# Corporate Real Estate Strategy and Occupier Portfolio Management Training Course

17 – 21 May 2027
Milan

# Corporate Real Estate Strategy and Occupier Portfolio Management Training Course

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## Programme Summary

Corporate real estate strategy and occupier portfolio management are the subject of this one-week training course for senior property, workplace and finance leaders, ending in a portfolio decision pack for one occupier estate. Organisations often hold space that no longer matches how the business works, and lease, own or exit choices are made site by site. The programme moves from business demand to portfolio diagnosis, lease and ownership options, workplace design and a ranked action plan, using a prepared occupier estate. Mars Training Centre UK delivers this programme on corporate real estate strategy to mixed-organisation cohorts.

## The Business Case

Property is usually among the largest costs an organisation carries after people, and it is also one of the least flexible. Leaders who tie space to the business plan, test each site against demand and weigh lease and ownership routes on the same basis avoid carrying idle space and can explain every property decision to a board.

- Occupancy Cost: Falls when surplus space is identified and released or reused before leases renew.
- Decision Quality: Improves when lease, own and exit options are compared on stated assumptions.
- Business Alignment: Strengthens when workplace and location choices follow the demand the business plan sets.

## Principles and Evidence Base

- IFRS 16 Leases: The accounting standard that brings lease liabilities and right-of-use assets onto the balance sheet, applied in Session 3 to compare lease and ownership routes.
- ISO 41001 Facility Management Systems: A management system standard used in Session 4 to set the boundary between occupier strategy and day-to-day facilities delivery.
- Total Cost of Occupancy: A costing approach that adds rent, service charges, fit-out, energy and exit costs, applied in Sessions 2 to 5 to compare sites and options.

## Intended Participants

- Corporate real estate leaders who set the property strategy for an organisation or business unit.
- Workplace and space planning managers who translate business demand into space requirements.
- Finance leaders who review lease commitments, property budgets and capital requests.
- Strategy and transformation leaders who plan office, branch or site changes.

Typical settings include banks, government bodies, healthcare groups and large retail or industrial organisations that occupy rather than invest in property.

## Learning Outcomes

1. Participants will be able to translate a business plan into a space and location demand statement.
2. Participants will be able to diagnose an occupier portfolio by utilisation, cost and flexibility.
3. Participants will be able to evaluate lease, own and exit options using total cost of occupancy.
4. Participants will be able to construct a workplace strategy that matches space to work patterns.
5. Participants will be able to prioritise portfolio actions and justify them to an executive board.

## Programme Structure

### Day 1: Corporate Real Estate Strategy and Business Demand

What does the business plan require from its property?

- Business Demand Statement
- Occupier Strategy Framework
- Space Requirement Model
- Location Criteria Matrix
- Property Principles Sheet

### Day 2: Occupier Portfolio Diagnosis

Which sites support the business and which carry unused cost?

- Portfolio Register
- Utilisation Survey Method
- Total Cost of Occupancy Sheet
- Lease Expiry Profile
- Site Contribution Ranking

### Day 3: Lease, Own and Exit Options

How should each site be held, changed or released?

- IFRS 16 Lease Impact Table
- Lease Versus Own Comparison
- Break and Renewal Options Map
- Sale and Leaseback Screen
- Exit and Reinstatement Cost Estimate

### Day 4: Workplace Strategy and Cost Control

How can space follow the way people work?

- Work Pattern Profiles
- Space Standards Review
- Desk and Room Sharing Model
- ISO 41001 Interface Map
- Service Charge Challenge Method

## Day 5: Portfolio Decision Pack for One Estate

Do the findings join into a ranked, costed set of actions?

- Applying the Session 1 Business Demand Statement
- Testing the Session 2 Site Contribution Ranking
- Comparing the Session 3 Option Tables
- Adjusting for the Session 4 Workplace Model
- Completing the Portfolio Decision Pack

## Methodology

The programme is a structured exercise built on a prepared occupier estate of offices, branches and a storage site. Participants diagnose the estate, test lease and ownership routes on the same assumptions and defend their action plan to peers acting as an executive board.

- Suggested activity: Ranking six sites by cost, utilisation and flexibility.
- Suggested activity: Comparing a lease renewal with a purchase on one sheet.
- Suggested activity: Redesigning a floor plan around three work patterns.

## Capstone Output

Each participant completes a portfolio decision pack for one occupier estate. It holds a demand statement, a site ranking, option tables for lease, own and exit, a workplace model and a short action plan. At work it goes to the executive board and sets the review routine for later lease events.

## Frequently Asked Questions

### Is corporate real estate strategy suitable for leaders who are not property specialists?

Yes. Corporate real estate strategy is taught through prepared estate data and templates. You need responsibility for property, workplace, finance or planning decisions, but no earlier experience of lease negotiation or space design.

## Which standards does corporate real estate strategy rest on in this course?

Corporate real estate strategy here rests on IFRS 16 for lease treatment, ISO 41001 for the facilities interface and total cost of occupancy, applied to one prepared estate.

## How is the decision pack from corporate real estate strategy used at work?

You take the portfolio decision pack to your executive board, use its ranking to justify lease and ownership choices, and keep its sheets as the review routine for later lease events.

## How does corporate real estate strategy differ from facilities management?

Corporate real estate strategy decides how much space an organisation needs and how to hold it, while facilities management concentrates on running and maintaining buildings day to day.