

SYSTEMS FOR SUCCESS 12.0 PROGRAM OVERVIEW

The Business Development Machine 12.0

For years Mike has been providing Brokers with the industry's leading best practices. Our most comprehensive course to date, The Business Development Machine guides commercial real estate practitioners through the daunting task of staying "Top of Mind, Easy to Find". In this module Mike covers a series of best practices to include:

1.1 | Prospecting Essentials

1.2 | Blueprint for Business Development

1.3 | Your Foundation is Your CRM

1.4 | Prospecting in Action

Practical Applications of AI for Commercial Real Estate

AI is no longer the future—it's the competitive advantage shaping the business world today. From streamlining workflows to uncovering insights no human could detect alone, AI is transforming how industries operate—and commercial real estate is no exception. This training, led by Tim Rios, explores how AI is redefining tenant representation, capital markets, and leasing. Through hands-on applications, you'll learn to enhance business development, sharpen negotiations, streamline property tours, and design data-driven leasing strategies. Walk away with immediately applicable tools to make smarter decisions, boost efficiency, and deliver stronger client outcomes—keeping you ahead in today's market

- 2.1 – The purpose of AI
- 2.2 – Using AI as an Assistant – LOI/Proposals & More
- 2.3 – AI for Productivity: Lease Abstracts & More
- 2.4 – Using AI to Improve Call Productivity

Selling by Phone 12.0

For most commercial real estate practitioners, the least favorite business development activity is clear—cold calling. Yet, the ability to sell effectively by phone remains one of the strongest predictors of long-term success. Too often, brokers fall short of reaching enough prospects to consistently win new business. Whether the challenge is call reluctance, lack of preparation, or navigating gatekeepers, Mike Lipsey delivers practical strategies to transform phone outreach into a powerful business development tool.

- 3.1 – Three Types of Calls
- 3.2 – 8 Step Process (The Money Question)
- 3.1 – RUNS CLEAR Exercise

Best Practices for Landlord Rep/Agency 12.0

Performance leasing is straight forward – create a plan of measurable, specific action for leasing a space, and empower landlords to evaluate your performance. The question many ask is “How do we present this to the client and win more business?” In this module Mike discusses the most important items to consider and best practices to win the listing.

- 4.1 – The Roadmap to Occupancy
- 4.2 – Driving NOI with a Measurable Plan
- 4.3 – Pricing Vacancy & Streamlining Documentation
- 4.4- The Tour is the At Bat

Best Practices for Tenant Rep/Occupier 12.0

Tenant Representation remains one of the most competitive arenas in commercial real estate. Each year, new brokers enter the field, intensifying the competition and leaving many struggling to differentiate themselves. For decades, Mike Lipsey has been the trusted advisor helping brokers not only break into this sector but also guide clients through the complex process of selecting the right building. In this module, Mike shares proven best practices to stand out, win assignments, and deliver exceptional results.

- 5.1 – Identifying Users & Their Future Demand
- 5.2 – Industry Rent to Revenue Ratio – Creating the User’s Budget
- 5.3 – Dollars to Occupy Ratio – Comparing Budget to Market Proposals
- 5.4 – Comparing the Subjective Considerations – A Proper Blend & Extend

Presentations that Win 12.0

One of The Lipsey Company’s most in-demand programs, Presentations That Win equips commercial real estate teams with the skills to communicate clearly, persuasively, and with confidence. In a competitive market where clients judge a team’s strength by the quality of its presentation, the stakes couldn’t be higher. In this program, Mike Lipsey shares proven, industry-specific strategies to help your team stand out, win client confidence, and secure more deals.

- 6.1 – Two Models– The Five Step Classic
- 6.2 – Two Models – The Yellow Pad
- 6.3 – Presentation Best Practices
- 6.4 – Presentation Show Stoppers
- 6.5 – Presentations that Win Lessons Learned

Closing Techniques 12.0

After a thorough needs analysis, a strong presentation, and careful financial review, the moment comes to secure the commitment. This critical stage requires brokers to recognize the right closing approach that moves the client to action. With The Lipsey Company’s proven techniques, closing becomes a seamless extension of the conversation—focused on the client’s needs and guided toward a successful outcome.

