REILLY
SALES CONSULTING

# CRE SALES KIT.

PSYCHOLOGY-BACKED SALES PLAYBOOKS FOR COMMERCIAL REAL ESTATE PROS



## CRE SALES KIT

The **CRE Sales Kit** is designed for commercial real estate professionals seeking to enhance their deal flow. This toolkit enables you to:

- Align stakeholders effectively
- Streamline deal processes
- Improve pitch strategies

Stay ahead in the competitive CRE market with these strategic insights.

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## **CRE DEAL TRACKER & RENEWAL PIPELINE TEMPLATE**

## TRACK DEAL VELOCITY, STAKEHOLDER STATUS, AND NEGOTIATION PHASES WITH CLARITY

Audience: CRE brokers, acquisition leads, leasing managers, project directors

#### What It's For:

From first showing to signed lease, and years later to renewal, CRE deals are **long-cycle and relationship-heavy**. This template keeps your team aligned on every stage of every deal, with zero guesswork or forgotten follow-ups.

### **CRE DEAL PIPELINE TRACKER STRUCTURE**

## STAGE DEFINITIONS (PIPELINE COLUMN HEADINGS)

Stage	Description	
Discovery	Identified potential fit, early inquiry	
Tour Scheduled	Site visit set or completed	
Proposal Shared	Terms or proposal sent	
LOI Negotiation	Active redlines / legal review	
Under Contract	Final docs in motion	
Closed / Signed	Deal executed	
Lost / Inactive	No movement, withdrawn, or replaced	

**Solution** Use dropdowns to keep data clean

## **TAB 1: ACTIVE DEAL TRACKER**

Field	Example	
Deal Name	"2201 Industrial – Flex Lease"	
Prospect / Tenant	DynaBuild Group	
Deal Type	Lease / Sale / Renewal / Expansion	
Broker	Alex M.	
Stage	LOI Negotiation	
Target Close Date	Based on client's stated timeline	
Close Probability	40%	
Sq Ft	82,000	
Est. Value	\$4.2M	
Timeline	Target close: May 30	
Stakeholders	CFO (Alpha Capital), GC (SitePoint)	
Next Action	What's happening and when	
Deal Health	Green / Yellow / Red	

**\*\*** Use conditional formatting to flag stalled deals (>30 days no update). Filter by deal type, submarket, or urgency

## **TAB 2: DEAL STAGE DEFINITIONS**

Stage	Description	
New Lead	Inbound, referral, or sourced	
Active Discovery	Site tour, conversation underway	
Proposal Sent	Draft LOI or formal terms presented	
Negotiation	Legal or pricing discussion live	
Verbal Yes	Awaiting signature or final internal signoff	
Signed / Closed	Fully executed	
On Hold / Lost	Paused, cold, or turned down	

Tip: Add "Deal Heat" flag ( / / ) based on urgency or sentiment

## **TAB 3: RENEWAL & EXPANSION PIPELINE**

Tenant	Lease Start	Lease End	Early Renewal Signal?	Expansion Fit?	Next Action
Global BioTech	Apr 2022	Mar 2025	NPS score high; usage rising	Yes, looking at next floor	Book midterm strategy session

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#### WEEKLY REVIEW PROMPTS

- What moved forward this week?
- What's stuck, and why?
- Who's waiting on us vs. who are we waiting on?
- Any deals ready to bring to leadership or investment committee?

## **OPTIONAL TABS / EXTENSIONS**

- Comps Log: Attach active comps per deal
- Stakeholder Tracker: See section below
- Post-Close Notes: Retention and upsell triggers
- Marketing Needs: Collateral requests tied to pipeline deals

## ro Tip:

A deal that's "in the works" for 90 days with no timeline, no champion, and no urgency... isn't a deal. Use this tracker to call the difference between *possibilities* and *pipeline*.

## ro Tip:

CRE sales is a **persistence game masked as a people business.** This tracker ensures nothing slips through the cracks, and helps you turn 12-month cycles into 9-month wins.

## **CRE SALES FORECASTING SHEET**

## PROJECT REVENUE, TRACK DEAL TIMING, AND PLAN FOR CONVERSION WITH DATA-DRIVEN CONFIDENCE

Audience: CRE brokers, managing partners, sales managers, development heads

#### What It's For:

CRE deals are long, lumpy, and full of uncertainty. This forecasting sheet helps your team model revenue with **realistic probabilities**, visualize timing, and manage pipeline risk, so you can plan, hire, and prioritize with confidence.

### **CRE SALES FORECASTING SHEET CORE COMPONENTS**

#### FORECAST GRID STRUCTURE

Deal Name	Client	Sq Ft	Est. Value	Stage	Close Probability	Est. Close Date	Forecast Value
"Riverview Build- to-Suit"	Magna Co.	96,000	\$8.4M	LOI	60%	Aug 15	\$5.04M
"Legacy Tower Lease"	Carter Partners	22,000	\$1.9M	Tour Complet e	30%	TBD	\$570K

**X** Use dropdowns for stage and probability

Forecast Value = Deal Value × Close Probability

#### STAGE-RASED PROBABILITY GLIDE

Stage	Probability
Discovery / Inquiry	10%
Tour Scheduled / Completed	30%
Proposal Sent / Negotiation	50%
LOI Signed	70%

Under Contract	90%
Closed	100%

## **Adjust these based on your firm's actual close rates**

## **VELOCITY METRICS (AUTO-CALCULATED)**

Metric	Formula	Example
Avg. Deal Size	Total Value ÷ # Deals	\$2.2M
Avg. Close Time	Days from Stage 1 to Close	94 days
Forecast Coverage	Forecast Value ÷ Goal	74% to monthly target



## **Solution**

## **QUARTERLY FORECAST SNAPSHOT (ROLLUP SECTION)**

- Total forecasted revenue
- Weighted pipeline
- Deals by stage
- "At-risk" deals (pushed >2x or no movement in 30+ days)
- Total sq. ft. under discussion
- Confidence rating by rep or region

### Pro Tip:

CRE isn't SaaS. You won't have perfect linearity. But you can control visibility, velocity, and focus. A great forecast doesn't just inform leadership, it keeps reps laser-focused on what's real and what's next.

