Fundamentals Course Assignment

Final Project

Throughout this course, we've talked about the different elements that are essential to develop a Business Retention and Expansion Visitation Course. For your final project, develop a concise narrative or outline that describes your plan of work for implementing this type of program in your organization. Be sure to provide some insight regarding the way that the elements that we've discussed throughout the course will be included in the program.

This outline is not meant to be definitive nor comprehensive, but it is meant to be an aid for you in developing the initial logic of the program. Please try to have this exercise completed and submitted by the end of business on April 14, 2022.

Response 1

Business Retention & Expansion (BR&E) Visitation Program Plan of Work

I. Program Purpose and Strategic Alignment

The purpose of this BR&E Visitation Program is to establish a structured, relationship-driven system to support existing businesses while generating actionable information for economic decision-making. The program will formalize business engagement, moving beyond informal outreach to a consistent, documented process.

Primary objectives:

- Retain and grow existing jobs
- Identify expansion opportunities
- Detect risk factors early
- Strengthening coordination among community partners
- Build long-term social capital between businesses and local leadership

Initial focus will be on primary employers, high-impact small businesses, and strategically significant sectors.

II. Governance and Leadership

A BR&E Steering Committee will guide the program, including representatives from:

- Economic development
- City administration
- Chamber of commerce
- Workforce and education partners
- Utilities

Responsibilities:

- Set annual visitation targets
- Review aggregated findings
- Prioritize systemic issues
- Ensure follow-up accountability

A designated Program Coordinator will manage operations, volunteer training, scheduling, data tracking, and issue follow-through.

III. Visitation Strategy

Phase 1: Launch Blitz (First 60–90 Days)

A structured visitation blitz will establish momentum and baseline data. Target: 25–40 priority businesses. Volunteer teams (two-person teams) will conduct visits. All volunteers will receive training on:

- Program purpose
- Confidentiality standards
- Interview techniques
- Documentation procedures
- Escalation protocols
- The goal of visits is listening and documenting—not solving issues during the meeting.

Phase 2: Continuous Model

- After the blitz, the program transitions to ongoing visitation.
- Annual targets:
- Visit 20–25% of identified businesses
- Revisit major employers every 12–18 months
- Track trends over time approach supports relationship depth and long-term data integrity.

IV. Business Selection Criteria

Businesses will be prioritized based on:

- Employment size and industry importance
- Growth or expansion potential
- Supply chain impact
- Risk indicators
- Ownership transitions

This ensures strategic deployment of staff and volunteer capacity.

V. Data Collection and Categorization

The visitation instrument will include structured and open-ended questions addressing:

- Workforce availability and skills gaps
- Revenue and business conditions
- Expansion or contraction plans
- Infrastructure and facility needs
- Regulatory or permitting challenges
- Technology and capital needs
- Overall business outlook

Findings will be categorized into:

- Immediate action items (response within 1–2 weeks)
- Short-term issues (3–6 months)
- Long-term strategic challenges

All data will be entered into a secure tracking system to monitor progress and trends.

VI. Issue Response Protocol

A formal response system ensures credibility and accountability:

- Urgent issues escalated within 48 hours.
- Assigned partner agency identified with response timeline.
- Follow-up documented in tracking system.
- Business contacted within 30 days to confirm resolution or progress.

This structured follow-through differentiates the program from informal outreach efforts.

VII. Reporting and Communication

Quarterly reports will be presented to:

- City leadership
- Economic development board
- Chamber and partner organizations
- BR&E volunteers

Reports will include:

- Visits completed
- Industry distribution
- Issues resolved
- Emerging risks and opportunities

Early reports will focus on trends and qualitative themes rather than volume statistics. Findings will be translated into charts, summaries, and prioritized action steps to convert raw data into decision-ready information.

VIII. Volunteer Engagement and Sustainability

Sustained volunteer engagement will be supported through:

- Clear expectations and training
- Regular impact updates
- Public recognition when appropriate
- Annual refresher sessions

Maintaining volunteer involvement strengthens community ownership and social capital.

