

Occupier Services

what
-
we
-
do



THE TAKEOVER PANEL



& Matthews
Goodman

Occupier Services

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what we do

Occupiers - whether in offices, industrial units, or retail outlets - have been at the centre of our business for over 150 years.

That is why our client workplans usually:

- **Start** - by helping them find premises which meet their strategic, financial, occupation and brand objectives
- **End** - when we help them dispose of an asset on the best terms and with the least liability exposure
- **Continues** - with the commencement of a new search for new property
- **Includes:**
 - Transformation initiatives - such as workplace consultancy and project managing fit-outs
 - Cost saving advice - ensuring Service Charge fees are equitable and validated, Business Rates assessments are correct and Pre-Acquisition surveys help negotiate beneficial acquisition terms and minimise liabilities by identifying repair/replacement costs which could occur over the term of the contract.





acquire & dispose

Whether we are appointed to acquire or dispose of an asset, we start with our clients' goals, their brief and their expectations.

If it is an acquisition instruction, the focus is on factors such as location, the look and feel of the premises, its functionality and, if we have been appointed to dispose of a property, our KPIs include meeting specific deadlines or terms, as well as liability management when exiting a property.

Our skill lies in:

- Leveraging our deep local market knowledge and extensive understanding of sector trends to provide clients with informed advice and opinion
- Proven negotiation skills - to secure the best terms and limit liabilities and risks
- Partner-led teams to ensure that project execution is never compromised and never tardy.

everyone can research the market, but only a few can match our combination of service and profound market intelligence



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maximise flexibility

Your workplace is not just a place to work, or just a shop window for your brand and your corporate culture.

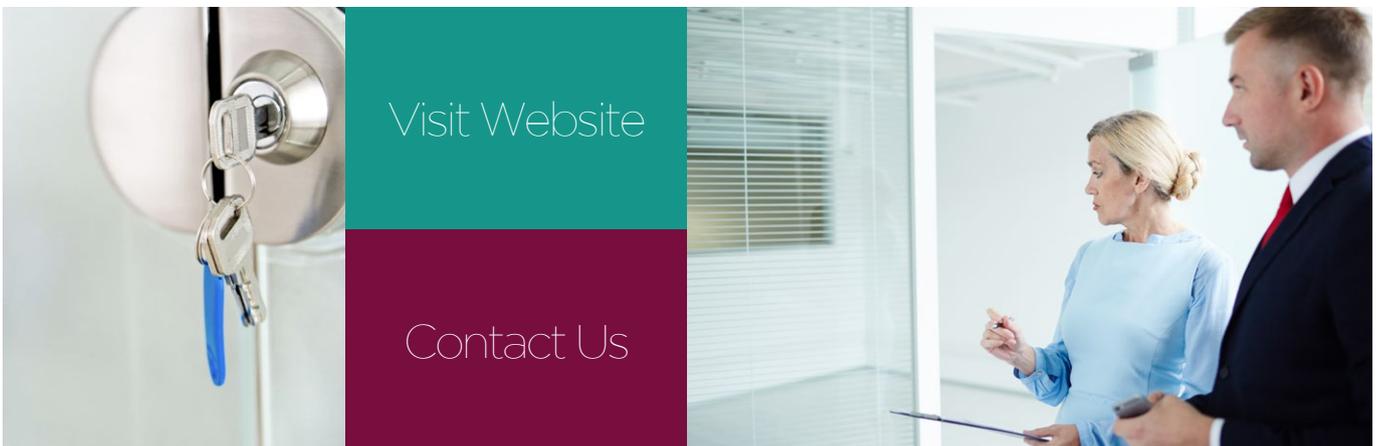
It has to be functional. It has to be dynamic. It has to grow as your business grows and allow you to 'right size' when necessary. That is why the inherent flexibility of your lease is so key to your operation.

