



**BUSINESS RETENTION &
EXPANSION INTERNATIONAL**

Business Retention and Expansion

An Economic Development Strategy to Work
With Your Existing Businesses

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What Is a BR&E Program?

- ▶ BR&E includes all efforts to encourage the retention and growth of a community's existing businesses

- ▶ Technical training
- ▶ Management seminars
- ▶ Identify local sources of inputs
- ▶ Improve labor/management relations
- ▶ Reduce cost **and** improve quality of local services
- ▶ Improve school/work relationships
- ▶ Retaining youth in the community

BR&E Visitation Program

- ▶ The BR&E visitation program is a special type of BR&E program
 - ▶ Surveys existing businesses to determine their perceived strengths, weaknesses, opportunities and threats – particularly as these apply to the local/provincial economic environment
 - ▶ Uses a standardized survey instrument to obtain specific information from existing businesses
 - ▶ Surveys are conducted by trained economic development professionals on a “continuous” basis
 - ▶ Analysis of survey responses provides insight to the removal of barriers and the enhancement of opportunities to business (and job) growth

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Why Implement a BR&E Visitation Program?

- ▶ Communities can't do it **all** (ask yourself, “What is **all**?”)
- ▶ The process identifies needs of individual companies (Company Specific issues) and systemic issues facing all companies (Company Common issues)
- ▶ Prioritizes existing firm-related projects subject to the following types of criteria:
 - ▶ The types of firms in the community
 - ▶ The pressures they face
 - ▶ Other local factors

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What is a BR&E Visitation Program?

“...is an action-oriented process for learning about the concerns of local businesses and setting priorities for BR&E projects to address these needs.”

George Morse
University of Minnesota

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Basic Types of BR&E Visitation Programs

- **Traditional or Volunteer Visitor**
 - Uses volunteer visitors from the community to survey the businesses; process is entirely community driven
- **Paid Professional**
 - Community drives the process, but a paid professional surveyor is used for business visits
- **Segregated**
 - Economic development professionals develop and implement the process, but a community plan is the key process goal
- **Continuous**
 - Economic development professionals develop and implement the process, but the goal is focused on relationship building with the business

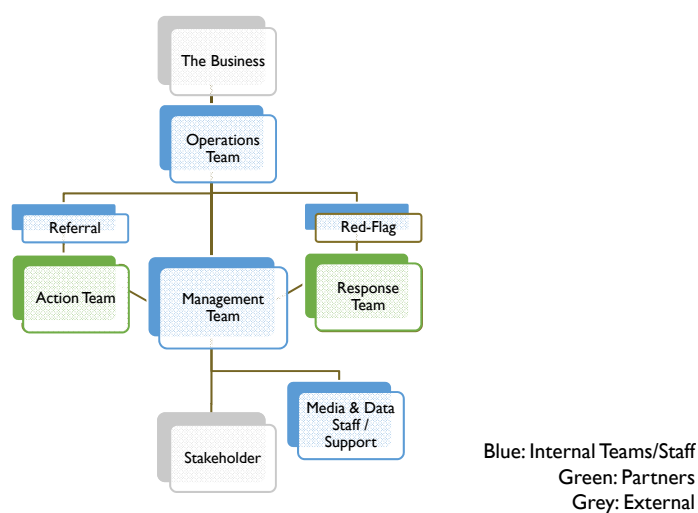
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Continuous Process Key Features

- ▶ The process is comprised of three main process sets
 - ▶ **Internal processes** – management team, account executives
 - ▶ Management team – facilitates the overall process
 - ▶ Account executives – responsible for firm visits and response/referral team interactions
 - ▶ **Partnership processes** – response and action teams
 - ▶ Response team – addresses yellow and red flag issues arising from the diagnostic visit
 - ▶ Action team – the “client services network” that provides programs and tools to BR&E clients
 - ▶ **External processes** – businesses and stakeholders
 - ▶ Businesses – the primary beneficiaries of the BR&E program
 - ▶ Stakeholders – those in the community with an interest in the local economic environment

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Continuous Process Features



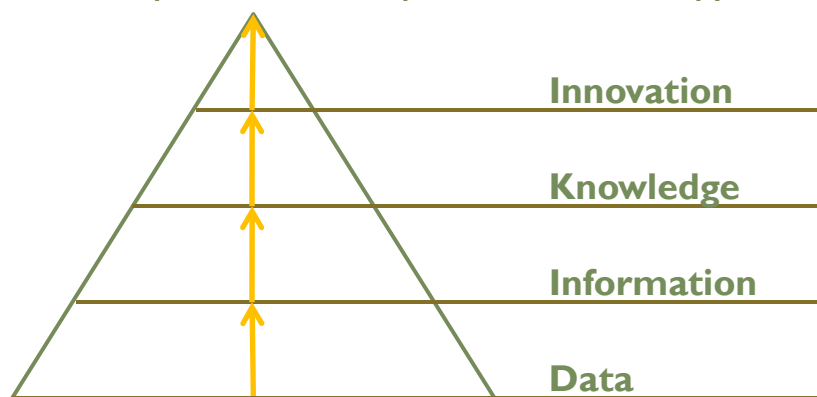
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Continuous Process Key Features