IX. Performance Measurement

Success will be evaluated through:

- Activity Measures
- Number of visits completed
- Percentage of target businesses contacted
- Volunteer participation
- Outcome Measures
- Issues resolved
- Referrals completed
- Expansion projects identified
- Jobs retained or created

Annual review will refine priorities and visitation targets.

X. Long-Term Vision

Over time, the BR&E program will evolve from reactive issue management to proactive business growth support. As trust deepens, businesses will engage earlier regarding expansion plans, workforce needs, and strategic investments.

By integrating structured visitation, disciplined follow-up, transparent reporting, and coordinated partner response, this program establishes a sustainable system for strengthening the local economy and positioning the community for long-term resilience.

Conclusion:

This plan reflects not only an understanding of BR&E best practices but also a practical roadmap for execution. The governance structure, visitation strategy, data management system, and response protocols are designed to be implemented immediately with existing community partners and resources. By clearly defining roles, timelines, and accountability measures, this program is positioned to move from concept to action without delay. I am prepared to initiate stakeholder alignment, volunteer recruitment, and the launch blitz phase, ensuring that the BR&E program becomes a structured, sustainable, and results-driven component of our economic development efforts.

Response 2

Part 1

Plan of Work for Implementing the IEDP BRE Program

1. Establish the Purpose and Outcomes

Core Objective:
Strengthen existing business relationships, identify risks early, support expansions, and build long-term economic resilience.

Define Measurable Outcomes

- % of target companies visited annually (.05%)
- Number of expansion projects
- Jobs retained
- Capital investment supported
- Issues resolved within defined timeframe
- CEO satisfaction score (post-visit survey)
- Business confidence index (annual)

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2. Build Internal Alignment

- Lead department (Irving Economic Development Partnership)
- IEDP (Data owner)
- Salesforce (CRM platform)
- City of Irving Response Team (City manager's office, Permitting, Workforce, Utilities)

Create:

- Standard visit protocol (100 per fiscal year)
- Confidentiality policy
- Issue escalation process (72-hour internal review standard is ideal)
- Reporting cadence (monthly dashboard-board report/Semi-Annual City Council report)

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3. Define Target Companies

- **Primary employers** (Advanced Manufacturing/Logistics & Supply Chain Management/Aviation & Aerospace Services, Information Technology & Data Centers/Financial Services & Corporate Operations)
- **High-growth sectors** (AI, renewable energy, electric vehicles & sustainable transportation, automation and cloud computing, plant-based foods and alternative proteins)
- **Industrial/manufacturing** (Celebrate during manufacturing week)
- **Headquarters & Corporate Offices** (11 **Fortune 1000** once per year)
- **At-risk industries (**Companies in consolidating industries, companies nearing major lease renewals, businesses affected by regulatory or supply chain changes)

Tier system:

- Tier 1: Strategic employers (annual executive visit)
- Tier 2: Growth firms (bi-annual touchpoint)
- Tier 3: Small business clusters (Small Business Services Committee roundtables/BOSS events)

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4. Develop the BRE Visit Framework

Standard Visit Structure: Utilize 5 Year Strategic Plan

1. Workforce
2. Supply chain
3. Infrastructure
4. Regulatory experience
5. Expansion outlook
6. Risk indicators

Collect both:

- Quantitative data (employment, capital plans)
- Qualitative intelligence (confidence, challenges, relocation risk)

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5. Build a Rapid Response Protocol

After each visit:

- Issues logged within 24 hours (Salesforce)
- Internal review within 72 hours (BRE Director)
- Assigned lead (BRE Director)
- Follow-up within 7 business days (BRE Director)
- Closed-loop communication (Update Vice President)

Track:

- Issue type frequency

- Average resolution time
- Repeat issue patterns

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6. Reporting & Metrics Dashboard

Board/Executive Committee Report/Semi-Annual City Council Report:
- Visits completed vs. goal (100 visits per fiscal year)
- Expansion leads identified (No metric required/data entered in Salesforce)
- Jobs Retained (2,625 per fiscal year)
- Capital investment (No BRE quota)
- Top 5 recurring issues (N/A)
- Satisfaction index (N/A)
- Risk heat map (Optional)

