

Pitch and Win More Leasing Exclusives

A checklist for agency brokerage teams

Owner: _____ Property _____

Pitch Team: _____

1. What is the assignment we are pitching? _____
2. What is the revenue opportunity for this exclusive? _____
3. What presentation level should we put into this opportunity? A AA AAA _____
4. Who is going to attend from the owner's side? _____
5. What do we know about them? _____
6. Why are they looking to hire a brokerage firm? _____
 - a. Is it staffing focus? Yes _____
 - b. Is it a tenant canvassing assignment? Yes _____
 - c. Is it a broker community assignment? Yes _____
 - d. Other Yes _____
7. The meeting Formal vs informal _____ How much time? _____ The date _____
8. What other brokerage firms are competing for this assignment? _____
9. How are we going to demonstrate our knowledge of the property and compared to its competition? (See [SWOT](#) and [USP](#)) _____
10. Using CoStar reports, how are we going to demonstrate our understanding of the market?
Is it a tenant market or landlord market? What have the absorption rates been? How many competitors are there for each size availability? Which CoStar market reports are we going to use and what story does it tell?
 - a. Availability and rent Yes _____
 - b. Absorption Yes _____
 - c. Time to lease Yes _____
 - d. Block space analysis Yes _____
11. Which tools will we use to inform, motivate, and remind the brokerage community of the property's present marketing story and availability?
 - a. The Leasing Sign Yes _____
 - b. Broker Email Blast Yes _____
 - c. CoStar & CRE MLS Yes _____
 - d. Property Website Yes _____
 - e. Property Flyer/Brochure Yes _____

- f. Broker Open House Yes _____
- g. Marketing Center Yes _____
- h. Broker Incentives Yes _____

12. How can we maximize the number of tenant broker tours we get? _____
13. How can we improve the professionalism of the property's tour? How do we demonstrate that we know how to design & orchestrate an impactful tour? _____
14. How large is the 'targeted' brokerage community for this opportunity? _____
- a. In-house broker list of _____ email addresses.
 - b. Black's Directory broker list of 1800+ email addresses.
15. How large, using the concentric circle method, are the 'targeted prospective tenants' groups for this opportunity?
- a. _____ b. _____ c. _____
16. How are we going to market to these 'targeted prospective tenants' groups?
- _____
17. Which services does the owner need? How are we going to demonstrate these skills?
- a. Marketing services Yes _____
 - b. Negotiations skill Yes _____
 - c. Lease Analysis & comparison Yes _____
 - d. Salesmanship on the tour Yes _____
 - e. Corporate Reporting Yes _____
18. Who on the team is responsible for the following:
- a. Handles inquires from brokers & users Yes _____
 - b. Sets up and conducts the property tours Yes _____
 - c. Coordinates the marketing efforts Yes _____
 - d. Canvass the business community Yes _____
 - e. Canvass the brokerages community Yes _____
 - f. Prepares the Monthly Marketing Report Yes _____
19. What information will we provide in our Monthly Marketing Meeting?
- a. Leasing Activity Form information
 - i. List of inquires received Yes _____
 - ii. List of Broker Survey presentations Yes _____
 - iii. List of tours by sf, new tours, retours. Yes _____
 - iv. List of new RFP/or Letters of Intent Yes _____
 - v. List of 'Reasons Why' the next step was not taken by the prospective tenant with recommended actions. Yes _____

b. CoStar's Reports

- i. Comprehensive Change Report Yes _____
- ii. Leasing Activity Report Yes _____
- iii. Block Size Report Yes _____
- iv. Map Report with 1-line report of long and short list competitors/Use Mailer Format Yes _____
- v. Combination Charts: (1) Absorption & Deliveries, (2) Vacancy & Rental Rate, (3) Occupancy & Rental Rate Yes _____

20. Listing Agreement

- a. Fees/Commissions Yes _____
- b. Term Yes _____
- c. Marketing Budget Yes _____

Suggested Tabs for Your Pitch Book

1. The Agenda
2. Our Philosophy
3. The Team
4. The Asset
5. The Market and Trend
6. The Competition and Your Unique Selling Position
7. The Prospects-The Business Community
8. The Sales Force-The Brokerage Community
9. Our Leasing Agreement and Time Schedule

Final Note

Every brokerage firm operate differently and each pitch and team, will have unique challenges. The successful winning pitch is just the beginning. The second step is the execution of your marketing plan & promises. And the third stage is keeping the owner happy until the property is leased or sold. Your pitch is the explanation of the marketing plan, and how you intend to keep the owner informed (aka happy).

Best of luck,

Jim Black

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PS: If you would like me to work with your agency teams, and strengthen their pitch, so you win more leasing exclusives, contact me. I charge \$100 per hour, with a 5 hour minimum.