



# Introduction to Vendor Relationships

# Panelists

Arina Rossin



Chad Miller



Jocelyn Harker



Karen Cowan



Jesus Castillo



Mark Brenneman





# **Why Vendor Relations are Important?**

# Vendor Selection

*Importance of fair selection and procurement*



- ❑ Identify area of expertise
  - ❑ Define scope of work
  - ❑ Identify budget
- ❑ Acquire a list of qualified vendors
  - ❑ Referrals, networking, BOMA
- ❑ Allow vendors to conduct onsite discovery
- ❑ Submit an official RFP (request for proposal) or request formal quotes for the same scope of work
- ❑ Select vendor based on highest alignment with the requirements
  - ❑ Optimal price, relationship, industry expertise

# Onboarding/Work Execution

*Following a successful vendor selection*

- ❑ Provide final quote approval
- ❑ Generate management contract
- ❑ Execute service contract
  - ❑ Ensure clear communication on the necessary documents (COI, W9, etc.)
- ❑ Management team sets up the vendor in their system

- ❑ Create communication plan
- ❑ Tenant introductions (as needed)
- ❑ Execute the work
- ❑ Depending on service validate work quality
- ❑ Process payment



# Vendor Relationships: Management

*Setting up for continued partnerships*



- ❑ Alignment with the goals of the building
  - ❑ Tenant retention
  - ❑ Adding value to the building
- ❑ Create a continuous engagement roadmap
  - ❑ For more strategic initiative
- ❑ Maintain credentials for future work
  - ❑ Improves relationships
  - ❑ Shortens the procurement cycle



**Restoration  
Management  
Company**

**WATER, SMOKE & ENVIRONMENTAL SPECIALISTS**

**How to sustain long term  
relations?**

# Restoration Management Company

- ❑ Establish a mantra
- ❑ Be authentic, present, over deliver-under promise, own mistakes
- ❑ BOMA
- ❑ Face to face connections
- ❑ Become a value added contact
- ❑ Once a relationship is established continue to nurture it
- ❑ Industry mentor.



**Build the relationship, one client at a time and the business WILL come. You do business with someone you know, like and trust.**



**What is the importance of  
an RFP?**

# Allied Universal Security Services



- ❑ Credibility, visibility, and opportunity.
- ❑ Demonstrates expertise and reliability.
- ❑ Know timelines, required documents, and evaluation criteria.
- ❑ Client-specific; avoid cookie-cutter responses.
- ❑ Accuracy matters:
  - ❑ Budgets
  - ❑ Staffing
  - ❑ Compliance
- ❑ The trust is built here



**How to maintain  
relationships/expectations?**

# Allied Universal Security Services

## Maintaining Expectations

- ❑ Roadmap: stay aligned
- ❑ Monitor service delivery and performance
- ❑ Anticipate issues before the client does.
- ❑ Communicate openly and honestly
- ❑ Track lessons learned
- ❑ Ask questions early: uncover clients priorities and pain points

- ❑ **Deliver what you promise**
- ❑ **Communicate proactively**
- ❑ **Set realistic expectations**
- ❑ **Follow up and check in**



**How do you select the right vendor and stay organized?**

# ABM

- ❑ Locate a reputable vendor
- ❑ Obtain references qualified personnel
- ❑ Visit sites where vendor has performed maintenance or repair.



**Organization → Maintain electronic filing system**

# Important Considerations

**Communication**

*Directly improves vendor relations*

**Never assume acronyms**

*Clarify acronyms and pay attention to the context*

**Relationships take time**

*Consistence, reliability, earns trust and repeated business*

# Success Stories

Christmas Eve  
2019



5 Year  
electrical  
maintenance



Track, learn,  
patience and  
persistence





**What does integrity  
mean to you?**