- 7.1 – Live Exercise – How and When to Use Summary Closes, Special Sauce, Deal Swagger and many more

Technology in Commercial Real Estate

Technology is transforming every aspect of commercial real estate—from how prospects are reached to how deals are closed. In this module, Tim Rios shares his expert recommendations on the most effective tools available to today's practitioners. Tim explores cutting-edge solutions for marketing, lead generation and management, data analytics, virtual tours, communications, and research. By implementing the right technologies, brokers can boost productivity, expand their pipeline, and ultimately drive greater production.

8.1 – Marketing, Lead Generation & Management Tools

8.2 – Data Analytics

8.3 – Virtual Tours, Communications & Research

Best Practices for Teams 12.0

Breaking through a performance or earnings plateau starts with a strong, cohesive team. Drawing on his experience consulting with hundreds of commercial real estate teams nationwide, Mike Lipsey has identified the five core elements that set topperforming teams apart. In this module, he reveals the foundational principles and daily practices that drive collaboration, productivity, and sustained success—giving your team the blueprint to elevate performance and achieve more.

9.1 – Check the Five Boxes

9.2 – Systems and Strategies for Teams

9.3 – Your Team Machine: Roles & Responsibilities

How To Crush Your First Two Years

You've got the talent and the ambition. Now, get the roadmap to a successful career in commercial real estate. In this exclusive video training module, industry veteran John Crossman, CCIM, CRX shares his proven strategies for not just closing the deal, but for making a significant and lasting impact within your first two years. Drawing from his wealth of experience, John distills his "ideal recipe for success" into actionable, easy-to-digest lessons.

10.1 – Dig Your Roots

10.2 – The Recipe to Success

10.3 – Invest in Yourself

Making Habits Stick

Break through your biggest challenges and achieve consistent success. In this powerful training module, Tim Rios, a seasoned veteran with extensive experience managing national commercial real estate offices and working with practitioners worldwide, reveals the key to building lasting habits. Tim knows that determination and consistency are the true drivers of success. In this module, he shares the best practices he has honed over his career—strategies that have helped hundreds of brokers get past the “hump” and reach their full potential.

11.1 – The Power of Consistent Habits

11.2 – Small Habits, Big Results

How to Dominate Commercial Real Estate Conferences

You’ve made it to your first conference—now what? In this module, John Crossman, CCIM, CRX, provides a step-by-step blueprint for maximizing every conference experience. Drawing on years of hands-on experience, John shares the strategies and best practices that ensure you leave with more than just a few good stories. Learn how to deliver value to your clients, expand your network, and turn a few days away from the office into measurable business results.

12.1 – Conference Goals

12.2 – Preparing for the Conference

12.3 – Post Conference Activities

Maximizing Your Resources

Success in commercial real estate goes far beyond closing deals—it’s about managing your business, your relationships, and yourself. John Crossman, CCIM, CPX, shares the mindset and strategies that have fueled his success, emphasizing continuous learning and growth. In this module, John walks you through his best practices and what he considers the ultimate recipe for success, giving you the tools to leverage your resources, strengthen your network, and elevate your career.

13.1 – Become an Expert

13.2 – Evaluate Yourself

13.3 – Creating Your Brand & Business Plan

Commercial Real Estate Strategies

A broker's career extends far beyond meeting immediate client needs—it's about building a long-term vision. Josh Harris, Ph.D., CRE, CCIM, CAIA, shows how strategic planning for both brokers and companies drives growth, scalability, and even thoughtful downsizing. In this module, Josh takes you behind the scenes of tactical strategy development, revealing the tools and approaches that allow you to align objectives, make informed decisions, and better serve your clients while advancing your own career.

14.1 – Core Elements of a Specific Plan

14.2 – Timing & Creation of the Plan

14.3 – Real Estate Firm Focus Area

Professional Investors

Beyond institutions, pension funds, and public markets lies a unique realm of professional investors. Who are they, how did they get there, and what regulations govern this sector? In this module, Tim Rios provides clear answers and insights, guiding commercial real estate practitioners through the intricacies of working with professional investors and equipping them with the knowledge to navigate this specialized market with confidence.

