



Definition of Requirements &Team Selection

Situation Analysis & Strategic Development

Market Survey

Alternative Site Qualification & Selection

Negotiations

Follow-up Services & Ongoing Maintenance

- Scrutinize requirement.
- Ascertain likely components of optimal solution.
- Define specialized expertise needed.
- · Assemble team.

Situational Analysis

 Refine understanding of client's business, spatial, and financial requirements.

Strategy Development

- Evaluate viability of Renewal.
- Identify alternative location scenarios.
- Create geographic parameters for relocation scenarios.
- Compile employee information and develop workforce profile.

- Conduct comprehensive market survey.
- Analyze prevailing market conditions and forecasts.
- Match potential facilities with client's requirements.

Tour / Request for Proposal

- Preview options.
- Conduct tours of the most qualified options.
- Prepare and issue Request for Proposal (RFP).

Proposal Analysis

- Evaluate proposals.
- Present counterproposals.
- Perform financial analysis of each option.
- Perform in-depth financial analyses of short list.

- Formulate negotiation strategies.
- Make final recommendation.
- Present recommendation to management.
- Draft letter of intent (LOI).
- Provide client's attorney with the final, negotiated business terms.
- Review lease or purchase terms and conditions with client and client's attorney.
- Negotiate work letter.
- Negotiate final lease agreement or purchase agreement.

- Create project schedule.
- Establish detailed layout and furniture plan
- Manage procurement of materials and services.
- Oversee construction process and reporting.
- Supervise furniture and voice/data cabling installation.
- Execute organized move/staging process.
- Monitor critical dates and notify client.

Deliverables

Existing lease abstract and project schedule.

Market survey book of alternative locations, market analyses, summary of alternatives, location map of alternatives, and building fact sheet for alternatives.

Tour book, short list of alternatives RFP, qualitative and financial analyses, counterproposals, and negotiation tracking matrix.

Counterproposals, negotiation tracking matrix, LOI, detailed comments to lease document or purchase agreement. Project schedule and lease abstract.