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7. Institutionalize the Program
- Annual BRE strategic review (September with ED team)
- Ambassador recognition event (During the Best in Irving event-April)
- Results included in Semi-Annual City Council report

PART II:

Steps to Create the IEDP BRE Ambassador Program

Step 1: Define the Role of Ambassadors

Ambassadors are:
- Relationship builders
- Intelligence gatherers
- Trust connectors
- Early warning system participants

They are not:
- Sales reps
- Regulatory enforcers
- Political advocates

Step 2: Recruit the Right Profiles

Ideal Ambassador Candidates:

- Retired executives
- Industry leaders
- Banking professionals
- Workforce leaders
- Utility reps
- Board members (current/previous)

Selection Criteria:

- Strong business credibility
- Discretion and professionalism
- Community commitment
- Ability to listen (critical skill)

Target size:

- 10–20 ambassadors

Step 3: Develop a Structured Training Program

1. What is BRE and why it matters
2. Confidentiality standards
3. Interview techniques
4. Economic development basics
5. How to identify expansion signals
6. Risk indicators (mergers, automation, layoffs)
7. CRM reporting process

Include:

- Mock visit simulations
- Standard script templates
- Issue escalation protocol

Step 4: Assign Coverage Areas

Structure ambassadors by:

- Industry
- Geography
- Company tier
- Sector expertise

Pair ambassadors- one to conduct interview/one to take notes:

- Staff + Ambassador
- Two ambassadors for all visits when possible

Step 5: Implement Reporting Discipline

After each visit:

- Ambassador submits visit summary within 48 hours
- BRE Director (or Coordinator) reviews and categorizes issues
- Dashboard updated bi-weekly

Ambassadors should never independently promise solutions — all responses coordinated through staff.

Step 6: Recognition & Retention

To sustain engagement:

- Annual recognition event (With the Best in Irving)
- Quarterly briefings
- Economic trend updates
- Exclusive CEO roundtables (relaunch program & include Mayor)
- Recognition awards (Holiday gift)

Provide ambassadors:

- Program impact report
- Community economic snapshot
- Confidential insights briefings

Integration Model: Staff + Ambassador Hybrid

Best practice is a **tiered hybrid model**:

Company Tier	Staff Lead	Ambassador Role
Tier 1	Yes	Support/Relationship
Tier 2	Shared	Lead
Tier 3	Ambassador	Light touch

Timeline to Launch (90-Day Model)

Month 1

- Define goals
- Secure board approval
- Build CRM structure
- Draft visit protocol

Month 2

- Recruit ambassadors
- Conduct training
- Identify first 50 target companies

Month 3

- Launch pilot visits
- Review early issues
- Refine process
- Issue first internal dashboard

Risk Factors to Avoid

- Treating BRE as reactive only
- No formal issue tracking
- Lack of executive-level visits
- Overpromising during visits
- Failure to report outcomes

Long-Term Impact of a Strong BRE Program

- Higher business survival rate
- Earlier expansion identification
- Reduced surprise relocations
- Stronger public-private trust
- More accurate economic forecasting
- Greater political credibility

Become a Business Retention & Expansion (BRE) Ambassador

Strengthen Local Business. Strengthen Our Economy. Strengthen Our Future.

Why This Matters

Existing businesses create the majority of new jobs and capital investment in any community. A strong BRE program ensures we:

- Identify expansion opportunities early
- Address business concerns before they become risks
- Retain key employers
- Strengthen public-private trust
- Improve economic resilience

As a BRE Ambassador, you become part of the trusted network that supports and protects our local economy.

What is a BRE Ambassador?