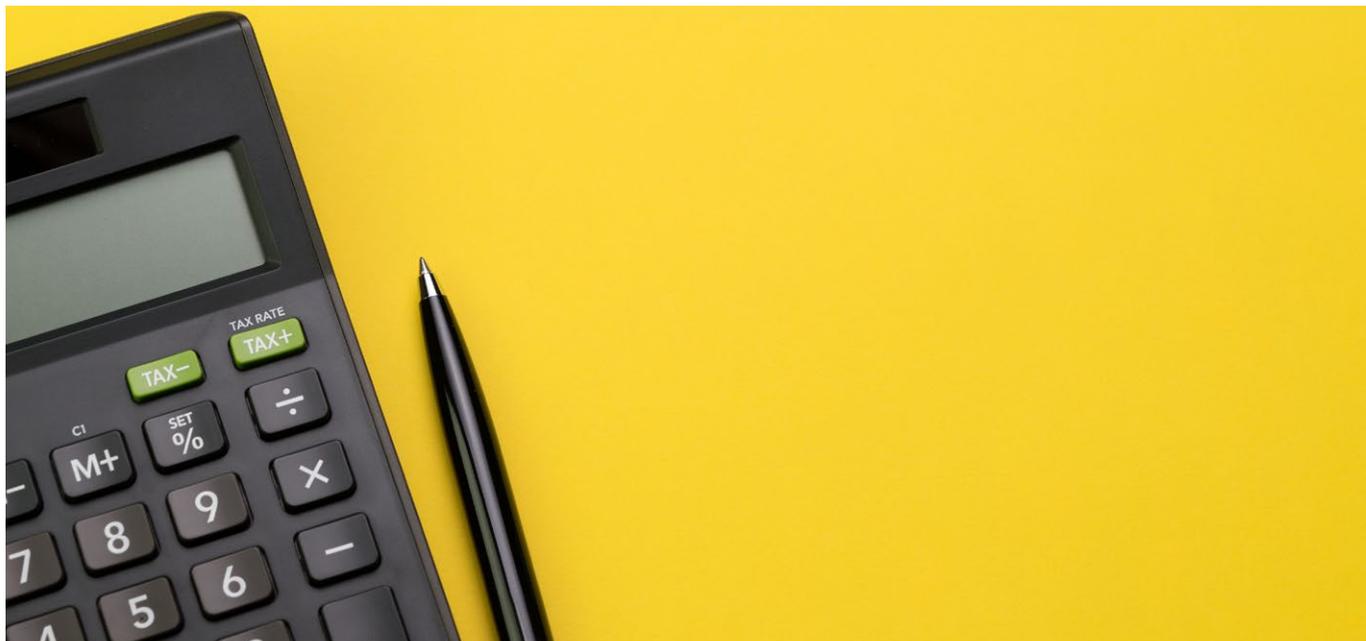
Knowing how to read a lease and understand where the handcuffs are and where the potential open doors is a skill - a skill we have honed over 150 years of advising clients on lease-related issues.

We can advise you about lease breaks, early exits, whether you can or cannot sub-let - in short, how to 'sweat' your lease to achieve your strategic and financial goals.

We will know what your potential exit liabilities are and our team will provide you with a cost for these - allowing you to make informed decisions and budget accurately.

a lease need not be a straitjacket, we can help you negotiate a route map to achieve your goals





occupational costs

Cost management is the midwife of success.

Some costs can be transparent – such as rent, service charge and business rates – whilst other can be more difficult to calculate and/or budget for. These include depreciation., amortised costs and even utilities and other variable costs..

Irrespective of how you define (workplace related) costs, every management team needs to know three things:

- What are they
- How best to manage them
- Are they aligned with the business plan

Our team of experienced and qualified surveyors know how to anticipate and accurately calculate:

- Acquisition costs
- Design & build costs
- Operational costs
- Disposal costs – including dilapidation liabilities.

We have the experience and expertise to help you review them (accurately) and ensure that they are equitable and true; challenge them if inflated or we believe they are inaccurate and manage the entire negotiation process – which allows you to focus on your day job.

informed cost control, underpins bottom line management



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building consultancy

Creating a workspace which is safe, productive and the embodiment of an organisation's brand and culture is what we do best.

We help clients at every stage of their asset owning cycle. Our team of qualified building surveyors has a proven track record of:

- Pre-Acquisition Surveys, Schedules of Condition and conducting Defect/Condition Appraisals
- Workplace consultancy - helping companies create a workplace which embodies their culture, brand aspirations and working philosophies
- Preparing and executing Licenses for Alteration
- Project Managing fit-out plans and other works
- Conducting Reinstatement Cost Assessments
- Advising on exit initiatives such as dilapidations