## CRE PITCH DECK OUTLINE (DEVELOPER & INVESTOR-FOCUSED)

## PRESENT YOUR DEAL WITH CLARITY, CONFIDENCE, AND INVESTOR-READY LOGIC

Audience: CRE brokers, developers, investment sales professionals, leasing teams

#### What It's For:

High-stakes real estate deals require more than a glossy brochure. This pitch deck outline helps CRE professionals create **narratives that de-risk the deal** and speak the language of capital partners, tenants, and stakeholders alike.

## **CRE PITCH DECK OUTLINE SLIDE-BY-SLIDE STRUCTURE**

## **SLIDE 1: HEADLINE HOOK**

Title: The Opportunity in One Line

"Mixed-use flagship repositioning in the most under-supplied corridor in Toronto."

Include: logo, image render or photo, location reference

## **SLIDE 2: THE WHY NOW**

Title: Market Timing Advantage

- What's driving urgency? (supply/demand, zoning, anchor interest)
- Relevant comps or absorption metrics
- Quote or stat to create momentum
- Shows you're not just selling a property, you're selling timing

## **SLIDE 3: THE PROJECT AT A GLANCE**

Title: Specs That Matter

- Total SF (breakdown: retail, office, residential)
- Lot size, zoning type, permitted FAR
- Target delivery timeline
- Investment overview / cap structure
- **\*** Clean table format or visual layout

## **SLIDE 4: LOCATION ADVANTAGE**

Title: Why This Address Wins

- Map with proximity highlights (transit, anchors, demographics)
- High-level demographic or foot traffic data
- Local development trend line or future projects nearby

## **SLIDE 5: THE TENANT/USE CASE STORY**

Title: Who This Is Built For

- Anchor tenant profile or LOI status
- Target tenant categories (e.g. medtech, QSR, coworking, luxury)
- Customization options (Tls, whitebox, sustainability credentials)

## **SLIDE 6: FINANCIAL OVERVIEW**

Title: Return, Risk & Path to Capital Events

- IRR or stabilized yield
- Lease-up timeline assumptions
- Exit or hold strategy
- Optional: phasing model visuals
- \* Include sensitivity case if available

### SLIDE 7: THE TEAM & TRACK RECORD

Title: Why You Can Trust the Execution

- Developer, PM, architect, GC, brokerage, legal
- Select relevant past deals (render and short blurb each)
- Awards, press, community relationships

## **SLIDE 8: STATUS & NEXT STEPS**

Title: Here's Where We Are & What Comes Next

- Entitlement / permitting status
- Active stakeholder convos (bank, anchor, community)
- Capital or partnership opportunities remaining
- CTA: "Let's book a walkthrough / deal review session"

## **DESIGN TIPS**

- Use bold headers and short bullets (no body text paragraphs)
- Prioritize visuals: maps, charts, renders > text walls
- Match colours to your brand and property palette
- Add firm contact info & LinkedIn on closing slide

## ro Tip:

A great pitch deck doesn't try to convince everyone. It creates clarity for the few who matter. Investor logic and tenant story and risk plan = confidence.

## **INVESTMENT COMMITTEE PITCH TEMPLATE**

## GET FASTER GREENLIGHTS FROM ICS AND CAPITAL PARTNERS WITH A POLISHED, NUMBERS-FIRST DECK

Audience: CRE acquisition teams, developers, JV partners, fund managers

#### What It's For:

The fastest way to kill momentum in a CRE deal? An unclear or incomplete IC pitch. This template helps you present deals with the **financial clarity, risk framing, and upside** that investment committees require to say "yes."

### INVESTMENT COMMITTEE PITCH TEMPLATE SLIDE FRAMEWORK

## **SLIDE 1: DEAL SUMMARY (SNAPSHOT SLIDE)**

Field	Example	
Project Name	"Eastline Logistics Hub"	
Location	Indianapolis IN (I-70 Corridor)	
Asset Type	Build-to-suit light industrial	
Purchase Price	\$6.8M	
Total Cost	\$14.2M	
Target IRR	16.3%	
Equity Ask	\$4.5M	
Target Close	Sept 1, 2025	

Treat this like your "deal resume" with all major numbers, up front

## **SLIDE 2: LOCATION CONTEXT**

- Satellite map with nearby tenants/infrastructure
- Market highlights (rent growth, vacancy trends, demand drivers)
- Competitive site advantages (zoning, access, cost basis)
- \* Add aerial overlays or photos from site walk

## **SLIDE 3: BUSINESS PLAN & EXECUTION**

- Value creation strategy (e.g., lease-up, repositioning, ground-up)
- Development timeline or renovation plan
- Exit assumptions and holding period
- Partner roles and capabilities
- ✓ Include photos, sample site plans, or program layouts

## **SLIDE 4: FINANCIALS SNAPSHOT**

Metric	Value		
Stabilized NOI	\$1.1M		
Exit Cap	5.85%		
Exit Value	\$18.8M		
Gross Project Cost	\$14.2M		
Equity Multiple	2.1x		
Unlevered IRR	13.4%		
Leveraged IRR	16.3%		

**\*\*** Use charts: CapEx breakdown, equity waterfall, or timeline vs. return

## **SLIDE 5: RISKS & MITIGATION**

Risk	Mitigation	
Tenant delivery risk	Preleasing at LOI stage and spec fallback	
Cost inflation	GC bid secured and contingency	
Financing	Lender soft quotes secured, 2 backups in place	



## Shows you're not naive, and you've pressure-tested the deal

## **SLIDE 6: ASK & TIMELINE**

- Capital needed and preferred structure
- Target commitment date
- Use of funds
- Contact for next steps

"We're looking to finalize equity partners by [DATE], with soft circle responses by [EARLY DATE]."