A BRE Ambassador is a trained business leader who:

- Conducts structured company visits
- Builds trusted executive-level relationships
- Identifies workforce and operational challenges
- Flags expansion opportunities
- Serves as an early warning system for risk indicators
- Provides feedback to the economic development team

Ambassadors do **not**:

- Promise incentives or solutions
- Negotiate on behalf of the city
- Act as regulators or inspectors

Ambassador Responsibilities

- Participate in training (2–3 hours annually)
- Conduct 6–12 company visits per year
- Submit visit summaries within 48 hours
- Maintain strict confidentiality
- Attend quarterly briefings

Ideal Candidates

We are seeking:

- Current or retired executives
- Industry leaders
- Banking and finance professionals
- Workforce and education leaders
- Utility and infrastructure professionals
- Chamber or board leaders

Key qualities:
✓ Strong business credibility
✓ Excellent listening skills

✓ Discretion and professionalism
✓ Commitment to community prosperity

Program Impact Metrics

Our BRE Program tracks:

- % of target employers visited annually
- Expansion projects identified
- Jobs retained
- Capital investment supported
- Average issue resolution time
- CEO satisfaction scores

Ambassadors directly contribute to measurable economic outcomes.

Why Serve?

- Expand your executive network
- Gain exclusive economic intelligence briefings
- Shape the future of our business climate
- Support long-term community prosperity
- Be recognized annually for your leadership

Time Commitment

Estimated: 3–5 hours per month

Interested in Serving?

Contact:
Sharon Hardaway
214-217-8484
shardaway@irvingchamber.com

Help us build a stronger, more resilient business community.

BRE KPI DASHBOARD TEMPLATE

This template can be used for quarterly board reporting or internal management review.

BUSINESS RETENTION & EXPANSION (BRE) DASHBOARD

Reporting Period: Q__ 20__

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1. Activity Metrics

Metric	Goal	Actual YTD	% of Goal
Total Company Visits			
Tier 1 Visits			
Tier 2 Visits			
Ambassador-Led Visits			
CEO-Level Meetings			

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2. Expansion & Retention Outcomes

Metric	Qtr	YTD
Expansion Projects Identified		
Projects Assisted		
Jobs Retained		
Jobs Created (Expansion)		
Capital Investment Supported		
Incentive Requests Facilitated		

3. Issue Resolution Performance

Metric	Qtr	YTD
Issues Identified		
Workforce Issues		
Infrastructure Issues		
Regulatory Issues		
Avg. Resolution Time (Days)		
% Resolved Within 30 Days		

4. Business Confidence Indicators

Indicator	Current	Previous Qtr	Trend
CEO Confidence Index (1–5)			
% Planning Expansion (12 mo.)			
% Reporting Workforce Shortage			
% At-Risk (Consolidation/Relocation)			

5. Ambassador Engagement Metrics

Metric	Goal	Actual
Active Ambassadors		
Ambassador Retention Rate		
Avg. Visits per Ambassador		
Training Participation Rate		

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6. Risk Heat Map (Narrative Summary)

Top 3 Emerging Risks:

1. ______
2. ______
3. ______

Top 3 Expansion Signals:

1. ______
2. ______
3. ______

7. Executive Summary

- Key Wins:
- Emerging Concerns:
- Recommended Policy or Process Adjustments:
- Resource Needs:

A fillable Excel KPI template structure and a CRM data field structure for tracking BRE metrics

Below are two implementation-ready structures you can hand directly to your data manager or CRM administrator.

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1 FILLABLE EXCEL KPI TEMPLATE STRUCTURE

(Designed as a multi-tab workbook for quarterly BRE reporting)

Workbook Structure (Tabs)

1. **Company Master List**
2. **Visit Log**
3. **Issues Tracker**
4. **Expansion Pipeline**
5. **Ambassador Activity**
6. **Quarterly Dashboard (Auto-Calculated)**

TAB 1: Company Master List

Field Name	Description	Data Type
Company ID	Unique identifier	Text
Company Name	Legal name	Text
Industry Sector	NAICS / cluster	Dropdown
Tier Level	Tier 1 / 2 / 3	Dropdown
Primary Contact	CEO/Plant Manager	Text
Email		Text
Phone		Text
Address		Text
Employees (Current)		Number
Square Footage		Number
Year Established		Number
Risk Level	Low / Medium / High	Dropdown
Last Visit Date		Date
Next Visit Due		Date
Assigned Staff Lead		Dropdown
Assigned Ambassador		Dropdown

