



Certified Commercial Investment Member – New Mexico

Deal Making Session Guidelines

May 9, 2012

Goals:

- get deals done
- assist presenter in presentation
- improve presentations
- facilitate flow of presentation; focus on leading listing to a buyer

Deadline for property submittals is 1:00 p.m. the Wednesday prior to the session.

Chapter Marketing Manager (CMM)

- accepts submittals up until deadline
- maintains the list of CCIM designee coaches - list to be alphabetized
- assigns Deal Making Session presenters to coach in sequential order along list
- emails coach and presenter "team" by 5:00 p.m. of deadline day
- accepts corrected/updated PowerPoint file for Deal Making Session until noon Monday prior to the Deal Making Session

Presenter's Role & Requirements

- sends flyer and PowerPoint to CMM by deadline (no PowerPoint = no reserved spot)
- **it is the presenter's responsibility to contact the coach** - ask for constructive feedback
- prepares to answer questions on property, financial operations, area, owner needs, what the owner can add, and how you arrived at price
- reflects advice provided by coach in updated presentation
- acknowledges that coach feedback may lead presenter to conclusion of withdrawing from presentation

Coach's Role

- available for consultation
- alerts CMM if coach is not available for next Deal Making Session
- provides constructive feedback
- coaches presentations, if requested
- showcases presenter, if assisting with presentation
- leads presenter and property to deal and helpful feedback
- encourages one trial run/dress rehearsal (telephonically is okay)

Coach Questions

- type of deal (core, value add, investment with income stream, owner/user)
- location—where is your listing
- context—how does the listing relate to the area? (or what is going on in the area?)
- physical description—size of building, size of land, zoning, unique features
- best part of listing
- least attractive part of listing
- client needs (cash is not the only answer, timing, where they will use the funds from sale, etc.)
- what can the client add (financing, new tenant, political stroke, etc.)
- engages audience early (show of hands who has a buyer for an income stream, thumbs up or down on area, who has someone they will show this too? If not, why? (focus questions on brokers who indicated a previous interest))

Note: In the event presenter feels that assigned coach may not effectively assist the presenter, presenter may respectfully request a new coach via email to the CMM with no fallout. CMM will assign the next available coach. A coach may also request that presenter be assigned to another coach.