



BUSINESS RETENTION & EXPANSION

Strategic Expansion

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PURPOSE OF THE PLANNING EXERCISE

- Action Team agencies and members are identified
- The Operations Team collaborates with the Action Team to review research, identify needs, develop implementation plans for short-term issues, and set priorities on longer-term projects
- Recommendations are provided to the Management Team and Stakeholders for approval and resource allocation



■ ACTION PLANNING INITIATION

- What are the key issue(s) that should be addressed?
 - Key issues can be gleaned from the response database and the written research report
 - Relate these issues to the community profile – how does this issue affect the community's economic health?
- What data from the survey shows this?
 - The BR&E process is a data-driven process
 - Make sure that any conclusions/recommendations that are drawn can be supported by data



■ ACTION PLANNING INITIATION

- How are these issues addressed by the Action Team?
 - A key component is the knowledge of potential Action Team members and the scope of their missions
 - Similar to the flag review session, develop an asset map of local and non-local technical assistance, education, and service providers to facilitate this process. This will provide an outline for assembling the comprehensive Action Team
 - Most issues can be broken into more than one part; match each part with the mission of specific Action Team members
 - Designate specific Action Team sub-groups to address specific issues



PLANNING MEETING NEEDS

In order to develop an effective asset map of potential Action Team members and thorough issue identification, the Operations Team will need the following:

- One copy of research report or CRM database output for each person
- Slides of key graphs
- Community profile
- Post-it Note large charts
- Report writer(s) and/or a skilled CRM database operator
- Facilitator who will keep the process moving
- Recorder



TYPICAL PLANNING MEETING AGENDA

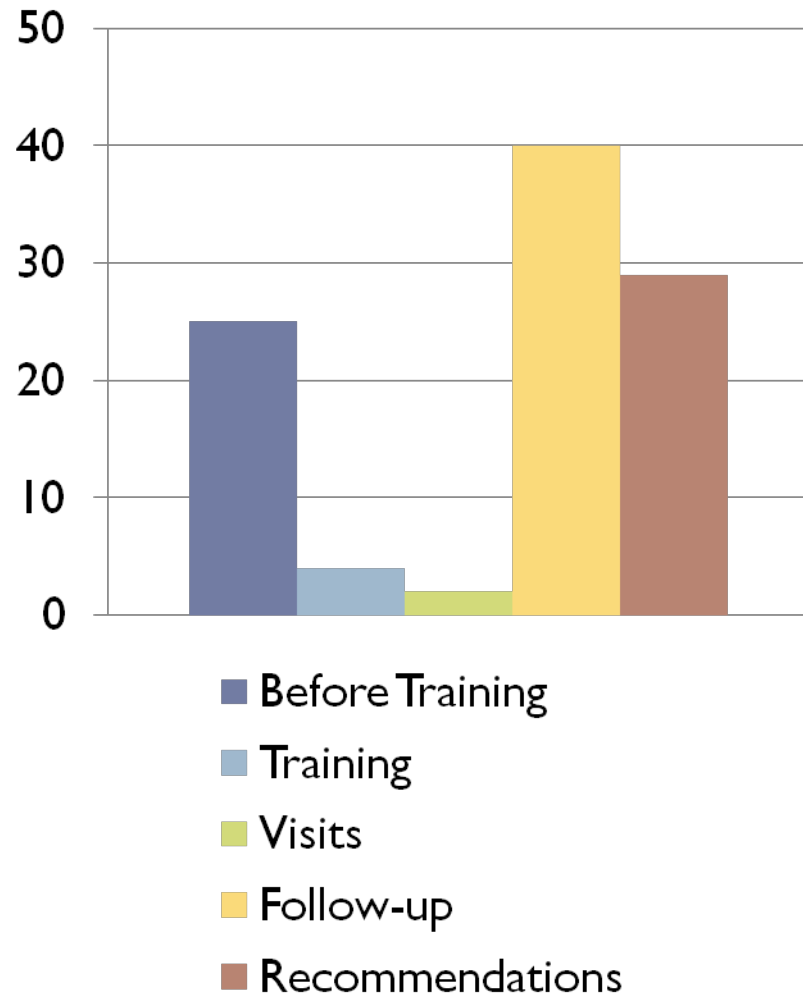
- Report on visited firm characteristics
- Research/survey results are examined to identify issues
- Issue components are identified and potential Action Team members are associated
- Issue and component prioritization
- Operations Team members take ownership for issues
- Recruitment/involvement of Action Team members
- Planning of future activities



■ ACTION PLANNING WORKSHEET

- What tasks will be carried out? Who on the Action Team is responsible for each task? When will the tasks be completed?
- Are there others outside the Action Team that need to be involved?
- Detailed suggestions on how to proceed.
- What members of the Action Team will be active for a particular issue?

TIME SPENT IN MOST SUCCESSFUL BR&E VISITATION PROGRAMS



- ▶ Most successful programs spend 40% of total time spent on immediate followup
- ▶ The least successful programs only spent 22% of total time on immediate follow-up

QUESTIONS





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