### Pro Tip:

This deck is not a pitch, it's a risk-balanced thesis. Make your upside believable, your downside defensible, and your execution credible.

## CRE SALES CALL FRAMEWORK (MULTI-STAKEHOLDER DISCOVERY)

## RUN STRATEGIC CONVERSATIONS THAT UNCOVER RISK, REVEAL TIMELINES, AND DRIVE MOMENTUM

Audience: CRE brokers, developers, tenant rep teams, leasing directors

#### What It's For:

Whether you're pitching a development, signing a lease, or courting a capital partner, one call rarely seals the deal. This framework helps you turn first conversations into real momentum by mapping needs, politics, and pressure points early.

## **CRE SALES CALL FRAMEWORK CORE FLOW**

## 1. OPEN WITH POSITION AND PERMISSION (3-5 MIN)

- Frame the call as strategic, not transactional
- Set the expectation that you'll lead the flow, but keep it collaborative

### Example Intro:

"We'll keep this tight and strategic. I'll share a quick overview, ask a few questions to align around goals and constraints, and we'll explore if there's a fit, or at least a next step."

## 2. STRATEGIC DISCOVERY (15-25 MIN)

Split into four sections:

Category	Questions
Context & Timing	"Why is now the right time to be looking at this?"  "What's the ideal timeline for making a decision, and what could delay it?"
Use Case & Fit	"What matters most to your stakeholders: flexibility, timeline, or location quality?"  "Is there a tenant mix or space spec that would rule this out quickly?"
Approval Process	"Who else will weigh in on this, and what matters most to them?"  "Any internal politics or red tape we should be aware of?"
Risk & Red Flags	"What would make this fall apart late in the game?"  "What are the dealbreakers you've seen stall similar opportunities?"

## Bocument this in a simple stakeholder-impact matrix post-call

## 3. PREVIEW POTENTIAL ALIGNMENT (5–10 MIN)

- Recap what you heard
- Offer a light preview of your solution, without pushing

## Example Reframe:

"Based on what you've shared, this looks like a strong fit, but the anchor alignment and delivery timeline are probably where we need to go deeper. Would it make sense to put together a short proposal with two options?"

## 4. DEFINE THE NEXT STEP (3-5 MIN)

- Choose one:
  - o Proposal
  - o LOI
  - Site visit
  - o Intro to another stakeholder
  - o Follow-up with decision team
- \* Always close with clarity: "Here's what you'll get next / by when."

#### BONUS: OBJECTION PRE-EMPTS

Pushback	Reframe
"We're looking at a few	"Totally fair, would it help if I showed how this compares across use case,
"Our team hasn't aligned internally yet."	"That's often where deals stall, would a short alignment doc or 1-pager help build consensus?"

## Pro Tip:

In CRE, the smartest reps don't pitch, they **navigate.** This framework gives you the right questions, structure, and confidence to move complex deals forward with multiple players at the table.

## **MULTI-STAKEHOLDER MAPPING TEMPLATE**

## NAVIGATE DECISION DYNAMICS, ALIGN INTERESTS, AND CLOSE FASTER IN COMPLEX CRE DEALS

Audience: CRE brokers, development VPs, acquisition leads, pitch team strategists

#### What It's For:

Commercial real estate sales are rarely one-on-one. This tool helps you map out **all the players**, from economic buyers to influencers to deal blockers, so your team can manage stakeholder alignment and build momentum across the table.

#### **MULTI-STAKEHOLDER MAPPING TEMPLATE**

## STEP 1: IDENTIFY ALL STAKEHOLDERS

Role	Name	Org	Influence Level	Position
Economic Buyer	CFO	Alpha Capital	High	Supportive
Technical Gatekeeper	Head of Ops	ClientCo	Medium	Neutral
Internal Champion	Project Manager	ClientCo	High	Strong advocate
Legal / Risk	External Counsel	Legal Group	Low	Unknown
End User	Facilities Team	ClientCo	Low	Supportive

**Solution** Use colour coding (green = champion, red = blocker, yellow = neutral)

## **STEP 2: MAP INFLUENCE VS. ALIGNMENT**

Create a quadrant map:

- X-Axis = Decision Influence
- Y-Axis = Support Level

Top right = High Influence, High Support → prioritize

Bottom left = Low Influence, Low Support → deprioritize

**※** Goal: Shift blockers → neutrals, neutrals → allies

## **STEP 3: DEFINE STAKEHOLDER OBJECTIVES**

Stakeholder	What They Care About	How We Help
CFO	Total deal value and ROI	Cost efficiency, revenue potential
Ops Lead	Disruption and workflow	Construction phasing, timeline guarantees
Facilities	Daily usability	Amenities, logistics access, maintenance design
Legal	Liability and contract structure	Clean documentation, proven precedent

## **STEP 4: CREATE A COMMUNICATION PLAN**

Name	Message Focus	Tactic	Owner
CFO	Financial upside and case comps	Deck and financial summary	AE
Ops Lead	Site access and build disruption	Site plan walk-through	Dev lead
PM	Daily progress and momentum	Weekly update call	Account exec

**Bonus: Add touchpoints to CRM or deal sheet calendar** 

## Pro Tip:

Don't just "build consensus." Build **custom messaging per persona**. Then let your champion connect the dots internally with your tools. You're selling to a team, not a title.