TAB 2: Visit Log

Each row = one visit

Field	Type
Visit ID	Auto
Company ID	Lookup
Visit Date	Date
Visit Type	In-person / Virtual
Conducted By	Staff / Ambassador / Both
CEO Confidence Score (1–5)	Number

Field	Type
Workforce Concern (Y/N)	Dropdown
Infrastructure Concern (Y/N)	Dropdown
Regulatory Concern (Y/N)	Dropdown
Expansion Discussed (Y/N)	Dropdown
Risk Indicators Present (Y/N)	Dropdown
Notes Summary	Text
Follow-Up Required (Y/N)	Dropdown

TAB 3: Issues Tracker

Each row = one issue identified

Field	Type
Issue ID	Auto
Company ID	Lookup
Date Identified	Date
Issue Category	Workforce / Infrastructure / Permitting / Utilities / Tax / Other
Issue Description	Text
Assigned To	Dropdown
Status	Open / In Progress / Closed
Date Assigned	Date
Date Resolved	Date
Resolution Time (Days)	Formula
Escalated (Y/N)	Dropdown
Notes	Text

TAB 4: Expansion Pipeline

Each row = one expansion lead

Field	Type
Project ID	Auto
Company ID	Lookup
Date Identified	Date
Expansion Type	Jobs / Capital / Facility / Automation
Estimated Jobs Created	Number
Estimated Jobs Retained	Number

Field	Type
Estimated Capital Investment	Currency
Stage	Lead / Active / Committed / Closed
Incentive Request (Y/N)	Dropdown
Outcome	Won / Lost / Pending
Announcement Date	Date

TAB 5: Ambassador Activity

Field	Type
Ambassador Name	Text
Active Status	Yes/No
Visits Completed (Qtr)	Formula
Visits Completed (YTD)	Formula
Training Completed (Y/N)	Dropdown
Assigned Companies	Count
Satisfaction Rating	Optional survey

TAB 6: Quarterly Dashboard (Auto Calculated)

Use pivot tables pulling from other tabs.

Core Metrics to Calculate:

- Total Visits (Qtr & YTD)
- % of Tier 1 Companies Visited
- Expansion Leads Identified
- Jobs Retained (YTD)
- Jobs Created (YTD)
- Capital Investment Supported
- Issues Identified
- Avg Resolution Time
- % Issues Closed within 30 Days
- CEO Confidence Average
- Ambassador Participation Rate

Suggested Dashboard Layout

Section 1 – Activity

- Total Visits
- CEO-Level Meetings
- Ambassador-Led Visits

Section 2 – Outcomes

- Jobs Retained
- Jobs Created
- Capital Investment
- Projects in Pipeline

Section 3 – Performance

- Avg Resolution Time
- % Closed in 30 Days
- Risk Companies (High Risk Count)

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2 CRM DATA FIELD STRUCTURE FOR BRE TRACKING

This structure works for systems like Salesforce, HubSpot, ZoomProspector, Bludot, etc.

CORE OBJECTS (Modules)

1. Companies
2. Contacts
3. Visits (Custom Object)
4. Issues (Custom Object)
5. Projects / Expansions
6. Ambassadors (Custom Object)

A. COMPANY RECORD FIELDS

Basic Fields

- Company Name
- NAICS Code
- Industry Cluster
- Tier Level
- Total Employees
- Facility Size
- Headquarters (Y/N)
- Risk Score (Auto-calculated field)
- Confidence Index (Rolling average)

BRE-Specific Fields

- Last Visit Date
- Next Scheduled Visit
- Workforce Risk Flag
- Relocation Risk Flag
- Automation Risk Flag
- Supply Chain Risk Flag
- Expansion Probability (Low/Medium/High)

B. VISIT OBJECT (Linked to Company)

Each visit record should include:

- Visit Date
- Visit Type
- Conducted By
- Ambassador Involved (Y/N)
- CEO Confidence Score (1–5)
- Top 3 Issues Identified (Multi-select)
- Expansion Discussed (Y/N)
- Risk Signals Present (Checklist)
- Summary Notes
- Follow-Up Required (Y/N)

Automation Suggestion:
If “Follow-Up Required = Yes” → Auto-create Issue record.

