

# Sample Business Proposals



## Real Estate Occupancy Sample Proposal

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## Increasing Unit Occupancy & Retention

**Prepared for:** David Phillips  
Owner/CEO

**Prepared by:** Luchano Jones  
Project Manager



Attached is our proposal for the project and other identified opportunities for your property STONEGATE AT TOWNGATE, 12640 Moreno Valley, CA 92553. Our cost estimates are based on a Preliminary Property Diagnostics and Needs Analysis performed for the implementation by Chaic Enterprise.

The objective is to integrate a wellness program with the adoption of a new gated community rebranding campaign.

Proposal Number: 05-01-1971

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

Dear Mr. David 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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# 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 Moreno Valley, 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.
- ◆ **Goal #4:** Increase & maintain cash flow resulting from rental of all 552 units with a control process in place.

## 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.



# S A M P L E

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