

# The Lipsey Company 2021 Training Menu

# Lipsey

## 1. The "50/50" - Strategy for winning Presentations

- 1.1 Client Discovery & Questioning Techniques
- 1.2 Model for Wining Presentations
- 1.3 Client, Market & Measurable Approach
- 1.4 Yellow Pad 50/50

## 2. Win More Tenant Rep Assignments

- 2.1 Associations, membership and Participation
- 2.2 Industry Rent to Revenue Ratio
- 2.3 Calculating Dollars to Occupy Ratio
- 2.4 Lease Resolution Worksheet

## 3. Team Brokerage

- 3.1 Personal Insight
- 3.2 High Performing Team
- 3.3 Team Structure
- 3.4 Measuring Accountability

## 4. Rain Making, Selling by Phone

- 4.1 Developing a Call List
- 4.2 Identifying Emerging Opportunities
- 4.3 Client Discovery & Questioning Techniques
- 4.4 Eight Step Process

## 5. Performance Leasing

- 5.1 Developing a Sales & Leasing Plan
- 5.2 Identifying Emerging Opportunities
- 5.3 Business Development
- 5.4 Transaction Management

## 6. Closing Techniques

- 6.1 Questioning Techniques
- 6.2 Closing Situation
- 6.3 Lipsey Closing Techniques
- 6.4 Attitude that Produce Results

## 7. The Perfect Tour

- 7.1 Ten Step Approach
- 7.2 Questioning Techniques
- 7.3 Features & Benefits
- 7.4 A Winning Tour

## 8. Negotiating

- 8.1 Psychology of Negotiation
- 8.2 Tactics / Neutralizing Techniques
- 8.3 Settlement Range
- 8.4 Strategies for Leverage

## 9. Client Discovery & Needs Analysis

- 9.1 Needs Analysis Using Run Clear
- 9.2 Questioning Techniques
- 9.3 Stair Step Interview
- 9.4 Handling Objections

## 10. Investment Brokerage

- 10.1 Team Advantage
- 10.2 Model for Winning Presentations
- 10.3 Tracking Team Activity
- 10.4 Accountability Timeline

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## 11. Consultative Brokerage

- 11.1 Services that Sell
- 11.2 Menu of Advisory Services
- 11.3 Methods of Compensation
- 11.4 Assembling a Team

## 12. Identifying Emerging Market

- 12.1 The Right Market
- 12.2 Getting Involved
- 12.3 Intuitive vs. Intentional
- 12.4 Forms of Contact

## 13. Scheduling Your Success

- 13.1 The Great Equalizer
- 13.2 The Power of the Calendar
- 13.3 Calculating Your Fee
- 13.4 Reverse Time Management

## 14. The Black Swan

- 14.1 Cost of Capital
- 14.2 Investor Expectations
- 14.3 Calculating Value
- 14.4 The Black Swan

## 15. Calculator Workshop

- 15.1 Introduction: HP 10 BII
- 15.2 Key Financial Concepts
- 15.3 Calculations for Commercial Real Estate
- 15.4 Practice Problems

## 16. Financial Literacy for Tenant Rep

- 16.1 Calculating Dollars to Occupy Ratio
- 16.2 Present Value for a Lease
- 16.3 Lease Comparison, Blend & Extend
- 16.4 Lease Buyout Analysis

## 17. Financial Literacy for Landlord Rep

- 17.1 Market Leasing Assumptions
- 17.2 Tenant Credit Underwriting
- 17.3 Bakke Lipsey
- 17.4 Modeling Cash Flows

## 18. Lease vs. Own Analysis

- 18.1 Discounts and Interest Rates
- 18.2 Example Problems
- 18.3 Comparison using Net Present Value
- 18.4 Comparison using IRR

## 19. Making the Capital Stack Dance

- 19.1 The End of BOV's
- 19.2 Defining the Black Swan
- 19.3 Understanding Buyer Types
- 19.4 Black Swan Analysis

## 20. Selling Financial Services

- 20.1 Articulating Key Financial Terms
- 20.2 Selling Services
- 20.3 Winning More Assignments
- 20.4 Closing Techniques