

# Corporate Client Interview Checklist for Leasing



**Corporate Client  
Office Leasing Course**

**Organisational  
Checklist**

<http://commercial-realestate-training.com>

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# Defining Organizational Needs of Corporate Clients by John Highman



This is a list of questions and investigations that can be applied to services offered to a corporate commercial real estate client.

Chart Resource designed by John Highman, Commercial Real Estate Online

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**How to use this resource:** Choose the topic from the Contents page and go to that page to ask the questions and capture the answers in each case. The form is to be used in interviews with corporate clients in leasing new premises. You can add to the list if you wish.

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# 1 Leases

- 1.1 What current leases exist or will be impacted?
- 1.2 Are there any special lease conditions required?
- 1.3 How will documentation be reviewed, approved, and signed?
- 1.4 What lease terms and conditions do they have?



## 2 Property

2.1 Where is their property now and how will that change?

2.2 Preferred locations

2.3 Preferred configurations

2.4 Risks to site and occupancy

2.5 Risks to buildings or improvements

2.6 Environmental risks

2.7 Proximity to end users or clients

2.8 Proximity to resources or transport

2.9 Entry and access

2.10 Security

2.11 Services and amenities

## 3 Land

- 3.1 Is land occupancy and or size of land of concern in the property change?
- 3.2 Boundary assessment
- 3.3 Levels and soil stability
- 3.4 Services and amenities

## 4 Occupancy Costs

### 4.1 What are the occupancy costs now and how will that change?

4.1.1 Expectations

4.1.2 Budgets

### 4.2 Energy

4.2.1 Special requirements

### 4.3 Water

4.3.1 Special requirements

### 4.4 Drainage

4.4.1 Special requirements

### 4.5 Environmental

4.5.1 Rules and regulations

4.5.2 Approval requirements

### 4.6 Rent budgets

4.6.1 Rental types

4.6.2 Rental escalations

### 4.7 Outgoings budgets

4.7.1 Budgets

## 5 Logistics

5.1 Are there any logistics issues that must be satisfied in the property change?

## 6 Emerging markets

### 6.1 Will the client need to tap into other markets or emerging markets?

## 7 Services and Amenities

### 7.1 Create a short list of these requirements

### 7.2 Security

#### 7.2.1 A/Hs

#### 7.2.2 Office hours

### 7.3 Air conditioning capability

## 8 Location/Proximity

8.1 What is their current location and how will that change?

8.2 Understand location alternatives and timing

## 9 Who is or are the Decision Makers?

- 9.1 Investigate the people and know their priorities or end targets
- 9.2 What is the link between the key people?
- 9.3 What do they know about the property type and decisions?
- 9.4 Have they looked at other properties?



## 10 Size and Improvements

10.1 What size of property and or premises?

10.2 What size of premises internally?

10.2.1 Floor plate sizes?

10.3 What interaction rules between divisions or departments?

10.4 What fitout requirements?

10.4.1 Offices, Open plan, Special areas

10.4.2 Fitout design

10.5 How much land do they need and how do they use it?

10.6 Warehouse, Showroom, Office, Special Areas - sizes

## 11 People

11.1 Are there third party people involved? i.e. landlords, or other agents

11.2 Do you need to interact with those people?

11.3 What decision facility do the other people have?

11.4 Who are the interested parties?

11.5 Who are the people in the legal team

11.6 Who are the people in the financial team?

## 12SWOT

12.1 Undertake a SWOT of property operations and site preferences

12.2 Understand the weaknesses and threats so you can avoid them

12.3 Understand the strengths and opportunities so you can boost them

## 13 Timing

13.1 What is the ideal timing?

13.2 What time allowance to find a new location?

13.3 Time to move between old and new new premises?

## 14Transport

14.1 What are the special transport pressures or required outcomes?

14.2 Staff transport?

14.3 Goods, Services, Deliveries, Raw Materials?

14.4 Client access?

14.5 Car parking needs?

## 15 Communications

15.1 Detail all communications requirements

15.2 Telephone

15.3 Data

15.4 Inter-building

15.5 Internet speeds and access

## 16 Location

16.1 What is the best location?

16.1.1 Short list of priority locations

16.2 Why have they made that choice?

16.3 Are there risks associated with the site or site choices?

## 17 Risk Management

17.1 Are there risk factors to take into account?

17.2 Environmental

17.3 Security

17.4 Tenancy use

17.5 Property use



## 18 Product or Service

18.1 Can the requirements on selected property for them change?

## 19 Staff

19.1 How do staff interact with and use property?

19.2 What are the staff numbers?

19.3 What about car parking?

## 20 Clients

20.1 What are the client access concerns or targets?

20.2 What are the client requirements on site?

20.3 How will client's access and use the property?

## **NOTES:**

**What are your action ideas on this?**

**1.**

**2.**

**3.**

**4.**

**5.**

**6.**

**7.**

**8.**

**9.**

**10.**



## IMPORTANT INFORMATION

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