

POSITIONING YOUR BUSINESS FOR **EXPANSION**

EXPERT GUIDANCE AND ADVICE ABOUT
site selection | financing | design | construction

SESSION ONE

Why Plan Now?
Building Your Team
The “Right” Location
Real Estate Considerations

SESSION TWO

Pre-Design
Financing
Project Costs
Professional Fees



WHY PLAN NOW?

“CEOs, like generals in the heat of battle, are so busy tackling short-term priorities that **the future is obscured by the fog of war.**”

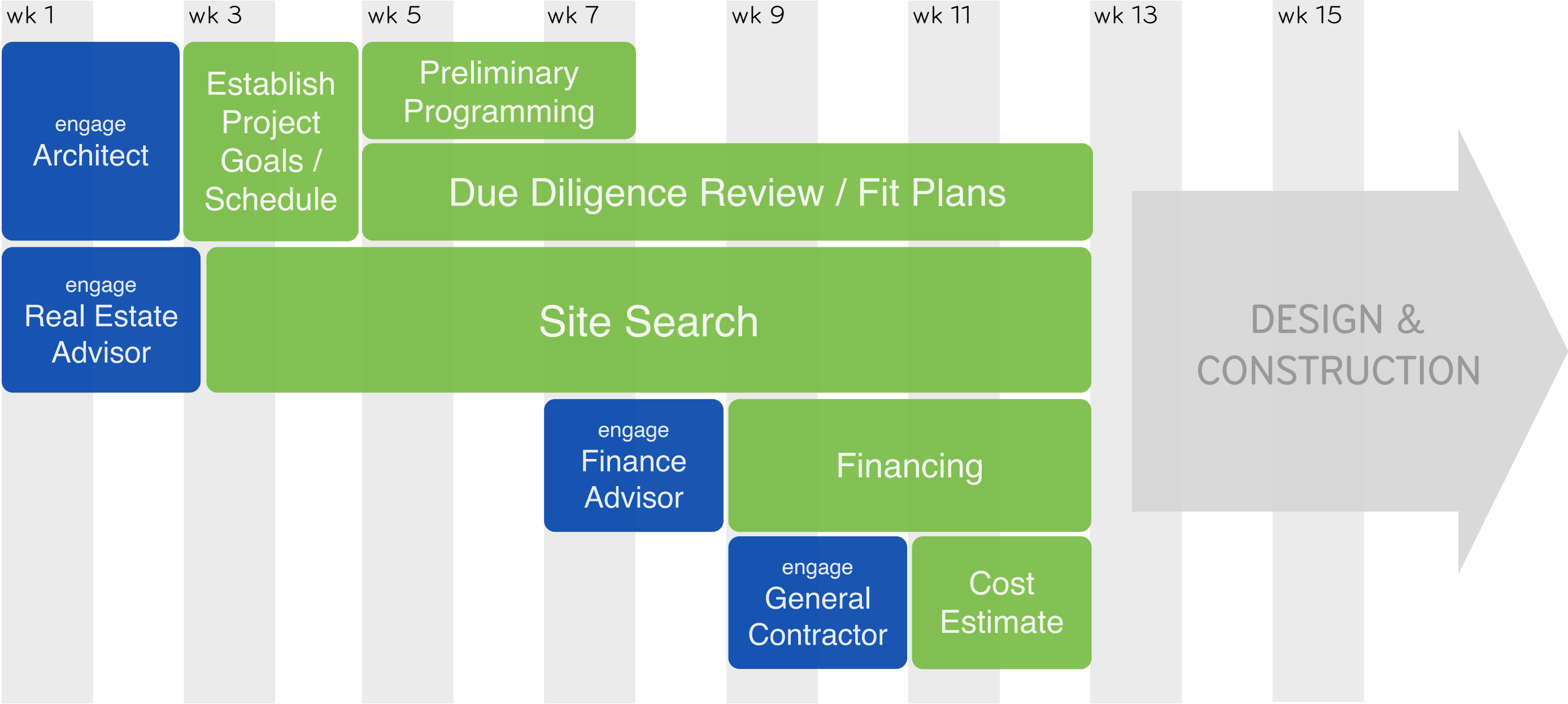
*Roaring Out of Recession
- Harvard Business Review*

“Think of a recession as a sharp curve on an auto racetrack—the best place to pass competitors, but requiring more skill than straightaways. The best drivers apply the brakes just ahead of the curve (**they take out excess costs**), turn hard toward the apex of the curve (**identify the short list of projects that will form the next business model**), and accelerate hard out of the curve (**spend and hire before markets have rebounded**).”