## **CRE DEAL OBJECTION REFRAMES**

## REFRAME RESISTANCE, REINFORCE VALUE, AND KEEP DEALS MOVING WITHOUT PRESSURE

Audience: CRE brokers, leasing reps, developers, investment sales teams

#### What It's For:

In CRE, objections are rarely final, they're just signals of uncertainty, risk, or missing alignment. This matrix gives you **trusted reframes** to keep conversations moving, while maintaining credibility and control.

## **CRE OBJECTION REFRAMES**

## **OBJECTION 1: "WE'RE LOOKING AT A FEW OTHER SITES RIGHT NOW."**

What it really means: We haven't seen enough differentiation yet.

Reframe Script:

"Totally understand, it's smart to look around.

Would it be helpful if I sent a side-by-side on location, zoning, and TCO?

Most groups we work with find [Property] shines in [X differentiator]."

**Strategy: Turn comparison into a decision framework you control.** 

## **OBJECTION 2: "THE TIMING JUST ISN'T RIGHT."**

What it really means: Internal alignment is missing or priorities shifted.

Reframe Script:

"Makes sense, timing's everything in deals like this.

Curious: if nothing moves for 3–6 months, what kind of friction does that cause for the business?"

"We can also structure this with flexibility on delivery. Do you want to explore a phased agreement?"

Strategy: Surface cost of delay and offer flexible path

## **OBJECTION 3: "WE'RE NOT READY TO SIGN ANYTHING YET."**

What it really means: They want space, but don't feel urgency or clarity yet.

Reframe Script:

"You don't have to be. Most of our partners start by holding the space with an LOI while they sort approvals.

Happy to share what that looks like. It's non-binding but keeps your options open."

Strategy: De-risk the next step by redefining "signing" as optional commitment

## **OBJECTION 4: "THE PRICE PER SQUARE FOOT IS TOO HIGH."**

What it really means: They're not comparing based on value (or haven't seen the comps).

Reframe Script:

"Let me show you a comp map. If we're above average, it's because of [access/ infrastructure/visibility].

And we've seen tenants save significantly on TI or speed-to-open, which offsets that delta fast."

Strategy: Shift focus from unit cost to total deal value

## NOW."

What it really means: Inertia. They don't feel enough pain to switch.

#### Reframe Script:

"That's totally fair. Sometimes the move has to be worth the lift.

Out of curiosity, what's one thing your team wishes was different about your current space?"

"We can flag this for re-engagement in [Month], want us to stay in touch then?"

\* Strategy: Gently surface dissatisfaction and create future reentry window

## **BONUS PHRASE BANK:**

- "Let's make this easy on your side..."
- "Happy to pencil this in while we sort through the details."
- "If the answer's no, no pressure. I just want to make sure it's an informed no."
- "Here's how other teams we've worked with moved from interest to signature..."
- Use phrases like:

"Would it help if we..."

"Other groups in your space have solved this by..."

"What if we explored..."

"Totally fair, can I show you a variation?"

## Pro Tip:

The best reps don't dodge objections, they **use them as pivot points.** An objection means they're still listening. Give them a reason to keep the conversation going.

## **CRE LOI BUILDER AND DEAL TERM TRACKER**

## STREAMLINE YOUR LETTER OF INTENT PROCESS AND NEVER LOSE TRACK OF CRITICAL TERMS

**Audience:** CRE brokers, leasing agents, investment sales teams, legal/commercial operations

#### What It's For:

The Letter of Intent (LOI) stage is where real estate deals gain, or lose, momentum. This bundle helps you draft fast, credible LOIs and track every key term across all active and pending deals.

## PART 1: CRE LOI TEMPLATE (CORE SECTIONS)

This template is a guide only. It is not legal advice. All agreements should be vetted by your legal counsel.

## 1. DEAL OVERVIEW

Field	Example
Property Address	501 Richmond St W, Toronto
Tenant / Buyer	Everline Tech Inc.
Use Type	Office (flex)
Total SF	7,500

**Set the stage with clarity, no assumptions** 

## 2. FINANCIAL TERMS

Field	Example
Base Rent	\$28/SF NNN
Operating Costs	Est. \$10.50/SF
Term	5 years + 5-year renewal
Escalations	3% annually
Security Deposit	2 months' gross rent

## **\*** Make sure escalation logic is bulletproof

## 3. KEY BUSINESS TERMS

Field	Notes
TI Allowance	\$25/SF, with landlord-selected contractor
Possession Date	June 1, 2025
Free Rent Period	2 months (net rent only)
Signage Rights	Exterior window and lobby directory
Parking	5 spots at market rate

## **\*** Customize to your market and property class

## 4. CONDITIONS & CONTINGENCIES

- Subject to landlord approval
- Final lease agreement within 30 days
- Permitting / zoning for intended use
- Financials or credit check

### 5. SIGNATURE PAGE

Include broker names, company reps, and an expiration date for LOI acceptance

\* Always include: "This LOI is non-binding and subject to definitive lease agreement"

## **PART 2: DEAL TERM TRACKER SPREADSHEET**

Deal Name	Rent PSF	Term	TI	Escalation	Signe d LOI?	Lease Sent?	Notes
Richmond West	\$28	5 + 5	\$25/SF	3%	<b>~</b>		Awaiting final tenant review
Axis Lofts	\$31	3	None	2.5%	X	×	Offer expires Friday

**Use this to compare deals side-by-side, and prevent term slippage** 

## ro Tip:

Your LOI process is your **momentum engine.** This toolkit ensures every deal moves forward clearly, quickly, and cleanly, with no surprises come lease time.

