

# 2021 National Account Program

Changes / Updates / Reminders

*Quick reference guide for all the things that you need to know about*

*National Accounts in 2021*



## Overview of information

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- Meet the Team
- Account changes
- Account Reminders

# Our Growing Team

Lauren Kurtzeborn recently joined our National Account team and offices out of STL. She previously managed Westerns fleet through her position as Acct Manager with Enterprise.

## Your Newest National Acct Team



**Crystal Moyer:**  
National Acct  
Director



**Jessica Gitto:**  
National Account  
Manager, East Region



**Lauren Kurtzeborn:**  
National Account  
Manager, West Region



**Matt Wagner:**  
Our Ace in the Hole

Jess and Lauren will help develop new accounts and support existing accounts within their assigned divisions. Matt Wagner provides support to the national account team on various levels but with a specific involvement with RMR and Medxcel.



## NATIONAL DIVIDE

Lauren: West Coast  
Mike Mercier's Branches

Jess: East Coast  
Bill Hohmeiers Branches

GOS / Divisional Acct  
Growth



# Account Cuts

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- We will not prioritize accounts that have not shown to be strong partners
- Less accounts allows for an increased focus with the “Owner Occupied” segments
- All existing MSAs / COIs are still applicable, we are simply no longer working on developing

## Accounts to be cut:

- Brookfield Retail (MSA)
- Transwestern (MSA)
- Hines (MSA)
- JLL (NO MSA)

# 2021 Account Listing

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Account	Assignment	MSA
<b>Ascension (Medxcel)</b>	<b>Matt Wagner / Crystal</b>	Yes
<b>CBRE / Property Management</b>	<b>Crystal</b>	Yes
Property Management Support: West	Lauren	
Property Management Support: East	Jess	
<b>CBRE / Global Workplace Solutions</b>	<b>Crystal</b>	Working
GWS Support: West	Lauren	
GWS Support: East	Jess	
<b>Cushman / Asset Services</b>	<b>Crystal</b>	Yes
Asset Services Support: West	Lauren	
Asset Services Support: East	Jess	
<b>Cushman / Global Occupier Services</b>	<b>Crystal</b>	Yes
GOS Support: West	Lauren	
GOS Support: East	Jess	
<b>Lillibridge - Ventas</b>	<b>Lauren</b>	Yes
<b>Physicians Realty Trust</b>	<b>Jess</b>	Yes
<b>RMR</b>	<b>Crystal / Matt Wagner</b>	Yes

# Account Reminders

**Cushman & Wakefield:**

<b>Asset Services</b>	Tenants occupy the building
<b>GOS (Global Occupier Services)</b>	Owners occupy the building

- Established MSAs for both Asset Services and GOS
- C&W employees can locate us on their internal site "The ReSource Site"
- EXTREMELY STRONG PROCUREMENT SUPPORT

Established "VPD" Agreement

- Based on quarterly **PAYMENTS** to Western –NOT SALES
- Resets every quarter!
- Paid out of home office and allocated to the respective branches

<u>VPD Agreement</u>		
Quarterly Payments to Western REVENUE		VPD CW to Invoice %
\$ -	\$ 875,000	0.5 %
\$ 875,001	\$ 2,000,000	1%
\$ 2,000,001	\$ 4,000,000	2%
\$ 4,000,001	\$ 6,000,000	3%
\$ 6,000,001	and above	4%

**DO NOT FORGET!!!!** Please update your National Acct team of large opportunities!  
C&W leadership will reach out to their local folks and help endorse you.

## CUSHMAN GOS ACCOUNTS

- A listing of all Cushman GOS accounts has been provided to your BDs
- We prioritize outreach to these accounts based on your feedback
- A list of accounts currently being prospected is below. However, this list of subject to change depending on responsiveness

<b>Jessica: GOS Accounts</b>	<b>Able to make regional intros</b>	<b>Addendums / COI complete</b>
Ameriprise		
Cummins		
Ericsson		
MetLife		Yes
MITRE	Yes	Yes
UBS		
Vanguard		
<b>Lauren: GOS Accounts</b>	<b>Able to make regional intros</b>	<b>Addendums / COI complete</b>
Citi	Yes	Yes
Avaya		
Essendant		
McAfee		
Bank of the West		Yes
ComCast		
Adobe		
Humana	Yes	Yes
Kimberly Clark		

Please review list of GOS accounts again with your BD and let National Accounts know which of the opportunities are of most value to you and your team.



\*Note that Pinnacle Living is one of Cushman’s most recent acquisitions. Pinnacle was the largest multifamily management company in the United States. They will eventually be rebranded and merged into the Asset Services sector of Cushman. We have strong contacts for this division and can help with introductions wherever needed.

Pinnacle properties can be found here: <https://www.pinnacleliving.com/communities>



## **CBRE:**

<b>Property Management</b>	Tenants occupy the building
<b>GWS (Global Workplace Solutions)</b>	Owners occupy the building

- Established MSAs with Property Management Only
- Working towards establishing GWS agreement
- Available internally on “Vendor Café”

Discount requirement for preferred vendors:

- Western to provide a discount of 1.5% off each final contract amount
- Example below:

<u>DISCOUNT EXAMPLE</u>		
TOTAL Price	\$	365,789.00
Less CBRE partnership discount (1.5%)	\$	(5,486.84)
FINAL TOTAL	\$	360,302.16

*Partnership discount ONLY applies to Property Management – not GWS*

## **RMR:**

Process below applies to all projects outside of the capital list that is provided to you from Matt and/or Crystal

### **Projects under \$10k:**

- The decisions are at the discretion of local management
- They do not have to take out to bid
- They are encouraged to use a strategic sourcing partner but not required
- We have a standardized service order and blanket insurance

### **Projects over \$10k and under \$150k:**

- Local Management can award to the contractor of their choice but if they utilize our MSA, they are NOT required to take it out to bid
- If the choose not to use the MSA, three bids are required

### **Projects over \$150k:**

- Three bids required, strategic partners should be invited to bid



## Don't forget!

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1. The earlier you update National Accounts of large project opportunities, the more leverage we will have
2. We welcome input regarding preferred accounts and any other ideas
3. Building local relationships will provide you the most value
4. Let us know if you need assistance with an introduction, we are happy to help
5. Utilize your BD team, we keep them continually updated
6. All MSAs and COIs are available in Salesforce, attached to the applicable account

Looking forward to a great 2021!

Thank you for all your support!

Do not hesitate to reach out if there is anything, we can do to assist you!