*Beyond the Downturn: Recession Strategies to Take the Lead
- Bain & Company*

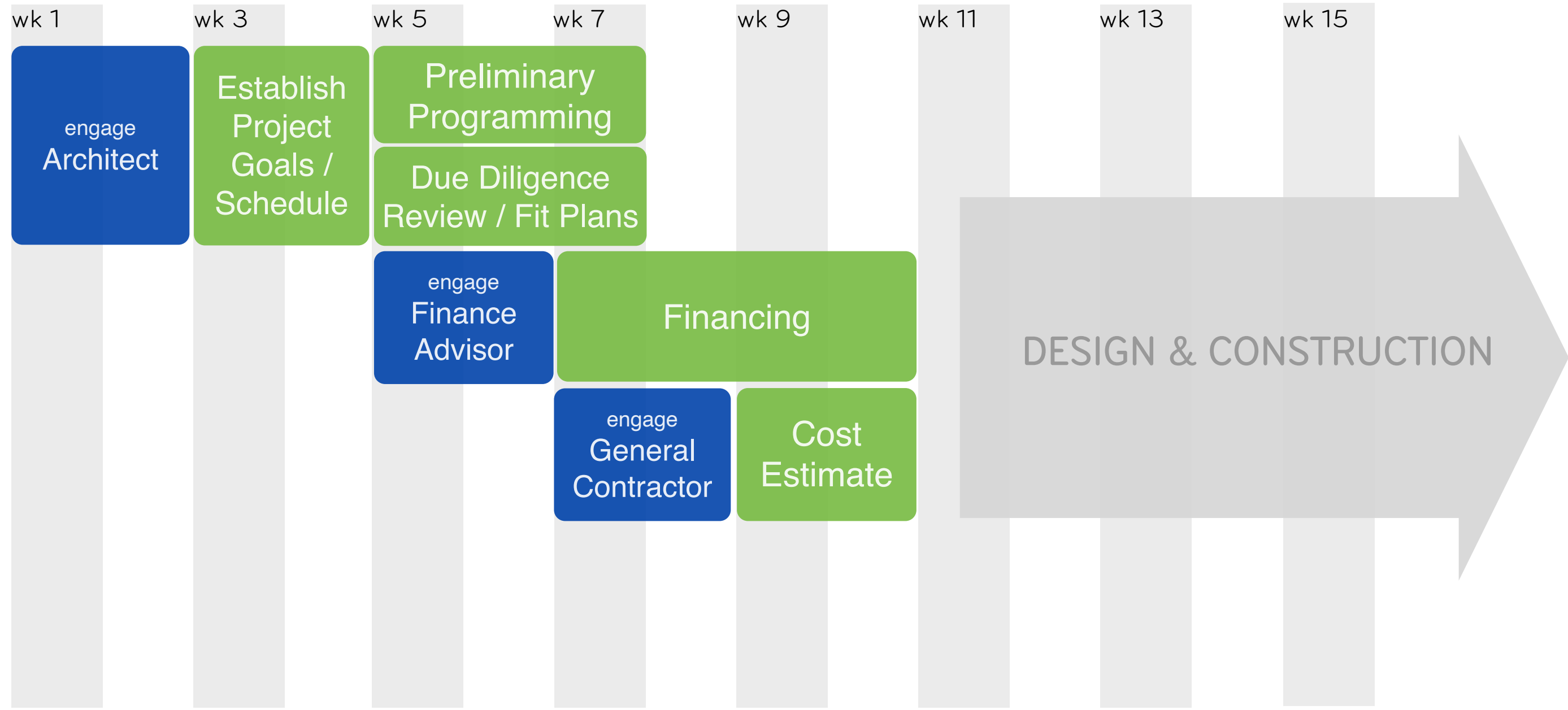
TIME & TALENT

New Site/Building



TIME & TALENT

Remodel/Expansion of Your Existing Building



BUILDING YOUR TEAM

YOU

The vision- and goal-setter

THE ARCHITECT

Your advocate for project design

THE CONTRACTOR

Your advocate for project budget

THE FINANCE ADVISOR

Your advocate for project finance

THE REAL ESTATE ADVISOR

Your advocate for acquisition and approvals

POSITIONING YOUR BUSINESS FOR
EXPANSION

SHELTER
ARCHITECTURE

BETH
CROWELI
THE HIPPI
BANKER

Rhom
CONSTRUCTION

GOLDRIDGE
COMPANIES

BUILDING YOUR TEAM

The Architect



COST APPROACH



POSITIONING YOUR BUSINESS FOR
EXPANSION



BUILDING YOUR TEAM

The Architect

VIBE
DESIGN AESTHETIC
FEE STRUCTURE
COMPREHENSIVE APPROACH
COLLABORATIVE STYLE
TRUST
DESIGN PROCESS
BRAND

POSITIONING YOUR BUSINESS FOR
EXPANSION



BUILDING YOUR TEAM

The Contractor

DEVELOPER
SUB-CONTRACTORS
OWNER
COMMUNICATE
ARCHITECT
COUNTY
STATE
BANKER
CITY

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ARCHITECTURE

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THE HIPPI
BANKER

RHOM
CONSTRUCTION

GOLDRIDGE
COMPANIES

BUILDING YOUR TEAM

The Finance Advisor

RATES
TERMS
COST APPROACH
TREASURY MANAGEMENT TOOLS
FEES

POSITIONING YOUR BUSINESS FOR
EXPANSION



BUILDING YOUR TEAM

The Finance Advisor

APPROVAL LIMITS
CUSTOMER REQUIREMENTS

ANCILLARY SERVICES
OTHER CONSIDERATIONS

THE BANK OR CREDIT UNION
THE LENDER
APPROVAL PROCESS
THE LOAN

