

# Belvoir Marketing

Brokerage Support: Best Practices, Processes,  
and Procedures



**BELVOIR**

REAL ESTATE GROUP, LLC

*Going Places*

BROKERAGE / DEVELOPMENT / MANAGEMENT / INVESTMENT

# Meet the Team: Marketing

## **Annemarie Price** – Marketing Coordinator (Graphic Designer & Production / 100% Graphic Design)

- Design and Production of all Pitchbooks / Owner Presentations, Flyers, OMs, and other Belvoir Marketing materials (all design work in Adobe Creative Suite unless otherwise requested)
- Creating new templates for pitchbooks, flyers, OMs, etc.
- Graphic Design / Content creation for Social Media Graphics: LinkedIn, Instagram, Facebook

## **Caylin Hicks** – Marketing Specialist (Digital Marketing Specialist/100% Listing Management)

### **Inventory Management:**

- Tracking all Marketing Requests (Pitchbooks, OMs, and Flyers) in Microsoft Teams / Property Marketing Tracker
- Auditing all requests for completion and following up with appropriate party (broker or client) for missing data
- Once all data necessary has been collected, updating the property with an “effective date” for production
- Once materials are approved by both Broker and Client, uploading content to CoStar/Loopnet and Belvoir.net
- Weekly auditing of all online inventory, working with Brokers and (if applicable) their support staff to ensure all listings stay up to date

### **Social Media:**

- Creating a fresh content calendar each quarter for LinkedIn, Instagram and Facebook. Coordinating with Annemarie to collect appropriate graphics and executing
- Featured Listings of property, branding, etc.

### **Other Digital Marketing:**

- Working with Nate’s eblast schedule to ensure all new listings are e-blasted and content is timely
- Working with website / blog writer to ensure featured properties are highlighted on Belvoir.net / blog



# Meet the Team: Brokerage Support

## **Nate Han** – Transaction Manager (Broker Onboarding)

- New Broker Onboarding: Salesforce Training, Comps / GIS / ESRO Training
- CRM Maintenance and updates
- Eblast scheduling, design and deployment

Main Role: Market Intelligence, Contracts, agreements, and vouchers with a strong focus on development of technical applications in CRM and Pardot



## **Brad Smith** – Sr. Financial Analyst ( Subject Matter Expert / Broker Support on an As Needed Basis)

- Subject Matter Expert / Editor of Marketing collateral as needed
- Running Proformas when needed
- Strategic and business writing when needed

Main Role: Financial Analytics, modeling, underwriting, and cost analysis. Major focus on BGP / Investment side of Belvoir

