

**SENIOR  
LEADERSHIP  
SUMMIT**

CHICAGO, ILLINOIS  
APRIL 22-23, 2014

**Cross-selling,  
Pricing and New  
Business  
Development**

**Gary Helminski, Marla Maloney,  
Noble Carpenter, Greg Schuster,  
Kevin Hughes**

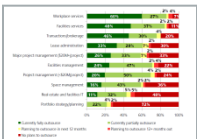
# Why Cross-sell?



## Top Brokers Cross-sell



## Top Clients Buy Multiple Services



## Top Prospects Buy Multiple Services



## Differentiate While Prospecting



## Multiple Services = Better Retention

# Keys to Cross-selling



**Know the Platform**

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**Trust the Platform and Stakeholders**

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**Go it Alone or Bring Them In?**

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**Can't You Just Give Me Some Collateral?**

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**Speaking the Client's Language**

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**Project &  
Development  
Services**

**Gary Helminski**

# Principles of Cross-selling

- ✓ Serving our clients = Good!
- ✓ Clients want ALL of our products and services.
- ✓ Clients want our expertise—cross-selling demonstrates.
- ✓ More you sell to clients = Harder to break away.
- ✓ Sell one more service to every client, every year.



# PDS Active Client Roster

Aaron's  
Ace Cash Express  
Aegon, USA  
American Psychological Association  
American Society of Hospital Pharmacists  
Ariad Pharmaceuticals  
Arison Family  
Arrowhead General Insurance  
Ballard Spahr  
Bayer Crop Science  
Beacon Capital Partners  
Behringer Harvard  
Benchmark Brands  
Benjamin Moore & Co.  
BioAgilytix Labs  
Blackrock Realty  
Bristol Meyers Squibb  
Brookfield Group  
Brookfield Partners  
Brookfield Residential Properties  
Burr, Pilger, Mayer  
Capital One  
Cardno  
Carlton Fields  
Carolina Commercial Investment Properties  
Carter's Inc.(OshKosh)  
Cassidy Turley  
CBS News  
Chick-fil-A  
Clarion Partners

Clarks  
Clarkston Consulting  
Clear Channel  
College Board NY  
Columbia Properties  
Compass Group  
Couchbase  
County of San Diego  
CPS  
Cricket Communications  
CW Capital  
Davis Moore Capital  
DEB Shops, Inc.  
DEKA  
Delaware Life  
Delta Community Credit Union  
Dentistry for Children  
Denver Chamber of Commerce  
DestinationXL  
DRA Advisors  
Edward Jones  
Electric Cloud  
EMC  
Energy Transfer  
Engility  
Epsilon  
Equity Office Properties  
Exxon Mobil  
Fannie Mae  
Fast Signs  
First Citizens Bank  
Fleetpride  
Flextronics  
Fox News Channel

Frederic Fekkai  
Garbanzo  
Garrison  
George Washington University

**Google**

**GoPro**

HCA  
Hearst Corporation  
Hogan Lovells  
Horack Talley  
Hudson Americas  
Hudson Legal  
IndCor  
Industrial Income Trust  
Institute for International Finance  
ISN  
JA Cosmetics (Confidential)  
JP Morgan  
KBS  
Koch Industries  
Lewis Brisbois  
Lewis PR  
Lexington Realty Trust  
Lionstone  
LMI  
LNR  
Loring Ward  
M&T Bank  
Makepeace

**National Credit Union Administration**

Northern Trust  
Northwood RTC, LLC  
NuVasive

**Oracle**

Patton Boggs  
PCORI  
Pearl Therapeutics  
Petrus/Crown West Realty  
PEW Charitable Trusts  
Pew Research Center  
Plantation Point Development  
Property Reserve, Inc  
Prudential  
Rawlings  
Red Mango  
Responsys  
Riverbed Technology  
Robert Half International  
Rockrose  
Rue La La  
Salix Pharmaceuticals

**SF Travel**

Sleep Train  
Somerset Properties SPE, LLC

The Art of Shaving  
The College Board  
The UPS Store  
TIAA  
Tide Dry Cleaners  
Transportation Authority

**Turn**

Union Investment Real Estate  
United Methodist Publishing  
United Regional ED  
UHS Bank Retail