POSITIONING YOUR BUSINESS FOR
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SHELTER
ARCHITECTURE

BETH CROWELI
THE HIPPI
BANKER

RHOM
CONSTRUCTION

GOLDRIDGE
COMPANIES

BUILDING YOUR TEAM

The Real Estate Advisor

MUNICIPALITIES
FEE STRUCTURE
MARKET KNOWLEDGE
BUFFER NEGOTIATIONS
LAND USES



POSITIONING YOUR BUSINESS FOR
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THE HIPPI
BANKER

RHOM
CONSTRUCTION

GOLDRIDGE
COMPANIES

LOCATION

The “Right” Stuff

... does it fit and does it fit well?

- Brand Alignment
- History & Perception
- Demographics
- Traffic
- Competition
- Proximity
- Accessibility
- Real Estate Advice

LOCATION

Brand Alignment

... does it feel like you?



EAU CLAIRE

“Your brand - and the demand for that brand - drives your business. We believe your space should do the same.”

- Absolutely everyone who's ever worked at Shelter Architecture



LOCATION

History & Perception

... does it have a story?

BEFORE



POSITIONING YOUR BUSINESS FOR
EXPANSION

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BETH CROWELL
THE HIPPIE
BANKER

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LLC

GOLDRIDGE
COMPANIES

LOCATION

History & Perception

... does it have a story?

AFTER



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LOCATION

Demographics

... does it cater to your customers?



POSITIONING YOUR BUSINESS FOR
EXPANSION



LOCATION

Traffic

... does it encourage discovery?



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LOCATION

Competition

... does it position you well?



