BUSINESS RETENTION &
EXPANSION INTERNATIONAL

Business Retention and Expansion

Firm Visitation Training

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Objectives of the BR&E Visitation Program

- Demonstrate to local businesses that the community appreciates their contribution to the economy
- Help existing businesses solve problems
- Assist businesses in using programs aimed at helping them become more competitive
- Develop strategic plans for long-range BR&E activities
- Build community capacity to sustain growth and development

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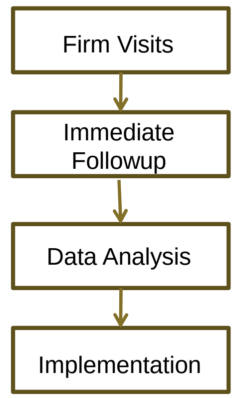
BR&E Visitation Process

There are Four Stages

- Stage 1: Firm Visits
- Stage 2: Immediate Follow-up
- State 3: Data Analysis and Recommendations
- Stage 4: Commencement Meeting and Implementation



First Steps

The Operations Team should:

- Review any problem survey questions
- Designate visitation teams or individuals to visit firms if not already assigned
- Select recorder and interviewer (if using a team approach)
- Distribute the official surveys (includes cover and comment sheets)
- Read the survey and guidelines before interviews
- Understand deadlines and contact information
- Be given the opportunity to ask any final questions

Account Executive's packets should include:

- Copy of the firm's letter introducing the program
- Copy of the program timeline
- Surveys – two copies plus "official response" copy with the informational cover sheet completed
- Copy of local BR&E brochure
- Copy of the "Is It For Our Community?" assessment responses from the Management Team and Stakeholders
- Copy of "Guidelines for Firm Visitors"
- Confidentiality Agreement for the firm
- Account Executive (Firm Visitor) Checklist
- BR&E Firm Visitor Overview

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Visitor Role Play

- This vignette tells you how to get the firm's opinions, how to get high quality data and how to make the visits fun
- The actors in this role play do some things correctly and some incorrectly. Watch for both. Note these items in the chat box.

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Note:

The survey in this role play was much shorter than the normal ones that you would be using in an actual BR&E program

Discussion of Role Play

- The firm owner did no wrong (just as in real life). The visitors did some things correctly and incorrectly.
- What did the person asking the questions do correctly and incorrectly? (noted in chat box)
- What did the persons taking the notes do correctly and incorrectly? (noted in chat box)

Obtaining Firm Opinions

- The reason for doing the BR&E Visitation Program is to build awareness of local business problems in order to help them.
- What happened in the DVD when Kent started offering opinions and tried to influence the answers of the firm owner? (use live mike)
- What do you do if the owner just hands you the survey and does not want to visit? (use live mike)
- Do you have to read survey questions exactly as they are stated? (use live mike)

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Firm Visits Are Fun!

Remember

- The Operations Team can't make good decisions on priorities if the data from the survey has a lot of missing items or isn't clear
- And if the completion rate is low, the quality of the data goes down as well as leaving a bad impression to the firm about the program
- Either visit the firms in teams of two or have significant practice in asking the questions and taking detailed notes from the responses
- Above all, remember that "Visits are fun!"

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Final Notes: Informed Consent and Non Disclosure Agreement

- It is paramount that the firm understand how their responses may be used and that their individual responses will not be shared without their permission
  - The informed consent agreement details the uses of the data that is gathered from the firm visit and survey implementation
  - The non-disclosure agreement assures the firm that its individual responses won't be shared
- Remember that while the long-term goal of the BR&E program is to assist existing businesses, the short-term reality is that the business is doing the BR&E program a "favor" in participating in the survey program
- Be mindful of the "customer service" aspect of these agreements

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Oft-asked questions by Account Executives

- Who schedules the visits?
  - This will typically be the Operations Team members
- When to call to set up the visit?
  - Try not to call before 9:00 a.m., after 4:00 p.m., or during lunch
- When to visit?
  - This should be left up to the firm. Be aware that the firm owner/manager may want to meet before 8:00 or after 5:00
- Where to visit?
  - The visit setting should also be left up to the firm, but with some caveats. The place of business may be best due to fewer "nonformal" interruptions.

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Oft-asked questions by Account Executives

- What if they refuse?
  - Thank them for their time and always be courteous and grateful. Try to make sure that they receive future information about the value of the program.
- What do you do after the visit?
  - Be sure to thank the firm owner/manager for the time s/he has taken to respond to the survey
  - Share the program timeline, especially the projected date for any future reports/presentations/recommendations
  - Review your notes to ensure you understand the responses
  - Seek to immediately identify any "red flag" issues
  - Enter the responses into the database as soon as possible

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Questions

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