15.1 – Professional Investors: Regulations

15.2 – Professional Investors: Documentation

15.3 – Professional Investors: Waterfall Structures

Economic Selling

Josh Harris, Ph.D., CRE, CCIM, CAIA, explores Economic Selling through the lens of behavior as a conduit for understanding client decisions. In this module, participants will examine the three major buyer motivators, analyze economic cycles, and navigate market realities. By applying behavioral insights, brokers can align their strategies with client needs, anticipate trends, and make more informed, resultsdriven decisions.

16.1 – Human Emotions: The 3 Major Motivations

16.2 – Economic Cycles

16.3 – Commercial Real Estate Market Realities

30-Minute Cities

Josh Harris, Ph.D., CRE, CCIM, CAIA, explores the transformative concept of the 30-minute city—where residents can access work, shopping, and amenities within a 30-minute journey. In this module, participants will learn how understanding and applying the principles of 30-minute cities can give commercial real estate practitioners a competitive edge, allowing them to offer clients smarter, more strategic solutions and stand out in the marketplace.

17.1 – Why do Cities Grow & Form

17.2 – Defining the 30 Minute City

17.3 – The Future of Cities

Lipsey Classics

How to Create a High Performing Team

18.1 Components of a Team

18.2 Personality Insights Part I

18.3 Generational Gaps

18.4 Personality Insights Part II

18.5 Accelerating Your Career with DISC

The Perfect Tour

19.1 The Tenant's Experience

19.2 Flash Tours

19.3 Making it Memorable

Managing Objections

20.1 Recognizing Objections

20.2 Handling Objections

20.3 Live Exercise – Stump the Chump

Your CRM

21.1 Creating a Living Database Part I

21.2 Creating a Living Database Part II

Thriving in a Secondary Market

22.1 Define Your Value

22.2 Creative Ways to Make It in a Secondary Market

22.3 The Pearls Part I

22.4 The Pearls Part II

The Whole Brand

23.1 The Whole Brand – 7 Keys

23.2 Building a Marketing Plan around Your Brand

Fundamentals of Commercial Real Estate

- 24.1 Fundamentals of Commercial Real Estate: Multifamily
- 24.2 Fundamentals of Commercial Real Estate: Retail Properties
- 24.3 Fundamentals of Commercial Real Estate: Office Prosperities
- 24.4 Fundamentals of Commercial Real Estate: Industrial Properties
- 24.5 Fundamentals of Commercial Real Estate: Undeveloped Land & Lots
- 24.6 Fundamentals of Commercial Real Estate: Senior Housing
- 24.7 Fundamentals of Commercial Real Estate: Hospitality Properties
- 24.8 Fundamentals of Commercial Real Estate: Special Use

Financial Literacy for Commercial Real Estate

- 25.1 Commercial Real Estate Rules of Thumb
- 25.2 Calculator Basics
- 25.3 Basic Financial Calculations Part I
- 25.4 Basic Financial Calculations Part II
- 25.5 Advanced Calculations Part I
- 25.6 Advanced Calculations Part II
- 25.7 Six Steps to BOV
- 25.8 Underwriting Essentials

Investment Sales: Finding the Outlier 7.0

- 26.1 Calculating a BOV
- 26.2 Win the Investment Listing

Lease vs Own

- 27.1 Why Lease vs Own
- 27.2 Lease vs Own – Part I
- 27.3 Lease vs Own – Part II

Sale Lease Back

- 28.1 Intro to Lease Valuation
- 28.2 Building the Lease Valuation Model – Part I
- 28.3 Building the Lease Valuation Model – Part II

Lease Buy Out

- 29.1 Lease Valuation Basics
- 29.2 Lease Buy Out Case Study: Creating an Excel Workbook
- 29.3 Lease Buy Out Case Study: Results

Deal Making Finance (1031 Exchange)

- 30.1 1031 on a Macro Level
- 30.2 Calculating Depreciation