## SITE VISIT CHECKLIST & TOUR SCRIPT

## TURN PROPERTY TOURS INTO DECISION-MAKING MOMENTS WITH STRUCTURE, CLARITY, AND PERSUASION

Audience: CRE brokers, tenant reps, development teams, leasing specialists

#### What It's For:

In commercial real estate, **tours are where deals are won or lost.** This guide helps your team lead walkthroughs that are not just informational, but influential, framed for decision velocity and emotional alignment.

### SITE VISIT CHECKLIST & TOUR SCRIPT

## **PART 1: PRE-TOUR PREP**

- Confirm visitor list (titles and influence level)
- Customize tour route to highlight what matters to them
- Prep leave-behinds (floor plan, pitch sheet, incentives summary)
- Print or save:
  - Key talking points
  - Q&A cheat sheet
  - Comps or concept images for vision-building
    - ✓ Walk the space beforehand to check lighting, signage, cleanliness, access

## PART 2: TOUR SCRIPT (FLEXIBLE BY DEAL TYPE)

Welcome (1-2 mins):

"Glad you could make it. I want to tailor this to your priorities. Do you mind if I ask quickly what you're hoping to evaluate today?"

**Shows professionalism and lets them steer without losing control** 

### Core Walkthrough Sequence (10-25 mins):

Stop	Script Prompt
Entry	"Here's how tenants typically greet guests and manage security"
Floor Plate	"Let me show you how flexible this layout is for hybrid or open-plan teams"
Utilities / Tech	"Power, HVAC, and fiber are already spec'd to handle X. Saves you 4–6 weeks of
Loading / Parking	"Most of our interest has been from logistics and flex users. This bay config is a big reason."
Outdoor/Extras	"One thing people love: the east-facing light in the afternoon and private patio here."

We use each stop to match features to use cases they've describe.

### Close the Tour (3-5 mins):

"Any initial reactions? What's standing out so far?"

"If this were to move forward, what steps do you see next internally?"

"We can hold the space for 10 days if you need to organize approvals. Want me to send over the LOI template?"

## **PART 3: POST-TOUR FOLLOW-UP CHECKLIST**

- ✓ Send recap email within 24 hours
- ✓ Attach any custom documents or updates they requested
- ✓ Log stakeholder reactions in CRM
- ✓ Update deal stage in pipeline
- ▼ Flag for leadership if interest is high-value or urgent

## Pro Tip:

The best tours aren't showings, they're *strategy* sessions on foot. You're not just walking space. You're walking the prospect through **a business decision narrative**.

## CRE REFERRAL BUILDER AND POST-CLOSING FOLLOW-UP TEMPLATES

## TURN EVERY CLOSED DEAL INTO 3 MORE WARM LEADS WITHOUT AWKWARD ASKS

Audience: CRE brokers, tenant reps, investment sales pros, leasing agents

#### What It's For:

In CRE, your best future deal often **already knows your name.** This referral builder gives you the tools to follow up like a pro and earn introductions without sounding needy, salesy, or transactional.

## PART 1: POST-CLOSE FOLLOW-UP SEQUENCE

1 Week After Close: Thank You and Micro-Win

Subject: Congrats, and a small win to share

Hi [First Name],

Just wanted to say thank you again. I really enjoyed working on this with you.

Quick win already: [Example, "Landlord approved TI schedule 2 days early" or "Signage mock-up already in progress."]

Let's definitely stay in touch. I'll send a few insights soon that might help with onboarding or space planning.

[Your Name]

**Creates trust and positions you as proactive** 

## 30 Days After Close: Value Add and Referral Ask

**Subject:** Could I ask a quick favour?

Hi [First Name],

Hope things are going well in the new space.

I've put together a short [checklist / doc / local guide] for teams in move-in mode. Happy to share it if it would be useful.

Also: if you know any other companies growing, relocating, or just exploring options, I'd be honoured for a warm intro. Most of my business comes through great clients like you.

Appreciate you either way 🙏

[Your Name]

Keeps it warm, light, and appreciative

## 60-90 Days After Close: Public Shout-Out and Nudge

Subject: Want to feature your space?

Hi [First Name],

We're highlighting some of the coolest client projects from Q1. Yours is at the top of the list.

Would you be open to a quick photo or testimonial? I'll draft it if that's easier. It's a great way to give your team some love (and helps us too).

And of course, if there's anyone else you think I should be speaking to, feel free to point them my way.

[Your Name]



**V** Dual CTA: gives them visibility while planting referral seeds again

## **PART 2: REFERRAL TEMPLATES**

#### "Ask on Call" Phrase

"Totally off-topic, but if you ever cross paths with another team navigating a lease like this, I'd be happy to be a second set of eyes for them. That's how most of my clients find me."

### **Referral Email Follow-Up**

"Thanks again for the intro to [Name]. I really appreciate it. Let me know if there's anything I can ever help you with in return."



#### Pro Tip:

In CRE, a good deal gets you paid, but a great experience gets you referred. These templates make sure the momentum doesn't end at the lease signing.

## **CRE TENANT PERSONA TEMPLATES**

## UNDERSTAND YOUR IDEAL TENANTS AND TAILOR YOUR PITCH. SPACE, AND INCENTIVES TO WHAT THEY ACTUALLY VALUE

Audience: Leasing agents, development marketers, brokers, acquisition leads

#### What It's For:

Not all tenants are created equal, and most CRE pitches speak in generalities. These templates help you define clear tenant personas by sector, size, and decision driver, so you can speak their language and structure deals they'll say yes to.

## **CRE TENANT PERSONA TEMPLATE**

## PERSONA 1: LOGISTICS OPERATOR (3PL/DISTRIBUTION)

Field	Example
Industry	Third-Party Logistics (3PL)
Typical SF Need	75,000–200,000 SF
Lease Priorities	Dock-high loading, 32'+ clear height, trailer parking
Deal Drivers	Speed to occupancy, flexible TI, low total occupancy cost
Red Flags	Power limitations, low truck court depth
Decision Makers	VP of Ops, Regional Facilities Manager
Messaging Angle	"Get goods to dock faster, with space that's ready to move at scale."