**Varian 4B**

Vistaprint  
Washington Design Center  
Weight Watchers  
Wolf Greenfield  
Wolverine  
Yahoo!  
Year-Up  
Zimmer Corp

# Institutional Clients

## Adding Value Through:

- Land Planning – Uses, Density, Entitlements
- Development
- Capital Planning
- Building Modernization
- Sustainability
- Tenant PM Coordination





# Occupier Clients

## Adding Value Through:

- Development
- Workplace Strategy
- Tenant Project Management
- Sustainability
- Program Roll Outs





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**Building  
Management  
Services**

**Marla Maloney**

# Cross-selling

## Clients



6.1 MSF

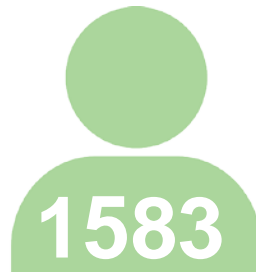


780,000 SF



1.1 MSF

## Associates



## Assets



Fountain Place



Market Square



Nashville West



600 California

# New Business Development

Differentiate Sales Cycle



“Typical” Fee Structure



“Ideal” Staffing Model



Product Type Staffing



Kingsley Associates Survey



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**Capital Markets**

**Noble Carpenter**



# Red Flags



Short Notice



“Come Alone”



Sudden Involvement

# Pivotal Events

- ➔ Large Vacancy
- ➔ Stagnant Leasing
- ➔ Major Lease Execution
- ➔ Redevelopment or Repositioning
- ➔ Length of Ownership

Fee Sharing = Cross-selling

+20%

# Tri-State Success Story

## Adversity: Leading Through Innovation

- 6 sales brokers on 2012 reduced to 2 in 2013
- Reorganized: Merged NJ and NY teams to one
- Focus on NJ Industrial: competition; market knowledge
- Collaboration with Baltimore
- Weekly meetings; office dynamic

## Results...

- 2013: Two closed industrial sales: \$55M
- 2014: Three industrial sales UC and one in market - \$170M; one financing in market - \$65M; awarded 1M sf portfolio sale from GE/ Hampshire - \$85M



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**Occupier Services**

**Kevin Hughes and Greg Schuster**

# Cross-Selling Success

## Traditional Retail Corp Services Outsourcing

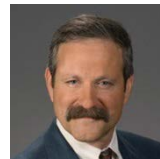
### Clients



### Local Partners



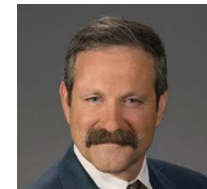
Mark Mulvey



Kirk  
Diamond

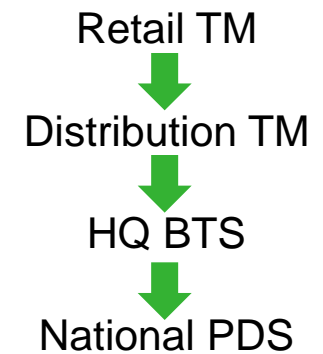
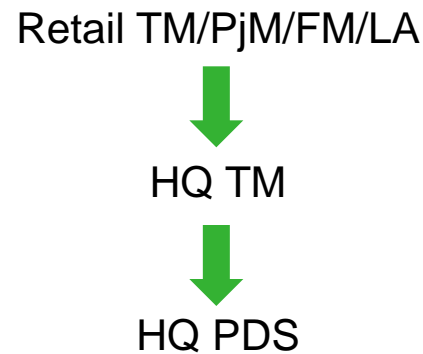
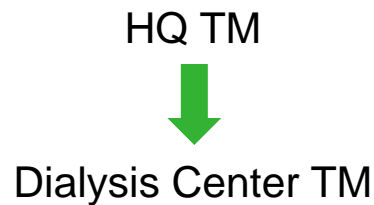


Rob  
Learnard



Kirk Diamond

### Scope



# Cross-Selling Success

## Supporting the Platform

### Clients



### Broker Partners



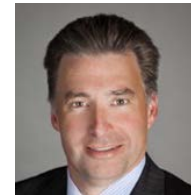
Dale Powell



Mike  
Hartmann



Bob Ryan



Frank McCafferty

### Scope

TM



Full Service  
Outsource

TM



Strategic Consulting



FM/Asset  
Management

TM/PLA/SC