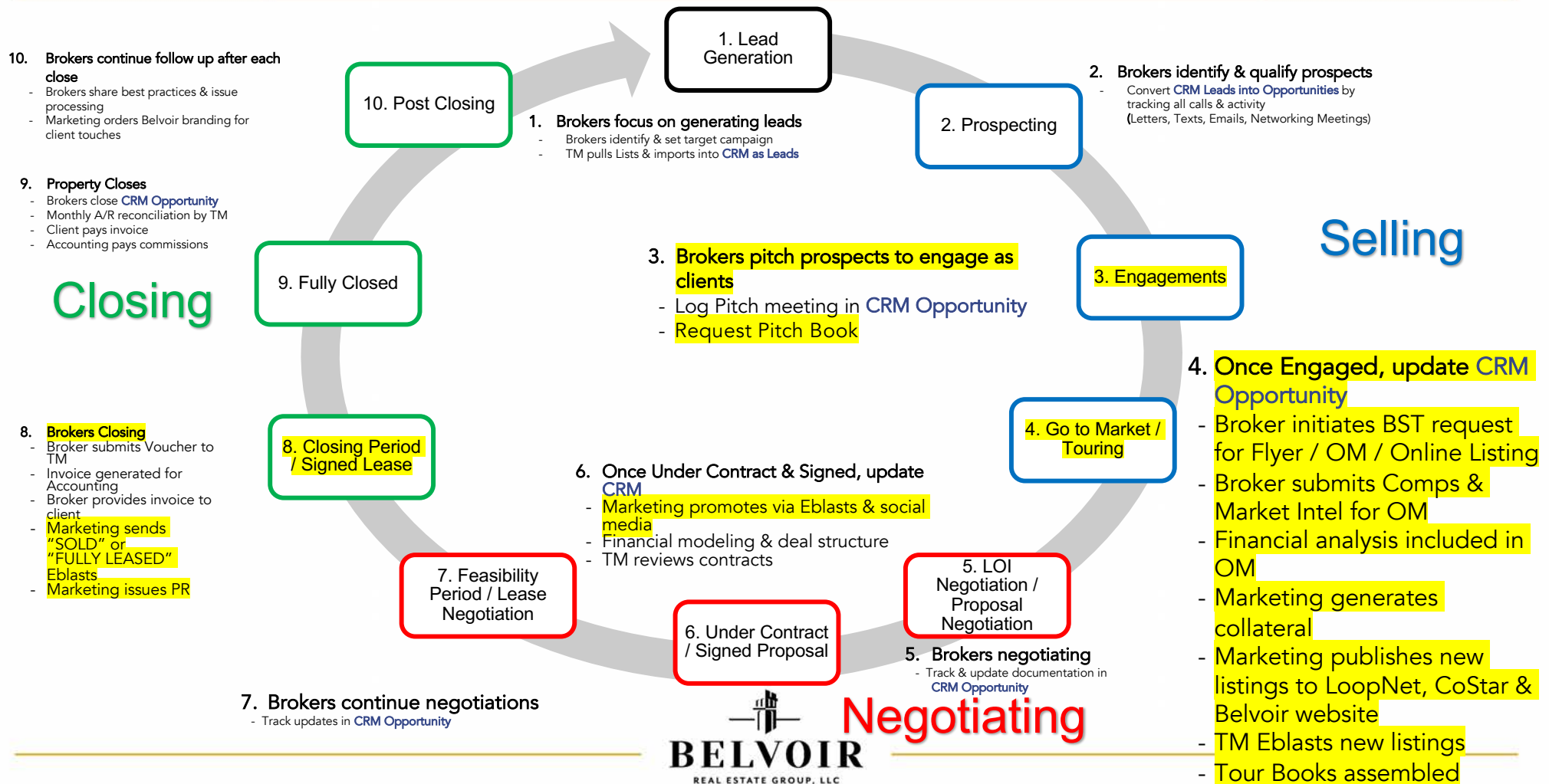


## **Varun Rajan** – International Advisor (Marketing Request & Listing Support (Kyle & Nick ONLY))

- Salesforce - Ensuring all accounts for Kyle & Nick are accurate and up to date
- Submitting requests and supporting materials for Pitchbooks / Owner Presentations
- Submitting requests and supporting materials for New Property listings, flyers, OMs and any other marketing materials (scheduling Drone / Photography, any additional signage, etc.)



# Sales Life Cycle



# Go To Market



Initial Client Meeting Scheduled to understand Client needs (which will inform Pitch Book content)



Request for Pitch Book / Owner Presentation (including financial information like BPO and comps)



Signed Engagement / Listing Agreement Received (with minimum of 90-day exclusivity)



Information request submitted to seller & New Listing Request sent to Marketing



Approved Materials are sent to Print (and if applicable posted on CoStar / Loopnet / Belvoir.net)



Marketing promotes listing and property through E-Blasts, Digital Listing maintenance, Social Media, and other appropriate efforts

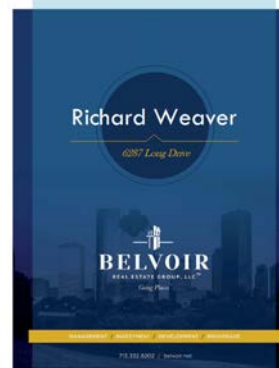


Closed / Sale: Marketing Promotes Listing Closure with Eblasts, Press Release and updated Broker Experience resume & Listing Status Sheets

← Ideal Process from Engagement to Marketing Launch →

# Marketing Materials

- Pitch Books / Owner Presentations
- Broker Relevant Experience / Resumes\*
- Broker Listing Status Flyers
- Property Flyers
- Expanded Property Flyers\*
- Property Offering Memorandums
- Tour Books\*
- Digital: E-Blasts, Social Media Graphics, Web Graphics, Belvoir.net
- Property Management Collateral (Brochures, Lease Listings, etc.)
- Press Releases\*
- Generic Belvoir Branded Marketing Materials (including Glossy)



INDUSTRY DEVELOPMENT IMMIGRATION INVESTMENT

### Execute Your Commercial Real Estate Goals.

What defines your company? The right sized space? A second location? A second location? Taking the leap from lease to purchase and build-to-suit? No matter your goals, choose to work with one of the top commercial real estate companies. At Belvoir Real Estate Group, our commercial real estate brokers understand your needs, manage everything, offer you the best, and let our team of real estate experts provide your company the insight and assistance it takes to make your commercial real estate goals a reality.

As a trusted commercial real estate company, Belvoir is dedicated to putting together custom research, not off-the-shelf.

From the identification to professionals after successful #1 Belvoir commercial real estate team getting started.

