



BUSINESS RETENTION &
EXPANSION INTERNATIONAL

Business Retention and Expansion

Summary of Good Practices in
BR&E Visitation Programs

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Firms to be Visited

- ▶ How are the targeted industries/business selected?
- ▶ Where can firm information be obtained?
- ▶ How should the sample be selected?
- ▶ How many do you select?



Research Report Writer

- ▶ How would you find a qualified report writer?
- ▶ What questions would you ask them?
- ▶ Can you write the report yourself?




Surveys


- ▶ Should questionnaires be mailed or hand delivered out to firms in advance?
- ▶ What should these questionnaires look like?
- ▶ Should the entire questionnaire or only a part be sent to the responding firm?
- ▶ When should they be sent or delivered?



Cover Letter

- ▶ Should the volunteers who will visit be named in the cover letter to firms?
 - ▶ What entity's letterhead should be used for the BR&E mailing?
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Media Coverage

- ▶ What coverage should be done before the firm visits?
 - ▶ Why?
 - ▶ Who should contact the media outlets and what media outlets should be contacted?
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Red Flags

- ▶ Does anything need to be done regarding potential red flag issues before the visits are conducted?
- ▶ If so, what?
- ▶ If so, who?



Undertaking the Firm Visits

- ▶ How many firms should be visited?
- ▶ Who recruits the visitors?
- ▶ How do you match teams with firms?
- ▶ How many people should go to a firm?
- ▶ How many firms should each person or team be asked to visit?
- ▶ How quickly should visits be done?
- ▶ Who makes the initial contact with the firm?



BR&E Project Coordinator

In which of the steps in the preparation for the firm visits should you as the REN Program Manager assist the Account Executives and the Operations Team?



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Questions????