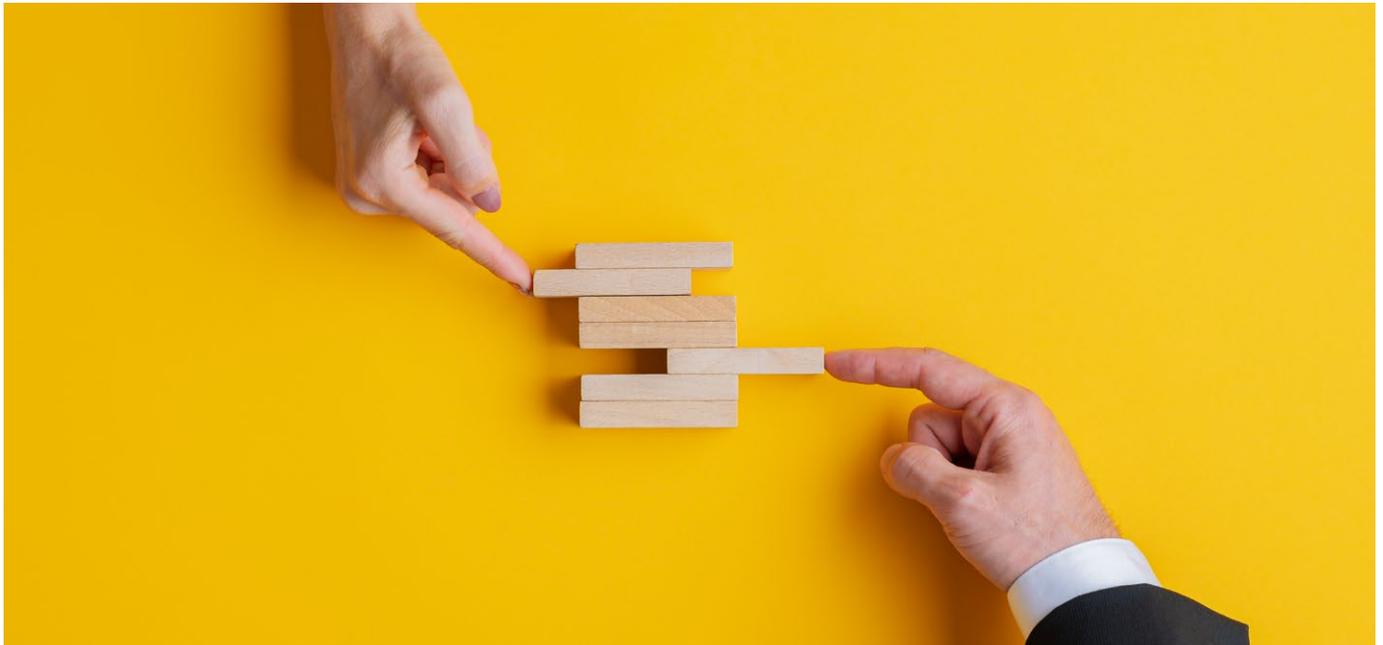
turning a 'space' into a productive, welcoming workplace and brand statement



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minimising disruption

Whether moving into a new workplace or revitalising/reconfiguring an existing one, we know that no organisation can afford to be distracted from its core business. This is why our team is so focused on:

- 'Nailing' the brief quickly
- Submitting costed recommendations, underpinned by clear rationales, in as short a timeframe as possible
- Project Managing the execution of the plan, without distractions
- Identifying potential issues early and making informed recommendations quickly
- Forensically managing the costs, to reduce the risks of budget overruns and the inevitable delays these evoke - especially consuming the management team's time in the resulting decision-making process
- Minimising the impact of any snagging actions.

Our Partner-led teams always comprise qualified professionals who have been selected for their technical skills, relevant expertise and ability to work collaboratively to deliver and assignment on time, on budget, every time.

from inception to completion with minimum distraction from your 'day job'



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business rates

Never assume that the Valuation Office Agency's (VOA) assessment of your premises is correct.

The calculation of this 'property tax' can be challenged and our Business Rates Advisory team has saved clients thousands of pounds by undertaking a thorough process relevant to properties in England of:

- **Check** - we review the factual information held by the VOA on the property, notifying of errors
- **Challenge** - on behalf of our clients, we formally challenge the VOA's valuation, submitting a full case including relevant evidence to underpin our 'Challenge'
- **Appeal** - where recommended and with our clients' approval, we mount an appeal to the Valuation Tribunal for England if we cannot reach an agreement with the VOA. (NOTE: the process differs in Scotland and Wales)

If you have a property or acquired a new asset and you would like someone to review the asset, then talk to us.

is your Business Rates assessment equitable and fair





service charge

There are three ways we can help you:

- **Historic payments** - secure a rebate on what you have paid (you have up to 12 years to make a claim)
- **Current payments** - reduce what you are paying
- **Future payments** - limit what you will pay over the life of the lease

Whether dealing directly with your landlord or a property management company, we will:

- **Adopt** - we review the service charge accounts for your property, adopting an unremitting forensic approach
- **Apply** - we use our considerable technical experience and expertise to identify anomalies and irregularities to leverage
- **Conduct** - all negotiations are conducted with ruthless efficiency
- **Inform** - we will advise you promptly of all significant developments

We will save you money.

a small investment to help you manage your larger ones



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case study

CLIENT

The Takeover Panel, an independent body which supervises and regulates takeovers and mergers in the UK.

BRIEF

Our client's instruction was to relocate a contemporary office in the City of London as close to a lease expiry as possible:

- Located within 0.5M of the Bank of England
- Minimise work practise disruption
- Fulfill the client's IT strategy
- Meet stringent security and financial requirements
- Minimise double overheads

CHALLENGES

Compliance

Working with a regulatory body required stringent due diligence on all move costs including rents, service charges, SDLT, likely Business Rates liability once reassessed by the Valuation Office Agency and fit out the new office as well as dilapidations of the old office.

Cost management

Despite repeated challenges, the project was completed at a cost less than that of 10 years ago.

Knowing the complexity of the brief - finding the right space, at the right price, in the right location and fitting it out to our specific requirements - we are delighted that not only wa sit fulfilled on time and on budget, but the team was professional and a joy to work with, throughout.

Alex Tetley - COO



we can handle your project
from start to finish



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