



PROPOSAL KIT SAMPLE

Real Estate Occupancy Sample Proposal

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David Phillips
Owner/CEO
Fantasy Investment Property Management
75550 Ave 43
Bermuda Dunes, CA 92201

Mr. Phillips,

I have prepared this proposal for you with the knowledge that your company Fantasy Investment Property Management will be taking ownership of the property StoneGate at TownGate in Moreno Valley, CA.

A current top sales leasing consultant, Jenny Fabian, who is also a partner with Chaic Enterprise, has revealed your concerns regarding occupancy and retention issues at the StoneGate property. Chaic Enterprise would like to partner with your company to integrate a property theme that will not only meet the goals of occupancy and retention, but will also build a brand identity of a Fantasy Investment Property Management owned property. We have already completed an extensive research regarding the feasibility of the project and are looking forward to discussing this further with you on how we can meet your needs.

I will be your primary contact throughout the life cycle of the project. Please review the proposed concept of the project.

Sincerely,

Luchano Jones
Project Manager
Chaic Enterprise
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PROJECT

Increasing Unit Occupancy & Retention

Prepared for: David Phillips
Owner/CEO

Prepared by: Luchano Jones
Project Manager





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EXECUTIVE SUMMARY

The Objective...

Client is looking to implement a new marketing strategy to increase unit rentals and retention of current tenants at the property StoneGate at TownGate Bermuda Dunes, CA.

- 🏠 Need #1: Develop an innovative marketing plan.
- 🏠 Need #2: Maintain the current tenant level.
- 🏠 Need #3: Reduce inventory of units & expand the current tenant population.
- 🏠 Need #4: Develop cash flow streams.

The Opportunity...

StoneGate at TownGate has a unique opportunity to utilize current resources to improve the properties' present and future occupants living lifestyle, by implementing onsite activities. The proposed project will reduce attrition rate & inventory of units, while expanding the occupancy rate, resulting in achieving the company's goals.

- 🏠 Goal #1: Expand the current customer base and increase market share by increasing public awareness through a cutting edge marketing schema.
- 🏠 Goal #2: Use current & acquired resources to implement a major project that will increase satisfaction of current and future occupants.
- 🏠 Goal #3: Build property loyalty and value added awareness with the new processes implemented.

The Solution...

Design a wellness program on the property with the launch of new marketing strategy that will build property awareness in Riverside County.

- 🏠 Recommendation #1: Implement a project covering all aspects of total wellness for adults and adolescents residing on the property.
- 🏠 Recommendation #2: Redesign & implement a marketing strategy based on the project's objective. Consider future implementation on all corporate owned properties.





NEEDS ASSESSMENT

Chaic Enterprise has identified the following needs which are not being met.

- 🏠 Owner would like to reduce inventory of rental units at StoneGate at TownGate property and increase ROI.
- 🏠 Residents at property need recreation activities produced at the property.

Background:

The property StoneGate at TownGate has 552 Units and onsite world class amenities. The property faces severe competition with current and new property development with similar world class features. StoneGate at TownGate will need to distinguish itself in the market and utilize its' strengths and opportunities to gain a competitive advantage.

Chaic Enterprise has performed a preliminary diagnostic of the property StoneGate at TownGate and has proactively developed a comprehensive solution to address the needs of the primary stakeholder Fantasy Investment Property Management, while meeting the needs of the owner's clients/residents. Chaic Enterprise integrates a total quality management solution in its projects. The project team consists of industry experts with combine experiences of over 20 years in the wellness industry with substantial support by IT, PR, HR, and BA specialist. Chaic Enterprise project team understands the needs of the owner and is prepared to implement results driven improvements.

Needs Identified:

- 🏠 Comprehensive wellness programs on the property for adults and adolescents.
- 🏠 Increase revenue & maintaining occupancy level at 100%.
- 🏠 Identify property value streams with the possibility to generate more revenue.

Demographics:

- 🏠 Professionals with a household income of at least 60k.
- 🏠 Professionals seeking an activity based living lifestyle.

Solution:

- 🏠 Implement a total wellness program on the property designed to build quality of life.
- 🏠 Develop new marketing strategy and property theme that will simultaneously build property brand awareness and demonstrate the value of what the property has to offer the residents.
- 🏠 Create profitable revenue streams through other opportunities identified.





SWOT ANALYSIS

A preliminary SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis of StoneGate at TownGate property in Bermuda Dunes highlights the following strengths and opportunities that can be further leveraged or exploited, as well as pointing out weaknesses and threats to be managed.

Strengths:

- 🏠 Property has over five hundred & fifty units.
- 🏠 Property offers diverse floor plans viewable online.
- 🏠 Property is less than two years old & still appears new.
- 🏠 Property's proximity is close to shopping malls, grocery stores and restaurants.
- 🏠 Property offers doubled the amenities and security protection.
- 🏠 Property is viewable on a well traveled intersection.
- 🏠 Property is spacious, allowing car parking, sidewalks and lawns.
- 🏠 Property front office is fully staffed and is friendly in nature.

Weaknesses:

- 🏠 Property has only 65% of units occupied despite being in operation over 12 months.
- 🏠 Property is paying to maintain empty units and amenities.
- 🏠 Property marketing channels (typical internet site/flyers/brochure) are outdated & unappealing.
- 🏠 Property amenities are not innovative and equates to other competitor's offering.
- 🏠 Most of the leasing consultants lack "Value" selling ability.
- 🏠 Property residents do not know the management at a personal level.
- 🏠 Property does not create interaction with residents through activities.
- 🏠 Property has lack luster marketing plan in place (Get ½ off, one month free, etc).
- 🏠 Property does not take advantage of its location, size and amenities.
- 🏠 Property hygiene in some buildings (particularly staircases) needs attention.
- 🏠 Property has no retention plan in place.
- 🏠 Property responds to competitors in a reactive nature versus a proactive nature.



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