

Business Retention & Expansion

Summary of Good Practices in BR&E Visitation Programs

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Firms to be visited

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

2

Researcher/Report Writer

- How would you find a qualified researcher/report writer?
- What questions would you ask to determine if they are capable of performing this work?
- Can you write the report yourself?

3

Surveys

- Should questionnaires be mailed or hand-delivered to the 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 the questionnaire be sent or delivered?

4

Media coverage

- Should the media be involved before the firm visits begin?
- Why?
- Who should contact the media outlets and what media outlets should be contacted?

5

Red, yellow, and green flags

- Does anything need to be done regarding potential red, yellow, or green flag issues before the visits are conducted?
- If so, what?
- If not, why not?
- If so, who?

6

Undertaking the firm visits

- How many firms should be visited?
- Who makes the initial contact with the firm?
- Who should be scheduling and performing the visits?
- How do you match firms with visitors?
- 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 performed?

7

BR&E Project Coordinator

In which of the steps in the preparation for the firm visits should you as the REN Program Manager (or a like role) assist the Account Executives and the Operations Team?

8

Questions