C. ISSUE OBJECT

- Company
- Issue Category
- Priority Level (Low/Medium/High)
- Date Identified
- Assigned Staff
- Status
- Escalation Flag
- Date Closed
- Resolution Time (Auto-calculated)

Automation Suggestion:
If open > 30 days → Auto alert.

D. EXPANSION / PROJECT OBJECT

- Company
- Project Type
- Estimated Jobs Created
- Estimated Jobs Retained
- Estimated Capital Investment
- Incentive Request
- Stage
- Probability %
- Expected Decision Date
- Outcome

Automation:
Pipeline value auto-calculates total projected capital investment.

E. AMBASSADOR OBJECT

- Name
- Industry Expertise
- Assigned Companies
- Visits Completed (Auto-count)
- Training Completed
- Active Status

Advanced CRM Calculated KPIs

You can configure dashboards to auto-calculate:

- % Target Companies Visited (Rolling 12 Months)
- Avg CEO Confidence by Sector
- Issue Volume by Category
- Resolution Time Trend
- Risk Heat Map by Industry
- Expansion Pipeline Value
- Ambassador Productivity Score

Recommended Reporting Cadence

Monthly (Internal)

- Visits completed
- Open issues
- Expansion leads

Quarterly (Board)

- Jobs retained
- Capital investment
- Resolution performance
- Risk assessment

Semi-Annual (City Council)

- Total companies engaged
- Expansion wins
- Economic impact

If you would like next, I can provide:

- A KPI maturity model (Level 1–5 BRE sophistication)
- A risk scoring formula model
- A CEO confidence survey template
- Or a BRE playbook formatted for board adoption

Let me know which direction would be most helpful.

CEO confidence survey

Below is a structured, executive-level **CEO Confidence Survey** designed specifically for a Business Retention & Expansion (BRE) program. It is built to generate measurable, board-reportable data while maintaining executive credibility.

You can deploy this digitally (SurveyMonkey, Qualtrics, CRM form) or use it during structured BRE visits.

BUSINESS RETENTION & EXPANSION

CEO Confidence Survey

Purpose:
To assess business climate confidence, expansion outlook, and risk indicators in order to strengthen long-term economic resilience.

Confidential – Results reported in aggregate only

Section 1: Overall Business Climate Confidence

1. How confident are you in the local business climate over the next 12 months?
(Scale 1–5)

1 = Very Uncertain
2 = Somewhat Uncertain
3 = Neutral
4 = Confident
5 = Very Confident

KPI: CEO Confidence Index (Average Score)

2. Compared to 12 months ago, your outlook is:
☐ Significantly More Positive
☐ Slightly More Positive
☐ About the Same
☐ Slightly Less Positive
☐ Significantly Less Positive

KPI: % Reporting Improved Outlook

Section 2: Expansion & Growth Outlook

3. Are you planning any of the following in the next 12–24 months?
(Check all that apply)

☐ Increase employment
☐ Capital investment
☐ Facility expansion
☐ Automation/technology investment
☐ New product/service line
☐ Relocation of operations
☐ No expansion planned

KPIs:

- % Planning Expansion
- % Planning Capital Investment
- Early Relocation Signals

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4. If expanding, what is your expected timeline?
☐ 0–6 months
☐ 6–12 months
☐ 12–24 months
☐ Undetermined

Section 3: Workforce & Talent

5. How would you rate your ability to find qualified workers?
1 = Very Difficult
2 = Difficult
3 = Moderate
4 = Manageable
5 = No Difficulty

KPI: Workforce Constraint Index

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6. Are workforce shortages limiting your growth?
☐ Yes – Significantly
☐ Yes – Somewhat
☐ Not Currently
☐ No

Section 4: Infrastructure & Regulatory Environment

7. Are infrastructure factors limiting your operations?
(Check all that apply)

☐ Utilities
☐ Transportation/logistics
☐ Broadband
☐ Site constraints
☐ Permitting timelines
☐ None

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8. How would you rate your experience working with local government?
1 = Poor
2 = Fair
3 = Adequate
4 = Good
5 = Excellent

KPI: Government Responsiveness Score

Section 5: Risk Indicators

9. Have you considered relocating any portion of your operations in the past 12 months?
☐ Yes
☐ No

If yes (optional): What primary factors influenced this consideration?