**Bonus: Include comps of other 3PL tenants in region** 

## PERSONA 2: CREATIVE OFFICE TENANT (TECH / MARKETING)

Field	Example
Industry	SaaS, marketing agency, design firm
Typical SF Need	8,000–20,000 SF
Lease Priorities	Natural light, exposed ceilings, fiber internet

Deal Drivers	Talent retention, brand image, amenities	
Red Flags	No parking, outdated lobbies, rigid floorplates	
Decision Makers COO, Founder, Office Manager		
Messaging Angle	"Your culture deserves a space that reflects your edge."	

## PERSONA 3: LIGHT MANUFACTURING / ASSEMBLY

Field	Example	
Industry	Electronics, medical devices, robotics	
Typical SF Need	15,000–60,000 SF	
Lease Priorities	Power capacity, HVAC controls, slab strength	
Deal Drivers	Compliance, workflow, growth capacity	
Red Flags	Zoning uncertainty, dated mechanicals	
Decision Makers	Plant Manager, Head of Engineering	
Messaging Angle	"Where precision meets productivity. Built for regulated workflows and high- efficiency teams."	

## **LEASING MESSAGE GRID**

Persona	Hook Line	<b>Suggested Incentive</b>	Visuals to Include
Logistics	"Ready-to-move access within 2 weeks"	1-month rent	Aerial, dock layout
Creative Office	"Brand-forward space your team wants to come back to"	TI customization credit	Interior renderings
Light Mfg.	"Built for compliance without the CapEx burden"	HVAC upgrades / temp control	Floor plan with power callouts



## Pro Tip:

The more specific your persona, the easier it is to justify your price, speed up the deal, and build trust. Use these in tours, pitch decks, and your marketing content calendar.

## CRE TENANT REP POSITIONING & LEAD MAGNET TEMPLATES

## ATTRACT GROWTH-STAGE TENANTS WITH HIGH-TRUST OFFERS AND CONSULTATIVE MESSAGING

Audience: Tenant rep brokers, advisory firms, boutique CRE agencies

#### What It's For:

Tenant reps don't win business by cold calling. They win by **looking smarter than the landlord's pitch.** This lead magnet helps you clarify your value prop and attract inbound leads with consultative content that tenants *actually want*.

## **PART 1: TENANT REP POSITIONING GUIDE**

### **Core Positioning Formula**

"We help growing companies find the right space, without wasting time on bad fits or overpaying in inflated markets."

### **Emphasize:**

- Outcome (right space, right terms, right timing)
- Insight (you decode landlord fine print)
- Partnership (you don't just tour, you advise)

### **Updated Messaging Language**

Old School	Modern Version	
"We'll find you space"	"We advise growing teams on space strategy and deal terms."	
"Let's set up tours"	set up tours" "Let's clarify what space will support your team before we walk an buildings."	
"We structure deals that protect your growth, for today and 3 yes from now."		

## PART 2: LEAD MAGNET TEMPLATES (FOR EMAIL CAPTURE OR WEBSITE)

### 1. "Office Lease Checklist: 9 Things Landlords Hope You Miss"

Format: 2-page PDF

• CTA Example: "Download our cheat sheet before you negotiate your next lease."

## Topics might include:

- Personal guarantee traps
- Escalation language decoded
- Tenant improvement clauses that cost you later
- Hidden fees in operating costs

## 2. "The 2024 Tenant Guide to Toronto Office Submarkets"

- Format: Map and rent comps and vibe matrix
- CTA Example: "Get our breakdown of cost, flexibility, and vibe, before your CFO asks for the short list."

## Sections might include:

- Top 5 submarkets for hybrid teams
- Flex vs long-term lease pros and cons
- TI/landlord incentive cheat sheet

## 3. "Space Strategy Session: Free 30-Min Deal Terms Audit"

- Format: Lead-in CTA and Calendly integration
- CTA Example: "Before you sign anything, book a quick audit of your term sheet."

# \* Works great as a LinkedIn lead magnet or post-meeting "leave-behind"

# Pro Tip:

Your value isn't "showing space", it's **preventing bad decisions.** Lead magnets and positioning like this help clients see you as an advisor before they've even signed.

# **LEASE NEGOTIATION PLAYBOOK**

# NAVIGATE TERMS, FRAME TRADE-OFFS, AND CLOSE FASTER WITHOUT LOSING VALUE

Audience: Brokers, leasing agents, development execs, tenant reps

#### What It's For:

Lease negotiations can drag on for weeks, or fall apart over details. This playbook equips your team with the **language**, **strategy**, **and fallback options** to close confidently while protecting key economics.

## LEASE NEGOTIATION PLAYBOOK KEY TERMS & STRATEGIES

# **TERM 1: BASE RENT**

When they say: "We need to be under \$24/SF."
Your Frame:

"Let's talk total cost over term. If we can offset CapEx or timing, the rate often works itself out."

## Fallback Option:

- Offer early occupancy at no charge
- Offer 1-month rent abatement instead of rate drop

# **TERM 2: TENANT IMPROVEMENT (TI) ALLOWANCE**

When they say: "That won't cover our build-out."

**Your Frame:** 

"Let's align TI with a longer term, or split the overage based on permanence of improvements."

### Fallback Option:

- Additional TI tied to 7+ year term
- Shift TI funds into free rent credit

## **TERM 3: TERM LENGTH**

When they say: "We want flexibility."

**Your Frame:** 

"We can build that in with an early exit clause or option-to-expand without compromising economics on day one."