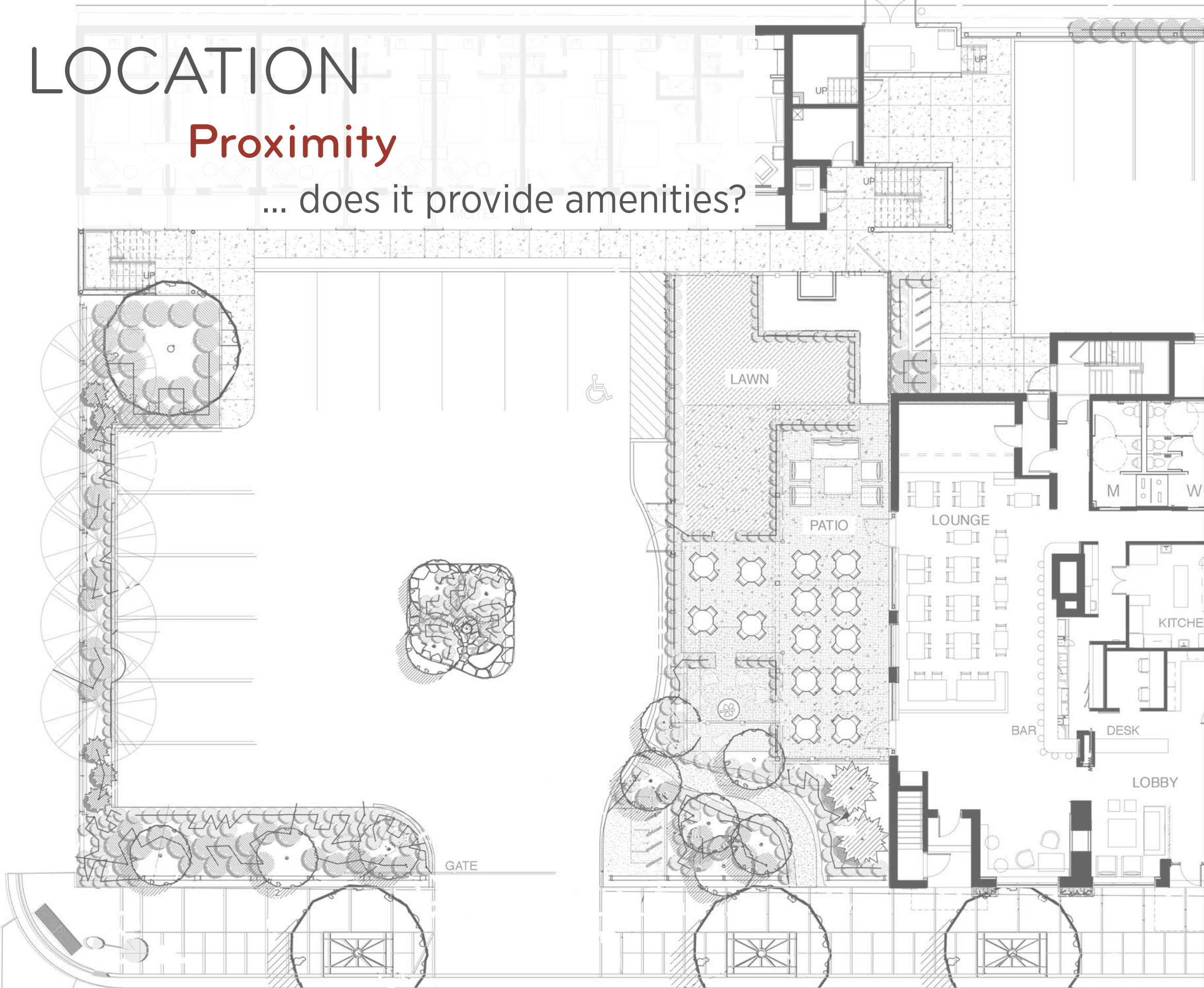
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LOCATION

Proximity

... does it provide amenities?



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LOCATION

Accessibility

... does it offer easy access?



