

“PACKAGING” YOUR CLIENT’S CANDIDACY

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Definition: Wrapping the client’s qualifications in an attractive, well thought out, professional presentation piece which gives its recipient the finest possible first impression as to the desirability of the candidate for the purpose intended.

Essentials: The presentation piece (a.k.a. “information package”, “mini-business plan”, “Overview & Expansion Plan”, etc.) must address those questions in the recipient’s mind in such a way as to promote a high comfort level and even a strong desire to help the candidate achieve its stated objectives.

Every situation can be reduced to answering the age-old questions of:

WHO?	WHEN?
WHAT?	HOW?
WHERE?	WHY?

Example: Client desires to develop a SUPER VOLUME, HIGH CASHFLOW, N.T.I. (new to industry), 2 PARTY MULTI-PHASE MARKETING SYSTEM from scratch featuring automotive fuel sales and several other profit centers which can include one or more of the following:

- Diesel Fuel
- Propane Fuel
- Car Wash
- Quick Lube
- Quick Smog Test
- Quick Brake Service
- Drive-Thru lane(s)
- C-Store w / inserts, including:
 - ✓ QSRs (quick svc. restaurants)
 - ✓ Financial services
 - ✓ Dry cleaning
 - ✓ Laundromat
 - ✓ Wire transfer services
 - ✓ Customer seating

Likely

Recipients: Since real estate developments involve many different decision makers who will be able to “help” or “hurt” your client’s chances of succeeding, each recipient must be studied to determine, in advance, what questions are likely to be in their mind. Once this is known, you are in a good position to assemble all the “right answers” to these questions and to document them in the client’s

presentation piece beforehand so the recipient's reaction is what you want it to be.

Likely recipients will include:

- SELLER / LESSOR who now controls the land desired.
- BANKER / LENDER / INVESTOR who possesses the funding you need.
- FUELS SUPPLIERS who have the brands you prefer.
- EXPERT ADVISORS you need to help get the job done.
- CITY OFFICIALS with the power to approve the use intended for the site.
- FRANCHISORS who have the QSR concepts you want.
- BUILDER who will construct the improvements you need.

Documentation 1. Proof of your experience qualifications:

To Include:

- Previous developments done.
 - Current operations you control/own.
 - Years spent in this business / biosketch showing this.
 - Noted accomplishments setting you apart from others.
 - Expert advisors on your advisory team.
 - Experience of partner(s), operating affiliate(s).
 - Letters of commendation, awards received.
2. Proof of your financial qualifications.
- Capital required for project broken down in detail.
 - How these requirements will be funded.
 - Debt to be carried / amount of debt service monthly.
 - Financial statement.
 - Bank officer letter(s) verifying funds in hand.
 - Bank letter offering to loan you needed debt capital.
 - Income statement(s) from existing operation(s).
3. Proforma projecting cashflow of business planned.
- Good / Better / Best results scenarios.
 - Line-by-line portrayal is best.
 - Monthly format is preferred showing ramp-up during year # 1.
 - Full year format should reflect years # 1 through # 4.

4. Written site criteria.
5. Prototype site plan / Layout of facilities.
6. Prototype list of services you plan to offer.
7. Overview of your company.
8. Company Mission Statement.
9. “Story” explaining industry.....show where you fit.
10. News articles / other evidence documenting it’s a good business.
11. Something showing the future business outlook is bright.
12. Competitive activities shown / mistakes they make, if any.
13. Biosketch or descriptive paragraph highlighting the experience qualifications of Advisory Team Members.
 - R.E. Consultant
 - OPERS Consultant
 - C-Store Consultant
 - Fast Food Consultant
 - Car Wash Consultant
 - Attorneys (3)
 - Architect
 - Marketing Consultant
 - Design Firm
 - CPA
 - Banker(s)
 - Partners / Investors.
14. Major Oil Company endorsement letters.
15. Major Oil Company branding proposals.

Appendix Items:

1. Personal financial statement.
2. Lease application.
3. Company financial statements / operating results.
4. Articles of Organization (LLC, Corp., Partnership, etc.).
5. References (personal, trade, other).
6. Recognition / Awards.
7. Community service acknowledgements.
8. Publicity (photos, newsprint, etc.).

Color Photos: Use lots and lots of color photos, drawings, exhibits, etc.

Form: Electronic preferred. If hard copy, use spiral bound, clear cover over custom-designed cover sheet (facing page) with black vinyl

backing and black binding. Use section tabs, section title pages, table of contents page(s). Have large print, lots of spacing. Entire package should appear neat, clear, easy to read / understand. Tabs s/b flush, not extended beyond edge of page.

Executive Summary:

Optional! Most clients prefer (and I recommend) that the first section of the presentation piece be an “Executive Summary” which briefly answers the WHO / WHAT / WHERE / WHEN / HOW / WHY questions as to what this is all about.

~~~~ **ATTENTION** ~~~~

*The foregoing addresses a complicated, business situation. However, the ‘process’ employed applies in a greater or lesser manner to many other situations. Examples of these may include:*

- 1. Parents attempting to get their child accepted by an exclusive, highly-regarded, private elementary or secondary school;*
- 2. High school graduates attempting to gain acceptance by a prestigious, nationally-recognized, top university;*
- 3. Grad students seeking acceptance by a much sought after graduate studies program;*
- 4. Persons applying for high paying positions of employment within established, top-rated organizations;*
- 5. Organizations applying for substantial amounts of government grant money;*
- 6. Entities desiring to improve or protect their public image;*
- 7. Organizations trying to improve or protect their police relations stance;*
- 8. Politicians running for public office who want your vote; and*
- 9. Judges as well as other political appointees seeking confirmation by the U. S. Senate.*