

Business Retention & Expansion

Red, Yellow, and Green Flag Review

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Review Definitions

- **Red Flags**
 - Important problem issues that are time critical. Should be addressed in a matter of days.
- **Yellow Flags**
 - Problem issues that are not as time critical as red flags. These issues are often more systemic and may take from a few weeks to several months to address.

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Review Definitions

- Green Flags
 - Time critical opportunities that can expand a firm's business if addressed or cause a firm to forego significant business if left unaddressed.
 - Should be addressed in a matter of days.
 - Issues often include major contracts that could bid or secured if infrastructure, educational, zoning, etc., needs are met.

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Review Process

- It may be helpful to develop supporting materials to assist in the flag review process or in working with partners to address issues.
 - Consider developing materials such as the Red Flag Review Points, the Appendix F Follow-up Suggestions, and the Red Flag Follow-up Worksheet.
- **IMPORTANT:** The business should *always* provide permission to bring third parties into the process.
 - **This includes the BR&E Response Team.**

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Recall Section 5 Partner/Collaborator Teams

- Response Team
 - The Response Team is a unique feature of a continuous/ segregated BR&E Visitation Program that is not commonly found in the Volunteer Visitor model.
 - It's primary responsibility is to assist with issues that cannot (or should not) be addressed by the organization's Operations Team.
 - Develop an asset map of current and potential Response Team members complete with areas of expertise to address all issues.

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Response Team Considerations

- It's important to remember that problems are not the same as opportunities.
- Recall the dynamic nature of the Response Team
 - Different team members may be called upon to address red versus green or even yellow flag issues.
- Consider the strengths of each potential Response Team member when preparing to address a flag issue.
- An asset map or directory can facilitate this process

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Flag Review Process

- The account executive will be the first line in identifying red/yellow/green flag issues, either from the visit's conversation or from the resulting data
- After identifying potential issues and getting permission from the business, the Account Executive should work with the Operations Team to ascertain the following:
 - What issues by the business should come to the forefront?
 - Who are potential **effective** Response Team members?

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Flag Review Process

- Once an effective Response Team has been assembled:
 - Issues identified should be discussed to determine the technical assistance or programs in the community that can address the issues
 - There are likely many avenues that can be used to address the issues, but make sure that the issue can be addressed in a timely manner.
 - The business defines **timely manner**.

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Questions?

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