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.