<b>UNDER CONTRACT</b> 2303 Lyons Ave   Houston, Tx 77020 Whitehaven Houston Multipurpose site 6.89 Acres	<b>SOLD</b> 5645 Norddale St   Houston, Tx 1.3 miles from 410 Loop Industrial with Office 16,100 SF	<b>SOLD</b> 408 Jensen Dr   Houston, Tx Located near East River Project off of 49 & 110 For Sale & Lease +/- 13,000 Bldg SF
<b>FOR SALE</b> 474 Hwy 6 South   Houston, Tx Located in Opportunity Zone Development Opportunity 2.47 Acres	<b>FOR SALE</b> 979 Drennon Rd   Courten, Tx Built-to-suit industrial 0.5 miles from 145 Investment Sale 6.95 Acres	<b>PURCHASED</b> 7119 Kindred St   Houston, Tx Will be used as a distribution center Procurement Representative +/- 8,500 SF

SENIOR ASSOCIATE  
 Mike Fischer  
 15335 Park Ten Place St 150 Houston, TX 77024 | mfisher@belvoir.net | (713) 332-0215 |  
 The commercial real estate #1 in the world.

# Marketing Request Forms: BelvoirMarketing.WuFoo.com

One central, online location for all marketing requests including:

- Pitch Books / Owner Presentations
- Offering Memorandums
- Flyers & Expanded Flyers
- Broker Relevant Experience / Resume Request
- Broker Listing Status Request
- Any other graphic design or marketing material needed

Request Form Category	Entries Today	Total Entries
New Property Listing Request Copy PUBLIC 0 Created: 12/02/2020   Modified: 12/02/2020	0	0
Pitch Book / Owner Presentation Request Form PUBLIC 0 Created: 12/02/2020   Modified: 12/02/2020	0	0
Miscellaneous Marketing Request Form PUBLIC 0 Created: 12/02/2020   Modified: 12/02/2020	1	1

# Marketing Request Forms: BelvoirMarketing.WuFoo.com

Forms include fields to answer all listing / client / marketing related questions as well as upload:

- Financial information such as BPOs
- Leasing Comparable
- Relevant Experience
- Photography

Once submitted, forms go to BST@Belvoir.net automatically, but also get stored in Wufoo's cloud for easy reporting

Project	Address	Broker	Form Completed	Marketing	Seller Info	Client Contact Info	Form Submitted	Effective Date	Deadline Date	Collateral Type
Portfolio Sale	123 Main St	BJS	Yes	On Market	Yes	Yes	1/1/2021	1/1/2021	1/15/2021	Flyer & OM
Lathrop & Black Gold		MTG		On Market						Flyer & OM
851 N FM 3803 RD E	Conroe, TX 77303	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
3125 N Main	Baytown, TX 77521	SH	Yes	On Market			11/20/2020	11/20/2020	11/20/2020	
Denmark (Investment)	12777 Jones Road Houston, TX 77070	MTG	NA	NA	NA	NA				
5381 W 42nd Street	Odessa, TX 79764	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
11633 Spring Cypress	Tomball, TX 77377	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
23540 Coons Road	Tomball, TX 77375	NS	Yes	On Market	Yes	Yes	11/9/2020	11/9/2020	11/30/2020	
6206 Bayway Drive	Baytown, TX 77520	SH	Yes	On Market		Shahriar Khan	11/19/2020	11/20/2020	11/20/2020	OM
19920-19960 N Hwy 242	Conroe, TX 77306	DS					10/13/2020			
10611 Palestine	Houston, TX 77029	DS					11/30/2020	11/30/2020	11/30/2020	
6910 Sterns Street	Houston, TX 77021	GC					11/30/2020	11/30/2020	11/30/2020	
18700 Hwy 59	New Caney, TX 77357	DS					12/1/2020			
2350 Security Forest Drive	Conroe, TX 77306	DS					12/1/2020			
19711 Aldine Westfield Road	Humble, TX 77338	NS	Yes	On Market	Yes	Yes	12/3/2020	12/3/2020		
6827 Long Drive	Houston, TX 77087	GC					12/1/2020	12/1/2020	12/3/2020	Pitch Book

### New Property Listing Request

Please fill out this form for any and all new property marketing material/listing requests (both on and off-market)

**Client Name \***

First Last

**Client email \***

**Client Phone Number \***

-  -

### ### ####

**New Listing Address**

**Type of Collateral Needed \***

Flyer

**Other Materials Needed \***

Point of Interest Map

Signage: Single Sided

Signage: Double Sided

Instagram & Facebook Campaign

Linked in Campaign

Other (specify below)

**Photography (Located in R:\3-Marketing) \***

Drone (to be paid by broker)



