

# CLIENT RETENTION THROUGH SERVICE STRATEGY

## Bundle of Two

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### Turn Property Expertise into Winning Proposals

Combine commercial real estate knowledge with property management skills to craft bids that impress and deliver.



#### **Leasing & Tenant Advisory**

Navigate every phase of the deal— strategy, search, execution, and exit—with data-driven confidence.



#### **Landlords & Property Management**

Build profitable, compliant portfolios and strengthen tenant relationships.



# OVERVIEW

**Name:** Client Retention Through Service Strategy

**Format:** Bundle of Two

## TURN PROPERTY EXPERTISE INTO WINNING PROPOSALS

Combine commercial real estate knowledge with property management skills to craft bids that impress and deliver.

### IDEAL FOR:

- Proposal writers & bid managers – integrating property insights into submissions
- Commercial real estate professionals – enhancing market and asset understanding
- Property managers – showcasing operational strengths in proposals
- Asset and portfolio managers – linking performance to bid success
- Project and operations teams – supporting delivery commitments

### SKILLS YOU WILL MASTER:

- Master a deep understanding of market and asset dynamics
- Enhance your skills to integrate property operations into proposals
- Build confidence in managing property performance commitments
- Develop the ability to communicate property value clearly to stakeholders
- Strengthen collaboration skills between proposal and property teams

### WHAT'S INSIDE THE TOOLKIT:

- Market analysis and property assessment templates
- Proposal integration checklists for property operations
- Asset performance monitoring frameworks
- Communication guides for stakeholder engagement
- Case studies of successful property-backed bids

### WHEN TO CHOOSE THIS COLLECTION:

- You need to deepen your understanding of property markets and asset dynamics to shape stronger proposals
- You want to confidently integrate property operations and performance into bid submissions
- You're responsible for communicating property value clearly to stakeholders and clients
- You aim to improve collaboration between proposal teams and property management professionals
- You want to develop bids that reflect operational excellence and market insights, strengthening your competitive edge

# COURSE LIST

## LEASING & TENANT ADVISORY

*Navigate every phase of the deal—strategy, search, execution & exit—with data-driven confidence.*

### SHORT COURSES

*(20-40 min micro-modules • From AUD \$9.99 ea • Self-paced)*

#### Client Engagement & Strategy Development

- Portfolio Strategy Finalisation: Secure Stakeholder Consensus
- Premises Readiness – And the Help of the Occupier Focused Service Team
- Strategic Brief Alignment: Bridge Business Goals & Property Solutions
- Strategic Needs Analysis for Commercial Real Estate Decisions
- Strategic Space Optimization: Stay vs. Go Analysis
- Strategic Tenant Rep Brief Development
- The Property Acquisition Plan – Methodology Used by the Tenant Representative
- The Role of the Tenant Representative – Attributes and Engagement
- Understanding the Needs of the Business
- Workplace Strategy and Space Planning

#### Inspections, Options & Shortlisting

- Familiarizing with What's on the Market
- From Search to Shortlist: Preferred Options & Lease Negotiations
- Premises Sourcing – Preparing the EOI and the Review of Market Submissions
- Reviews and Inspections – Getting the Client across the Options

#### Lease Execution & Documentation

- Functions and Skills of the Lease Admin
- Introduction to Commercial Leasing – Lease Types and Rental Structures
- Introduction to Commercial Leasing – Sub-leasing
- Introduction to Lease Abstraction
- Lease Admin Analytics and Tools
- Negotiation and Heads of Agreement – Requesting the Heads
- Negotiation and Heads of Agreement – Concluding the Deal
- Outsourcing of Lease Abstraction



#### Lease Execution & Documentation (cont.)

- Strategic Leasing Due Diligence: Mitigate Lease Execution Risks

#### Lease Exit & Transition Planning

- Lease Exit & Makegood Obligations Mastery
- Lease Exit Strategy
- Transition Planning – Risk Profiles and Relocation Strategy

# COURSE LIST

## LANDLORDS & PROPERTY MANAGEMENT

*Build profitable, compliant property portfolios and stronger tenant relationships.*

### SHORT COURSES

*(20-40 min micro-modules • From AUD \$9.99 ea • Self-paced)*

#### Agency & Advisory Roles

- A Well-Planned Property Inspection
- Information Required from the Landlord – Drafting the Agency Agreement
- Tailoring Documents to Meet Tenant Requirements – Examples of Practical Applications
- The Agency Agreement
- The Role of the Landlord and Their Advisors – Attributes and Engagement
- The Role of the Tenant and Their Advisors – Attributes and Engagement

#### Asset & Building Management

- Capital Improvements and Property Upgrades
- Property Management – Planned Maintenance Plans
- Property Management – The Importance of a Condition Report
- The Building Concierge – What Do They Do?
- Understanding the Importance of Building Grades in Commercial Real Estate

#### Compliance, Risk & Sustainability

- Crisis Response and Emergency Planning
- Disaster Resilience and Sustainability
- Environmental Risk & Continuity Planning for Property Professionals
- ESG Compliance & Strategy in Real Estate
- Risk Management and Insurance
- The Legal Side of Property Management

#### Due Diligence & Lease Preparation

- Due Diligence and the Property Review
- Due Diligence Essentials for Real Estate Investment
- Quantity Surveyors – Adding Value to Your Real Estate Strategy
- Reviewing the HOA – and the Due Diligence Required of the Team



#### Due Diligence & Lease Preparation (cont.)

- The Role of REI Forms and Solicitor Prepared Documents
- Types of Draft Lease Documents and Terms You Should Negotiate

#### Financial Management & Securities

- Bank Guarantees
- Fees and Who Pays for Them in Different Situation
- Strategic Leasing: Financial Modelling & Negotiation
- Tenant Securities, Bonds and Insurance Providers

#### Incentives, Contributions & Lease Structuring

- Incentives and Contributions – Exploring the Various Types
- Lease Structures and Types
- Market Differentiation and Leasing Strategy

#### Leasing Fundamentals

- Introduction to Lease Terms and Lease Language
- Lease Essentials – Financial Analysis of Offers
- Mastering Probing Questioning Techniques
- Property Procurement – Leasing Agreements – What Are They?

#### Makegood & End-of-Lease Management

- Introduction to Make-Good

# COURSE LIST

# LANDLORDS & PROPERTY MANAGEMENT

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## SHORT COURSES

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### Negotiation & Tenant Relationship Management

- Negotiation Strategies for Rent Reviews
- Property Negotiations – Preferred and Secondary Options
- Tenant Retention and Relationship Management

### Rent Review & Valuation

- Introduction to Rent Reviews
- Legal and Regulatory Considerations in Rent Reviews
- Outgoings as Factors in the Rent Review
- Rent Review Methods and Mechanisms







# HOW TO SIGN UP

## One Price. Immediate Results.

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#### Access Duration:

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