- ▶ Grassroots program with local buyin
- ▶ The local EDO plans and organizes the program
- ▶ Economic development professionals (account executives) visit the firms
- ▶ The program builds linkages and networks
- ▶ The stakeholders have a greater understanding of the local economy
- ▶ Followup is built into the program process
- ▶ BR&E Programs plan for something to happen
- ▶ The program responds to the weaknesses and threats identified in the survey
- ▶ Business-specific solutions
- ▶ Local economic environment issues are addressed

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This type of activity can move the local development office up the innovation pyramid



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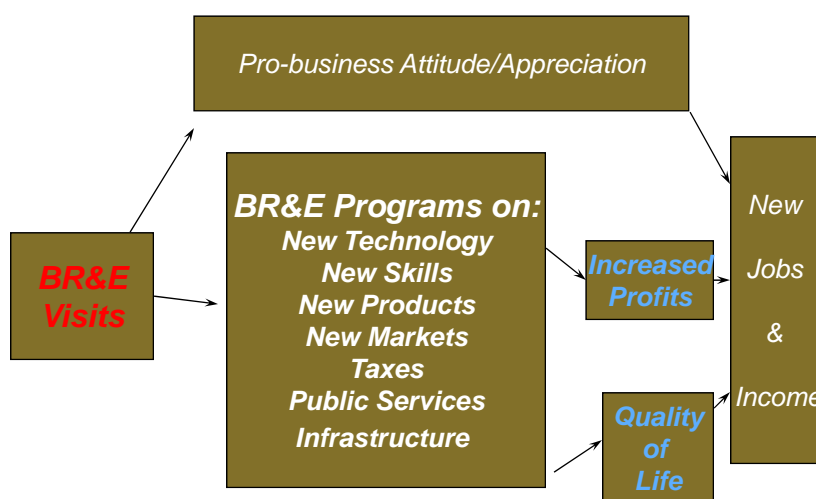
Source: Steve Deller, University of Wisconsin. NACDEP presentation, 2010.

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
- ▶ Identify and address issues that face all businesses
- ▶ Develop strategic plans for long-range BR&E activities
- ▶ Build community capacity (a major portion of this is through social capital) to sustain growth and development

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From BR&E Visits to Jobs



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BR&E Program Components

Management Team

- Develops and implements overall program

Management Team



Operations Team

- Surveys businesses and builds relationships

Operations Team



Response Team

- Develops strategies for immediate crises

Response Team



Action Team

- Addresses Specific and Common Business issues

Action Team

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BR&E Program Components

Management Team

- Develops and implements overall program
- Primary liaison with stakeholders
- Comprised of the program manager or director and support staff

Management Team



Operations Team



Response Team



Action Team

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BR&E Program Components

Operations Team

- ▶ Surveys businesses and builds relationships
- ▶ Implements the program designed by the management team
- ▶ Establishes initial contact with businesses
- ▶ Conducts follow-up visits with businesses
- ▶ Primary liaison with Response and Action Teams
- ▶ Primarily composed of the Account Executive(s)

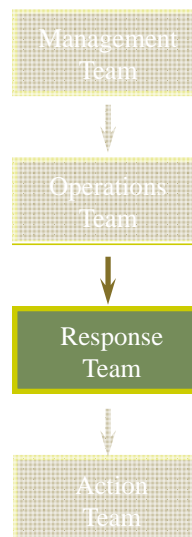


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BR&E Program Components

Response Team

- ▶ Develops strategies to address immediate crises
- ▶ Specific membership is formed based on the yellow/red flag
- ▶ Membership must be prepared to address specific issues in a timely manner

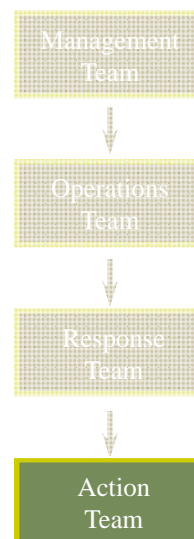


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BR&E Program Components

Action Team

- ▶ Addresses Specific and Common Business issues
- ▶ Membership is typically more stable than that of the Response Team
- ▶ Works with the Operations Team to identify specific issues that arise and program partners that can address specific issues



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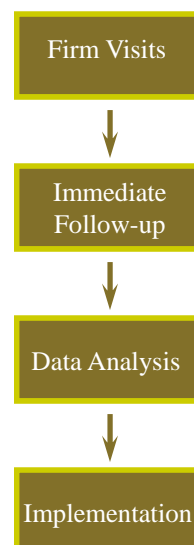
BR&E Program Process

Firm Visits – Operations Team

Immediate Follow-up – Operations and Response Teams

Data Analysis – Operations, Response and Action Teams

Implementation – Action Team with overview by Operations Team



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Who's Involved in a Visitation Program?

LOCAL PLAYERS

- ▶ Stakeholders
 - ▶ Elected leadership
 - ▶ Employees
 - ▶ Econ dev orgs
- ▶ Businesses
- ▶ Management Team
- ▶ Operations Team

RESOURCES

- ▶ BREC/BREP
- ▶ REN (Coordinator)
- ▶ Universities
- ▶ Utilities
- ▶ Other

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Factors Influencing the Degree of Success

- Adoption of strategic planning methods/process
- Listing of individuals who will take responsibility
- Length of time between report completion and project implementation/completion
- Participation
- Having an adequate complement of resources
 - Funding, time, etc.
- Presence of full-time professionals in community

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Questions

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