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10. What are the top three risks to your company in the next 24 months?
(Open response)

Section 6: Engagement & Support

11. How valuable are BRE visits and outreach from our organization?
1 = Not Valuable
2 = Slightly Valuable
3 = Moderately Valuable
4 = Valuable
5 = Highly Valuable

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12. What additional support would be most helpful?
(Open response)

Dashboard Metrics Derived from Survey

From this survey, you can generate:

- CEO Confidence Index (Average Qtr & Trendline)
- % Planning Expansion
- % Reporting Workforce Constraint

- % Experiencing Regulatory Barriers
- % Considering Relocation (Risk Flag)
- Government Responsiveness Score
- BRE Value Rating

Suggested Reporting Format (Board-Level)

Quarterly Snapshot:

- CEO Confidence: 4.1 (+0.3 from Q2)
- 62% Planning Expansion
- 48% Reporting Workforce Constraints
- 9% Considering Relocation
- Avg Gov't Responsiveness: 4.3
- BRE Program Value Rating: 4.5

Best Practice Deployment

• Conduct during executive-level visits
• Limit to 5–7 minutes
• Ensure confidentiality
• Report in aggregate only
• Track rolling 12-month trend

Response 3

The purpose of this BR&E visitation program is to create a structured, proactive system for engaging existing businesses, identifying challenges early, strengthening relationships, and supporting long-term business retention and expansion.

Rather than relying on informal conversations or reactive responses, this program establishes a repeatable process for outreach, documentation, analysis, and follow-through. The goal is to ensure that business input consistently informs local decision-making and that businesses view the organization as a responsive and reliable partner.

Program Framework and Design
1. Continuous Engagement Model

- This program will operate using a continuous visitation model, allowing for manageable outreach and sustained relationship-building. A continuous model ensures that:
- Visits are scheduled regularly throughout the year
- Data collection remains steady and organized
- Issues are identified before they become urgent
- Trends can be monitored over time

The program will begin with a defined group of businesses across key sectors and gradually expand.

2. Organizational Inputs and Commitments

- Successful implementation requires clear internal alignment and defined responsibilities.
- Core Inputs Include:
- Dedicated staff coordination and scheduling
- Leadership support and visible endorsement
- Collaboration with utilities, workforce partners, and relevant City departments
- A standardized visitation questionnaire
- A secure tracking and reporting system
- A documented follow-up protocol

Confidentiality, consistency, and accountability will guide all interactions. Businesses will be informed that their feedback is valued and that realistic expectations will be communicated regarding what can and cannot be addressed.

3. Visitation Process and Workflow

The BR&E process will follow a structured workflow:

Step 1: Target Identification
Select businesses representing various sizes and sectors to ensure a balanced understanding of the local economy.

Step 2: Scheduling and Outreach
Initiate contact with a clear explanation of the program's purpose and confidentiality standards.

Step 3: Structured Visit
Use a standardized set of questions addressing:

- Workforce conditions

- Operational challenges
- Infrastructure or regulatory issues
- Future expansion plans
- Business outlook

Step 4: Documentation and Categorization
Responses will be entered into a tracking system and categorized (workforce, infrastructure, regulatory, business confidence, etc.).

Step 5: Follow-Up and Referral
Issues requiring action will be assigned to appropriate departments or partners. Follow-up communication will be documented.

Step 6: Reporting and Trend Analysis
Recurring themes will be summarized and prepared for leadership review.

