

Workflow	Fit	Why it fits Joe	Control requirement
Lead intake + qualification	High	Broad price points, buyer/seller mix, relocation examples	Consent, editable criteria, no protected-class variables
Transparent lead prioritization	High	Team ownership and follow-up visibility	Show reason codes; no opaque score-only decisions
Property intelligence brief	Very high	Construction/property positioning and local education	Source/date every fact; flag uncertainty
Team handoff orchestration	High	Jeanie & Joe funnel and shared customer journey	Clear owner, status, SLA, escalation
Human-approved follow-up	High	Protects high-touch service without impersonation	Draft-first; approval and opt-out controls
Content generation	Medium	Useful for local explainers and listings	Facts locked; brand voice; compliance review
Commercial pipeline	Unproven	Affiliation exists; volume not verified	Build only after pipeline discovery
Generic CRM / market dashboard	Low	Likely duplicates brokerage/MLS tools	Integrate or omit

The recommended first workflow

1. A lead arrives from the Jeanie & Joe site, a referral, portal, or direct inquiry.
2. The system captures source, buy/sell intent, budget or financing state, timeline, location criteria, and communication consent.
3. It produces a transparent priority recommendation with reasons—never an unexplained ‘hot lead’ label.
4. It assigns an owner, due time, and escalation rule for Joe or Jeanie.
5. It creates a source-linked property brief covering relevant CDD/HOA, flood, permits, property age, construction/inspection questions, and known unknowns.
6. It drafts an email or text and the next task for human approval.
7. It converts approved facts into a client brief, seller update, listing narrative, or social post without re-researching the same property.
8. It measures response time, completion, handoff gaps, appointment progression, and outcomes by lead source.

DEMO RULE Show one complete residential or relocation workflow. Do not imply that MLS, CRM, SMS, email, permit, flood, or brokerage integrations are live until access, permissions, and acceptance tests have been completed.

9. Meeting strategy and conversation hooks

Best opening

SAY THIS Joe, your construction background gave me a better way to frame what I'm building. You already have brokerage tools, and your reviews suggest you know how to follow through. I'm not proposing another CRM. I'm proposing the operating layer between the lead, the property facts, the team handoff, and the next human action. Before I show you anything, where does that handoff still break today—even with the tools you already have?

Conversation hooks with a real reason behind them

Hook	Why it works
'You're working across a broad residential range—from entry condos to seven-figure homes. Which part of the process changes most as price point and client expectations rise?'	Shows preparation without pretending to know his private economics.
'I saw the team's Nocatee CDD explainer. How often do you rebuild that kind of local explanation manually for a client?'	Connects a visible content asset to repeatable property intelligence.
'CBV already gives you marketing and nurture tools. Which part is still disconnected—lead context, team ownership, property research, or next-action visibility?'	Acknowledges the incumbent stack and invites a specific gap.
'When a lead enters through the Jeanie & Joe site, how do you decide owner, priority, and follow-up sequence?'	Moves directly into the team operating model.

Discovery questions

1. Which systems do you and Jeanie actually keep open every day, and which are mandatory through CBV?
2. Where do your leads enter, and what happens in the first five minutes?
3. What still gets copied between CRM, email, phone, MLS, spreadsheets, and documents?
4. How do you decide team ownership, urgency, and next action?
5. Which property facts take the most time to research or explain—CDD/HOA, flood, permits, systems age, repair risk, inspection?
6. What can the system draft automatically, and what must always require your approval?
7. Does commercial work have enough volume and a different process to justify a separate pipeline?
8. What 90-day metric would make this investment obviously worthwhile?
9. Who approves integrations, data access, communications, and compliance—Joe, Jeanie, brokerage leadership, IT, or legal?

10. Objections, red lines, and credible responses

Likely objection	Credible response
'We already have tools.'	Good—that is the right starting point. I'm not trying to replace them. I want to identify and connect the handoffs they do not own.
'I already follow up.'	Your reviews support that. The point is to protect that standard when volume, price-point complexity, or team handoffs increase.
'ChatGPT can do this.'	It can generate text. The build connects approved facts, client context, permissions, ownership, next tasks, and measurement.
'That's too expensive.'	Then we should isolate the smallest workflow that can prove value and define acceptance criteria before expanding.
'I need to think about it.'	Absolutely. Which part needs the thinking—value, scope, timing, trust, or who needs to approve it?