### Fallback Option:

- Add rolling renewal clauses
- Blend shorter term with higher base rate and expansion option

# **TERM 4: OPEX / NNN / CAM CHARGES**

When they say: "We need a cap on increases."

**Your Frame:** 

"Let's model year 1–3 and show historic data. It often reassures teams that there's predictability here."

#### Fallback Option:

- Cap on controllable CAM only
- Step-up schedule vs. open escalation

## **TERM 5: DELIVERY & COMMENCEMENT**

When they say: "We can't risk construction delays."
Your Frame:

"Totally understand. We can define a hard outside date or structure partial rent commencement to hedge risk."

#### Fallback Option:

- Outside date with rent waiver until delivery
- Permit-based commencement (not construction completion)

# **BONUS: DEAL FRAMING PHRASES TO USE IN EMAIL OR CALLS**

- "This is often where great tenants and great landlords meet in the middle..."
- "Our goal is to get this done in a way that works for both sides long-term."
- "Here's what I've seen work well in similar deals..."
- "If it's helpful, I can show you how we handled this with [other tenant type]."

## Pro Tip from:

In CRE, the best closers aren't aggressive, they're **calm translators of value and risk.** Every lease term is a lever. Know what you'll give, what you won't, and how to explain why.

# **CRE LEASE RENEWAL EMAIL & OFFER TEMPLATES**

# LOCK IN RENEWALS FASTER WITH STRUCTURED OPTIONS AND LOW-PRESSURE FOLLOW-UPS

Audience: Leasing agents, property managers, brokers, portfolio directors

#### What It's For:

Most CRE renewal deals are lost to **silence, stalling, or confusion.** These templates help you reframe renewals as low-lift wins while guiding tenants toward faster yeses and stronger long-term value.

## **EMAIL TEMPLATES AND OFFER FORMATS**

# 1: 6-MONTH EARLY OUTREACH (WARM PING)

Subject: Planning ahead: Your [Property Name] lease

Hi [First Name],

Noticed your lease is coming up later this year. Many of our tenants find it helpful to review renewal options 4–6 months in advance, especially if upgrades or changes are on the table.

Would you be open to a 15-minute check-in next week to explore options?

[Your Name]

**Starts the conversation early, without pressure** 

# 2: RENEWAL OFFER (SIMPLE EMAIL WITH OPTIONS)

Subject: Renewal options for your current space

Hi [First Name],

Based on your current lease and what we discussed, here are two options we can offer:

Option A (1-year extension):

- Same rate
- Month-to-month flexibility after term
- 1-month rent credit if signed by [date]

Option B (3-year renewal):

- Locked rate with minor annual escalation
- New paint & carpet included
- \$X/SF tenant improvement allowance

Let me know what feels aligned, or if you'd like to discuss a variation.

[Your Name]

**\*** Gives structure while allowing negotiation

# 3: FOLLOW-UP #1 (NO RESPONSE AFTER OFFER)

Subject: Renewal follow-up, still worth exploring?

Hi [First Name],

I'm checking in on the options we shared. I totally understand if timing shifted or you're weighing other considerations.

If it helps, I'm happy to walk through a quick comparison or adjust terms to better reflect your goals this year.

Would next Tuesday or Wednesday work for a touchpoint?

[Your Name]

## 4: FINAL NUDGE BEFORE NOTICE DEADLINE

Subject: [Reminder] Renewal decision window closing

Hi [First Name],

Wanted to make sure you saw the final reminder: our hold on the renewal terms expires this Friday.

After that, we may need to re-market the space or adjust for new incoming demand.

Happy to hop on a quick call to walk through last questions if helpful.

[Your Name]

\* Injects light urgency without sounding aggressive

# **RENEWAL OFFER STRUCTURING TIPS**

Strategy	Use When		
Tiered Offers (short vs long)	Tenant unsure of long-term plans		
TI Credit Swap	They don't want construction disruption		
Rate Lock vs Flexibility	CFOs want predictability or options		
Performance Bonus	Consider a "sign by X" incentive tied to timing		

# ro Tip:

A renewal is the easiest deal to close, if you make it easy to say yes. These templates give you the messaging and offer scaffolding to make that happen.

# **CRE BROKER SELF-MARKETING TOOLKIT**

# BUILD INBOUND VISIBILITY, ATTRACT DEAL-READY LEADS, AND BRAND YOURSELF LIKE A PRO

Audience: Independent brokers, boutique agency leaders, tenant reps, leasing pros

#### What It's For:

You don't need to be a content machine, just **a credible, consistent presence**. This toolkit helps CRE professionals build a trusted personal brand that brings clients to you, not just the other way around.

# PART 1: LINKEDIN POST TEMPLATES (USE 1-2X/WEEK)

## **EXPERT INSIGHT POST**

Template:

"We're seeing a trend in [market/submarket] right now:

- 1. [Change in tenant behaviour]
- 2. [Shift in landlord incentives]
- 3. [Impact on deal timelines]

Here's what smart tenants are doing about it: [Insert tip or call to action]."

**Establishes market fluency and shows you're in the trenches** 

# **DEAL DROP POST**

Template:

"Just helped a [type of tenant] land [size] SF in [location]. What made this one move?

- Landlord flexed hard on TI
- Shorter term, lower escalation
- Creative use of mezzanine space

The right space always has a story. Need help writing yours?"

**Signals momentum without sounding like a pitch** 

# **MYTH-BUSTER POST**

Template:

"Not every tenant needs a long-term lease.

In fact, in [industry X], shorter terms are now a strategic edge.

Let's stop forcing one-size-fits-all space strategy."

🔭 Frames you as an advisor, not just a tour-scheduler

# PART 2: PERSONAL WEBSITE / LANDING PAGE OUTLINE

Sections	to	Inc	lude:

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"Helping growing teams find the right space, faster, smarter, and with better terms."