# Marketing Request Process



Pitch Book /  
New Listing /  
Misc. Request  
form comes in  
through  
WuFoo



Request is input  
into BST  
Microsoft Teams  
Project Tracker  
to go into  
Marketing Que



(If Applicable)  
Any missing  
materials are  
tracked down by  
BST and request  
is given an  
"effective date"



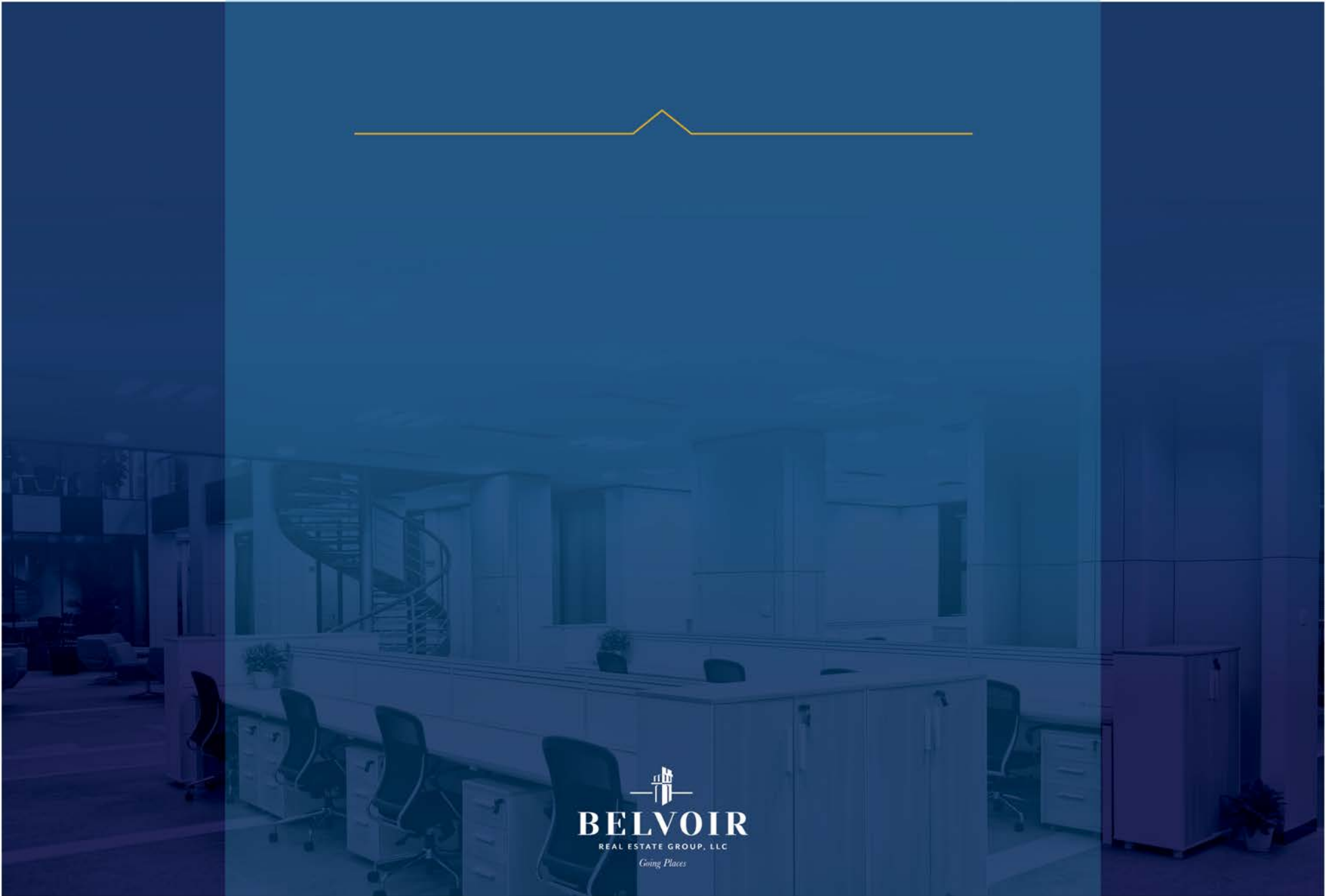
Marketing  
Materials are  
sent to Broker  
first (and if  
applicable  
then to client)  
for final  
approval



Approved  
Materials are  
sent to Print and  
(and if applicable  
posted on  
CoStar / Loopnet  
/ Belvoir.net)



**Listing  
Maintenance**  
A weekly report of all  
listings is pulled for  
accuracy and updates  
with the BST partnering  
with Brokers to ensure  
any changes are made  
to digital listings and  
marketing materials



  
**BELVOIR**  
REAL ESTATE GROUP, LLC  
*Going Places*