What not to say

- 'I know your personality.'
- 'You did $10 million, so you can afford it.'
- 'I'll replace the CBV system.'
- 'AI handles everything.'
- 'I know you lose leads.'
- 'Your commercial business is huge.'
- 'I saw your family or hobbies.'
- Any guaranteed revenue, close-rate, time-savings, or compliance claim without a measured baseline.

Ethical finesse

The finesse is not manipulation. It is relevance: show that you understand his public business, acknowledge incumbent systems, ask precise questions, and connect the proposal to a pain he personally confirms. If the pain is not confirmed, do not force the offer.

11. Package strategy and closing sequence

Package	Investment	Deposit	When it fits
AI Foundation	$7,000	$3,500	One high-value workflow with defined acceptance criteria.

Package	Investment	Deposit	When it fits
Growth OS	$9,000	$4,500	Two or more connected workflows and team use; recommended anchor if discovery confirms the need.
AI Operating System	$12,000	$6,000	Confirmed cross-line scope, property intelligence, team orchestration, and integration complexity.

The remaining balance is due at initial launch. Final scope must identify systems, data access, permissions, acceptance criteria, exclusions, and any third-party fees.

How to position the tiers

- Anchor Growth OS at $9,000 only after confirming at least two valuable connected workflows and team usage.
- Use AI Foundation at $7,000 when one workflow can prove value cleanly and safely.
- Reserve the $12,000 AI Operating System for confirmed—not presumed—residential/commercial/luxury scope, property intelligence, and integration work.
- Never justify price by saying his historical volume proves he can pay. Tie price to scope, complexity, risk, baseline, and measurable value.

Closing sequence

1. Confirm the problem in Joe’s words and its operational consequence.
2. Select one priority workflow and identify the people and systems it touches.
3. Agree on the 90-day baseline and success measure.
4. Confirm human approval points, data permissions, and brokerage stakeholders.
5. Recommend the smallest package that can deliver the agreed outcome.
6. Ask for the deposit only after scope, exclusions, launch definition, and acceptance criteria are written.
7. Schedule the technical discovery / workflow-mapping session before ending the meeting.

Follow-up plan

Timing	Action
Same day	Send a concise recap using his words: pain, workflow, outcome, open questions, and next meeting.
Within 24 hours	Send a one-page proposed workflow map with assumptions clearly labeled.
Within 48 hours	Confirm stakeholder, systems, data-access, consent, and compliance questions.

Timing	Action
Proposal	Define scope, acceptance criteria, deposit, launch milestone, remainder due, exclusions, and third-party costs.
No decision	Follow up with one relevant insight or simplified pilot—not repeated pressure.

12. Research audit, sources, and limitations

Method

This dossier used a hypothesis-testing approach: establish the public professional identity, test production and positioning, search for contradictions, inspect existing technology, and separate facts from inference. More than one-third of the search effort focused on disconfirming paths such as incumbent automation, commercial-volume evidence, negative-review patterns, prior construction employment, and platform-data conflicts.

Primary and authoritative sources

Coldwell Banker — official agent profile

Joseph Denny — official website

Jeanie & Joe — official team site

Jeanie & Joe — blog

Coldwell Banker Global Luxury

Coldwell Banker Commercial

CBV — Join Vanguard / tools

CBV Total Agent

realMLS — June 2026 market data

HUD — 2026 fair-housing clarification

Florida DBPR — Verify a License

Secondary platform sources

RealTrends — Joseph Denny profile

Realtor.com — public agent profile

Zillow — public profile

Homes.com — public profile

Experience.com — review profile

Horse's Mouth TV — June 18, 2025 episode

Limitations

- No direct transcript of the networking event recording or the Horse's Mouth episode was available for this review.
- Current Florida license status was not directly exposed by the indexed result; confirm in the official DBPR portal before formal reliance.
- No private CRM, inbox, brokerage dashboard, conversion data, commission data, contract terms, or API inventory was accessed.
- Commercial affiliation is verified; commercial production depth is not.
- Public review samples are incomplete, self-selecting, and not a substitute for direct references.
- Public platform counts change and may conflict due to attribution and sync rules.
- No invasive personal, family, financial, court-record, or private-background investigation was conducted.

FINAL VERDICT Proceed with a discovery-led pitch. The most credible wedge is a transparent property-intelligence and team-orchestration workflow that integrates with Joe's existing tools, protects his high-touch service, and proves value through agreed operating metrics.