- Volunteer visitors may be integrated in later phases once internal systems are fully operational and reporting mechanisms are established.
- Integration of Key Course Elements
- Strengthening Social Capital
- This program intentionally builds social capital by:
- Establishing consistent, face-to-face communication
- Demonstrating responsiveness and follow-through
- Connecting businesses to relevant resources
- Improving coordination between departments
- Trust will be built through reliability, transparency, and steady engagement over time.
- Reporting and Presentations

- Quarterly summary reports will be prepared for:
- City leadership
- Economic development boards or advisory groups
- Key partner organizations
- Because the model is continuous, reports will emphasize:
- Number of visits completed
- Emerging trends and recurring concerns
- Notable success stories
- Follow-up actions taken

Data will be translated into information through categorized summaries, concise narratives, and clear identification of patterns that may require policy or operational adjustments.

Expected Outcomes
Short-Term

- Improved understanding of current business conditions

- Increased communication between businesses and local leadership
- Early identification of emerging challenges

Medium-Term
- More coordinated interdepartmental responses
- Targeted adjustments to policies or procedures
- Strengthened relationships and increased trust

Long-Term
- Higher business confidence
- Increased likelihood of retention and local expansion
- A more resilient and connected business environment

First 90 Days Implementation Plan
- A structured rollout ensures momentum and clarity.

Days 1–30: Program Foundation
- Finalize visitation questionnaire
- Develop tracking and documentation system
- Identify initial target business list
- Communicate program purpose to leadership and internal departments
- Establish follow-up protocol and departmental points of contact

Days 31–60: Initial Outreach and Visits
- Begin scheduling and conducting visits
- Complete initial round of 8–15 business visits
- Document and categorize responses
- Initiate early follow-up actions
- Identify emerging themes

Days 61–90: Evaluation and Reporting
- Conduct additional visits to broaden representation
- Prepare first summary report outlining participation levels, themes, and actions taken
- Present findings to leadership and discuss recommended next steps
- Adjust processes as needed based on feedback

By the end of the first 90 days, the program will be operational, documented, and producing actionable information.
- Sustainability and Continuous Improvement
- The program will be reviewed semi-annually to assess:
- Participation levels
- Responsiveness to identified concerns
- Emerging economic trends

- Effectiveness of follow-up procedures
- Adjustments will be made to improve efficiency, outreach coverage, and impact.

Conclusion

This BR&E visitation program provides a structured, accountable, and implementable framework for engaging existing businesses in a consistent and strategic manner. The program integrates relationship-building, organized data collection, meaningful reporting, and measurable follow-through.

The operational structure is defined, the first 90 days are planned, and the evaluation process is established. This plan is prepared for implementation and positioned to strengthen business retention and expansion through sustained engagement and informed decision-making.

Response 4

Preparation is a crucial part of the visitation process. Creating a small packet to leave with business owners and/or management that consists of contact information and resources, for example grant applications, list of contacts for the city, workforce, and chamber of commerce.

Make a list of businesses to call and request an appointment to meet and participate in a survey. Schedule on a weekly basis for BR&E visits.

Preparations for visits include packet and survey. Take a planner for notes and make plans to return for a follow-up visit. Take a list of who will be visited on that day.

If possible, recruit a colleague to help with the survey and make sure they are prepared for the visit.

When arriving for BR&E visit be prepared with all items. Share appreciation with the business owner/manager and go over what to expect for the survey portion of the visit. Make sure that everyone attending the visit is introduced. Start the survey and once completed make sure to thank them for their time and participation. Leave them a packet and explain content. Once you leave the meeting plan a return follow-up visit in your calendar.

After the visits for the day are completed return and make go over notes and enter any pertinent notes. There will be tasks to complete in the following days depending on the information gathered at each meeting.

CRM updates should be entered and at the end of the month have a report of information gathered for presentation purposes. This could include any graphs of information if needed.

Plan on having a relationship and get to know businesses and the community by being present and visible on a regular basis. Problem solving and connecting business with business or resources.

The course was informative, in particular Section 3. We are staff members of one at the MDD BR&E program. The need for reports, strategic planning, collection of data and presentations have not yet been integrated, however it will be part of the program moving forward.

Response 5

Response 6
