



BELLA TERRA  
PARTNERS

---

THE STRATEGIC FACILITY SELECTION PROCESS

---





BELLA TERRA  
PARTNERS

## THE PROCESS

The Strategic Facility Selection Process provides businesses with the tools and information to obtain maximum value from their office leases and facilities. This process will enable a company to maximize the return on their office space investment while also maximizing flexibility, creativity and business growth.

---

**step 01** Assess & Define Requirements

---

**step 02** Establish Facility Vision

---

**step 03** Survey Market

---

**step 04** Identify Obstacles

---

**step 05** Develop Strategies

---

**step 06** Design Facility Plan

---

**step 07** Prepare & Issue Request  
for Proposal

---

**step 08** Technical Property Review  
& Analysis of Proposals

---

**step 09** Prioritize Best Proposals  
& Preliminary Negotiations

---

**step 10** Select Project With Alternatives

---

**step 11** Negotiate Facility Transaction

---

**step 12** Follow-up Service

---



# DEFINED

- 01 **Assess & Define Requirements:** Ascertain a complete picture of present and future office space needs.
- 02 **Establish Facility Vision:** Develop a vision of the ideal facility requirements that are applicable for both current and future needs.
- 03 **Survey Market:** Evaluate available properties and projects based on their ability to meet specific needs and achieve established vision.
- 04 **Identify Obstacles:** Identify lease and facilities issues that could prevent vision achievement.
- 05 **Develop Strategies:** Explore and select strategies that will overcome the identified obstacles.
- 06 **Design Facility Plan:** Articulate, clarify and prioritize all actions needed to realize established vision.
- 07 **Prepare & Issue Request for Proposal:** Solicit building proposals from landlords/owners and developers for consideration. Each proposal is abstracted, financially analyzed and presented on an "apples-to-apples" basis.
- 08 **Technical Property Review & Analysis of Proposals:** Rank the most qualified properties based on studies of location, space efficiencies and workflow, base building systems and financial considerations. Preparation of a comprehensive financial analysis of proposed transaction alternatives, including relocation costs, leasehold improvements, technical consulting, installation fees, telecommunications costs, etc.
- 09 **Prioritize Best Proposals & Preliminary Negotiations:** Seek to improve project proposals deemed most attractive. Systematically assess each alternative based on negotiation results -- setting the stage for final project selection.
- 10 **Select Project With Alternatives:** Present final conclusions and recommendations on the best project with a backup alternative. Delivery of a letter of intent to the selected project with detailed final terms and conditions.
- 11 **Negotiate Facility Transaction:** Work with your attorneys to negotiate a lease/purchase document that satisfies specific operational, financial and contractual requirements.
- 12 **Follow-up Service:** To ensure the established vision is fully realized, we monitor and coordinate the construction phase. We also assume responsibility for the disposition of any existing facilities including unexpired lease space and/or owned properties. A final report is provided in an easily interpreted form and yearly escalations are reviewed to ensure contract compliance throughout the lease term. Our team will be available at any time as a liaison with the landlord/owner or developer on any concerns regarding all aspects of the transaction.

# WHY WE CREATED THE PROCESS

---

Many successful businesses have achieved substantial progress but are often unintentionally confined by the limitations of their current office space.

Quite often, businesses are not aware of the benefits and results of an enhanced office environment. Limitations can arise from being locked into a lease that is restricting business growth or by thinking a move or modification of current space will not be practical or cost effective. Additionally, a lack of specific market knowledge can prevent companies from achieving the best advantage of available facility opportunities.

For precisely these reasons we have created The Strategic Facility Selection Process. Our team has utilized twenty years of business experience to develop a process that helps our clients understand the positives and negatives of their current situation. With this insight established, we are able to create a powerful vision for their future. Subsequently, we work with our clients to identify obstacles, develop strategies to overcome them and then review all of the tools and information available to achieve their vision.

Whether you relocate to a new facility or make the decision to modify your existing space, by completing this process you will have been empowered to make the best business decisions with a minimum amount of disruption. You will be confident that you have secured the best possible facility transaction; therefore, maximizing your facility investment, flexibility, creativity and business growth.

## YOUR BENEFIT

---

COMPLETE ASSESSMENT of the overall efficiency of your present office space

FULL ANALYSIS of the total cost of relocating or modifying your existing office

Confidence that ALL YOUR OPTIONS have been identified, analyzed and evaluated

Assurance that your office space will meet all of your requirements as EFFICIENTLY as possible

STREAMLINED PROCESS of current space modification or relocation

Confidence that you have made the BEST POSSIBLE BUSINESS DECISION regarding the terms of your lease, build-to-suit or purchase transaction

Attract and retain the best employees while MAXIMIZING PRODUCTIVITY

## IN OUR EXPERIENCE

---

*“Now that we are in the construction phase, you two are still involved in the project and attend the weekly meetings when most brokers would not for a project our size. This is most appreciated. You were most helpful, once again, in securing a positive position for us in the payment process of invoices to the general contractor...you have been wonderful to work with and have made my experience through this process a positive one. Thank you again.”*

Illinois Chamber of Commerce

*“Thank you for the outstanding job you did in assisting Schneider with the acquisition of 20,998 sq. ft. new office space in downtown Chicago. You helped us achieve our primary goal of increasing our space while keeping our costs manageable and demonstrated professionalism, attention to detail, experience, leadership, and commitment to the highest level of customer service I’ve ever seen in the more than 200 lease transactions I’ve completed in the past four years across the USA and Canada.”*

Schneider National, Inc., Trucking and Logistics