- 2. What I Do:
- Lease negotiation
- Sublease strategy
- Space planning
- Landlord negotiation
- 3. Why Me:
- 10+ years in CRE
- Closed over 1.2M SF
- Focused on tenant outcomes, not just transactions
- 4. Call to Action:

"Book a quick strategy session" or "Download our lease readiness checklist"

🔀 Can be hosted on Carrd, Squarespace, or Notion

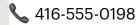
# **PART 3: SIGNATURE AND BIO TEMPLATES**

Email Signature (for Professionalism and Lead Flow)

Jane Morris

Tenant Rep | Toronto Office Market

Helping teams scale smarter through better real estate deals



- Scalendly.com/jane-morris/15min
- janemorris.space
- **Include booking link and single CTA**

# LINKEDIN "ABOUT" SECTION (SHORT & SHARP)

"I help growing companies make real estate decisions that don't just fit today, but scale with them.

From submarkets to subleases, I simplify the process and negotiate like it's my own name on the lease. Let's find your next great space."

# 🚖 Pro Tip:

In a noisy market, you don't need to be louder, just **clearer and more consistent.** This toolkit makes sure the right people know what you do, and why they should trust you to do it.

# **CRE SALES EMAIL TEMPLATES**

# BOOK MEETINGS, FOLLOW UP FASTER, AND MOVE DEALS FORWARD WITH PERSUASIVE, PROFESSIONAL EMAILS

Audience: CRE brokers, leasing agents, acquisition teams, development execs

#### What It's For:

In CRE, deals don't die from objections, they die from silence. These email templates help your team cut through inbox noise with **clear, credible messaging** that earns responses and advances conversations.

## **CRE SALES EMAIL TEMPLATES TOP USE CASES**

## 1. INTRO EMAIL - PROSPECTING NEW TENANT OR BUYER

Subject: Prime [Property Type] Opportunity in [Submarket]

Hi [Name],

I wanted to share an opportunity we think aligns closely with your team's goals in [location/sector].

[Brief value prop, e.g., "This site offers 28' clear height, logistics access, and is one of the last zoned parcels in the corridor."]

Happy to send a one-pager or walk you through comps. Just say the word.

Best,

[Your Name]

Pro Tip: Keep it short and benefit-led. Skip the backstory.

# 2. FOLLOW-UP AFTER NO RESPONSE

Subject: [Property] still open for tour

Hey [Name],

I wanted to see if [Property] is worth a look this quarter. Still open for early walkthroughs.

Let me know if you'd prefer a quick call or just want the datasheet.

Cheers,
[Your Name]

Pro Tip: Be casual but clear. Don't guilt, re-offer value.

#### 3. POST-TOUR RECAP EMAIL

Subject: [Property], Key Details and Next Step Options

Great walking the site with you today. As promised, here's:

- Datasheet and updated floor plan
- Rent comps for nearby Class B assets
- Option to hold the space pending LOI discussion

If helpful, happy to hop on a quick call to run through scenarios.

Appreciate your time, [Your Name]

Pro Tip: Recaps should show you're proactive and organized.

## 4. LOI COORDINATION EMAIL

Subject: Confirming LOI Terms and Timeline

Hi [Name],

Attached is our draft LOI incorporating the terms discussed:

Base rent: \$XX/SF

TI Allowance: \$XX

Commencement: [Date Range]

Additional Terms: [Option, parking, etc.]

Let me know if you'd like to review on a call, or feel free to redline directly.

Targeting final signatures by [Date] if aligned.

Thanks again, [Your Name]

# **5. RE-ENGAGEMENT EMAIL – DORMANT DEAL**

Subject: Still considering options in [Area]?

Hi [Name],

Not sure if this is still on your radar, but wanted to send a quick update:

- [Property] still available as of this week
- [New comp or incentive] now in play
- [Another tenant] moved on space across the street

Happy to reconnect if it's helpful.

Best,

[Your Name]

**\*** Use time, movement, or new intel to reopen the door.



Templates are only powerful when they feel **personal and situational**. Add 1–2 custom lines that show you're tracking their **context, not just your calendar.** 

# **WHAT'S NEXT?**

If you found this toolkit valuable, here are three ways to go further:

## 1. Book a Strategy Call:

Let's map these frameworks directly to your current challenge.

Book Your Call Here

#### 2. Download Another Toolkit:

Explore toolkits for sales, leadership, persuasion, and negotiation.

See our Tool Kit Library HERE

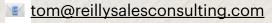
## 3. Subscribe to the Drip Series:

Get deeper behavioural strategies, templates, and case studies, delivered in 5-minute reads.

The opt-in is at the bottom of THIS PAGE

#### **Questions? Feedback?**

Reach out directly: Tom Reilly



math reillysalesconsulting.com | limbinic.com



#### Reilly Sales Consulting (RSC)

"Where closing psychology meets bulletproof sales systems."

Reilly Sales Consulting helps B2B sales teams close faster, with less friction, and greater predictability.

We install frameworks rooted in behavioural science that unlock complex buying groups, surface hidden objections early, and engineer decision-making confidence, without the pressure tactics that buyers resist.

Whether you're scaling SaaS, professional services, industrial manufacturing, or founder-led growth, RSC gives your team the psychology-driven edge to win faster, bigger, and more often.



### **Limbinic Consulting**

"The Science of Influence for High-Stakes Professionals."

Limbinic empowers leaders in law, consulting, financial services, and other high-stakes industries to master the art and science of influence.

Our frameworks combine cognitive science, courtroom persuasion tactics, and elite-level strategic communication to help you shape outcomes where stakes, and scrutiny, are highest.

From closing multi-million-dollar contracts to winning high-risk negotiations, Limbinic gives you the tools to influence like a superpower.