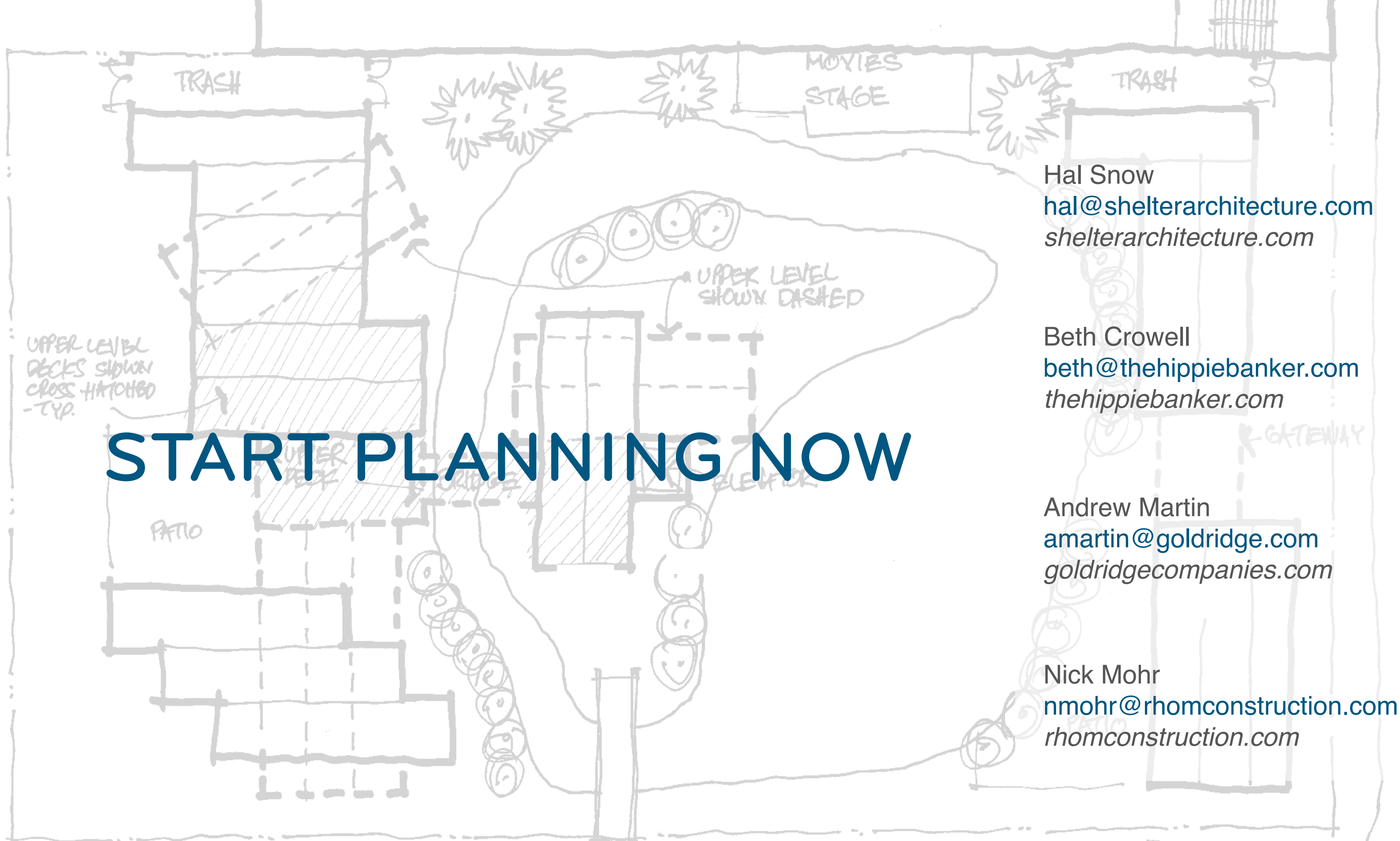
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LOCATION

Real Estate Considerations

- Grade Issues
- Soil Compaction Concerns
- Future Development
- Seller & Listing
- Developer Options
- Local & State Expectations



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START PLANNING NOW