Business Retention & Expansion

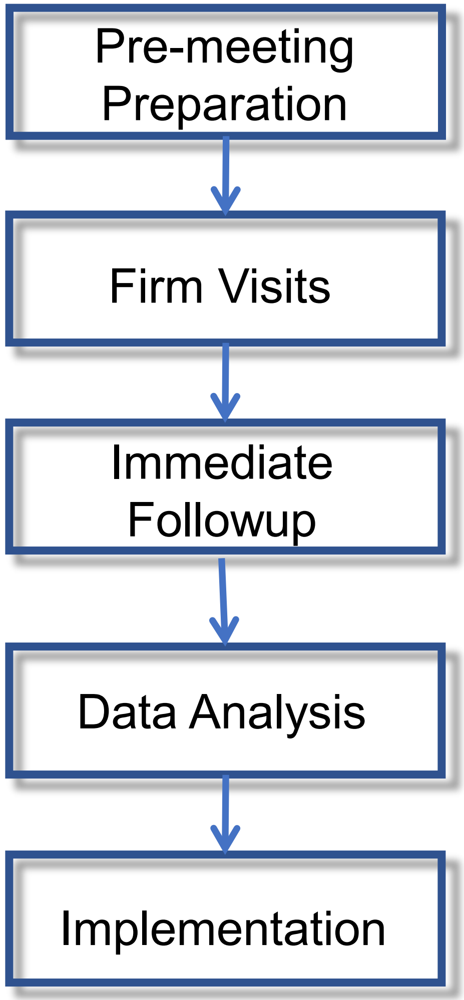
Firm Visitation

Objectives of the BR&E Visitation Program

- Demonstrate to local businesses that the community appreciates their contribution to the economy and social fabric
- 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

BR&E Visitation Process

- Four stages of the process
  - Stage I: Pre-meeting Preparation
  - Stage II: Firm Visits
  - Stage III: Immediate Follow-up
  - Stage IV: Data Analysis and Recommendations
  - Stage V: Commencement Meeting and Implementation



In the Beginning …

- **The key to a successful program is planning and marketing**
- Publicize the program (especially in a small community)
  - Involve local leaders (law enforcement, faith leaders, elected officials) to provide legitimacy
- Send a letter of introduction to targeted businesses to outline the program
- Develop a brochure or fact sheet to inform the public about the program's objectives
- Stakeholders are your best marketers; ***use them wisely!!***

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, comment sheets and informed consent)
- Read the survey and guidelines before interviews
- Understand deadlines and contact information
- Be given the opportunity to ask any final questions

Account Executive’s Packet

- Copy of the firm’s letter introducing the program
- Copy of the program timeline
- Survey or diagnostic tool (two copies plus “official response” copy with the informational cover sheet completed if Volunteer Visitor or Paid Professional model)
- Copy of the local BR&E brochure
- Copy of the “Is It For Our Community?” assessment responses from the Management Team and Stakeholders
- Confidentiality and Data Use Agreements for the firm
- Account Executive (Firm Visitor) Checklist
- BR&E Firm Visitor Overview

Visitor Role Play

- This vignette shows 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.
- It would likely be beneficial to have Account Executives participate in this type of role play for practice.

Note:

The survey in this role play may be shorter than the one that you would be using in your BR&E program

Discussion of Role Play

- The owner of the firm did not wrong (just as in real life). The Account Executives did some things correctly and some incorrectly.
- What did the person asking the questions do correctly and incorrectly?
- What did the person taking the notes do correctly and incorrectly?

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 video when Kent started offering opinions and tried to influence the answers of the firm owner?
- What do you do if the business owner does not want to participate in the visit?
- Do you have to read survey questions exactly as they are written?

Firm Visits are Fun!

Remember:

- The Operations Team can’t make good decisions on priorities if the data from the survey has a lot missing items or isn’t clear
- If the completion rate is low, the quality of the data goes down as well as leaving a bad impression on 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 the firm visits are fun!

Final Notes: Informed Consent and Non-Disclosure Agreements

- 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 use 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
- Be mindful of the “customer service” aspect of these agreements

Questions from Account Executives

- Who schedules the visits?
  - Visits are typically scheduled by the Account Executives (the person(s) that are actually visiting the businesses).
- When should you call to set up the visit?
  - Try not to call before 9:00 am, after 4:00 pm, 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 am or after 5:00 pm
- Where to visit?
  - The visit setup should also be left up to the firm, but with some caveats. The place of business may be best due to fewer “nonformal” interruptions

Questions

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