

## ANNUAL CHECKLIST

# Corporate portfolio review

- **Review and refresh goals and KPI metrics**
- **Review/adjust short- and long-term business plans, align real estate with business strategy**
  - Client and employee geographic needs
  - Changing role of real estate
  - Future growth or contraction
  - Lease vs. own analysis
  - Divestiture of owned analysis
  - Review technology suite
  - Analyze real estate org chart, models (i.e. outsourcing)
  - Analyze and review processes
  - Annual review of service providers and service levels
  - Review real estate cost center policies
  - Review change management process
  - Review communication protocols and update
  - Assess risk
  - Assess cost savings and/or cost avoidance wins from the year
  - Develop and/or update your Corporate Real Estate Playbook
- **Review workplace design and planning**
  - Assess new ways of working (i.e. activity-based space, co-working, hot desk)
  - To attract and retain workforce talent
  - Review space allocation and density
  - Productivity assessment
  - Wellness assessment
  - Adjust HR policies as needed
- **Leased properties**
  - Review operating and tax for accuracy and action
  - Ensure critical date management and lease administration
  - Identify landlord obligations
  - Review rent costs against current market, renegotiate as applicable
- **Owned properties**
  - Review operating and tax costs for action
  - Sustainability review
  - Assess building condition and needs assessment
  - Review capital reserves and capital projects
  - Assess financing structure and debt
  - Review values and current capital markets