

STRATEGY PLANNING FOR BELL PARTNERS, INC.

Greensboro, North Carolina



Project Areas

- Conservation Communities
- Design Economics
- Economic Development
- Economic & Fiscal Impact
- Large Land Holdings
- Master-Planned Communities
- Metropolitan Growth Strategy
- National Apartment Acquisition and Management Company
- Neighborhood Planning
- Public-Private Partnerships
- Townhomes & Dense Single-Family

Bell Partners, Inc.

Scope of Work

- Amenity Program
- Consumer Research
- Economic Analysis
- Financial Modeling
- Fiscal Impact
- Implementation
- Market Analysis
- Partnership Structuring
- Project Segmentation, Positioning, & Pricing
- Public Financing
- Public Outreach
- Regional Economics
- Repositioning
- Retail Tenanting
- Strategy Planning

The Challenge

Four years had passed since Bell Partners, Inc., a private real estate company focused primarily on the acquisition and management of high-quality apartment communities located throughout the United States, had conducted a strategic planning effort. The company believed it was time to update its strategic plan with a view to the next three to five years. RCLCO was retained to facilitate the strategic planning process, ultimately engaging the leadership in defining the company's future direction, with a focus on long-term goals and objectives, organization and governance structure, capital formation and structure, culture and brand, and competitive strategies to ensure Bell Partners' success, prosperity, and sustainability.

Solution

The process began with an extensive Discovery phase, including interviews with key internal and selected external resources, a review of internal company data and industry benchmarks, and extensive "homework" assignments by the Bell Team, all culminating in a Strengths, Weaknesses, Opportunities, and Threats (SWOT) assessment for the company. RCLCO then led the nine-member Strategy Team through a series of four day-long planning sessions to discuss, debate, and formulate the company strategy. The Team then convened a Town Hall Meeting with a broad cross sec-

tion of its leadership team to present and solicit feedback on the plan.

Impact

The strategic plan is being finalized, creating a strong foundation for future prosperity. The Bell Team is now working on implementation.

"I think [RCLCO] did a fabulous job leading our strategic session. It was the perfect balance of pushing us forward but also staying realistic and grounded, without overwhelming the group. I am very grateful for your leadership and insights. Thank you for taking us through the journey and I look forward to your continued guidance and partnership as Bell continues to evolve."

- Lili Dunn, Chief Investment Officer, Bell Partners, Inc.