



Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

# The Strategic Real Estate Diagnostic™

Indicate the degree to which you agree or disagree with the statements below.

|  | DISAGREE                            | NEUTRAL | AGREE |
|--|-------------------------------------|---------|-------|
| 1. The manner in which we make and manage real estate decisions supports and advances our business strategy.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 2. The decisions we've made about our company's real estate have a direct impact on our ability to deliver our value proposition, and run the business effectively.        | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 3. I realize that real estate is one of the largest controllable expenses impacting businesses and we effectively manage that expense.                                     | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 4. I'm confident that our business is fully utilizing real estate strategies and tactics, whether we rent or own, that exploit and advance our wealth creation objectives. | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 5. I understand the tax implications, and opportunities associated with real estate, whether I lease or own, and I'm confident that we're taking full advantage of them.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 6. I am confident that our business is effectively utilizing our space to maximize productivity, while reducing costs.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 7. I can adjust my lease quickly to adjust for the rises and falls in my business.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 8. I have a real estate advisor who firmly grasps the intricacies, opportunities and dangers associated with real estate.  | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 9. My real estate advisor proactively provides insights that improve our overall business performance.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |
| 10. Our space provides an advantage to recruit and retain the employees we desire.   | (4) (3) (2) (1) (0) (1) (2) (3) (4) |         |       |

11. As you consider your overall real estate situation, what is the area you are least comfortable with?

**TOTAL:** \_\_\_\_\_

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