



BR|E

**COACH'S
PLAYBOOK**

Eric P. Canada

Elevating the Game

Please feel free to post this on your blog or e-mail it to whomever you believe would benefit from reading it.

**THANK
YOU**

Includes materials from Synchronist Business Information System® Launch Guide and other Blane, Canada resources.

Additional Business Retention and Expansion Resources are available on the Blane, Canada website: Publications <http://www.blanecanada.com>

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Business Retention and Expansion Resources are available on the Blane, Canada website: Publications <http://www.blanecanada.com>

- The Missing Link: A Vision for Retention and Expansion
- Rocketing Out of the Twilight Zone
- Untapped Potential: Business Retention in Portfolio Management
- Locked in the Twilight Zone: Business Retention Fails the Strategic Value Test! (Updated)
- Home Field Advantage: Positioning and Marketing an R&E Program
- Importance of Retention and Expansion
- Step-by-Step Business Retention Survey Evaluation
- BR|E: "Synergizing" Service Delivery, UNC Research Report
- Break the Habit: Branding Strategies for Business Retention

Not finding what you need? I probably have something in my library. Give me a call. Happy to discuss Business Retention and Expansion anytime and share what I have.

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Coach's Playbook

BR|E ELEVATING THE GAME

Forward

Elevating the game is largely dependent of managing the fundamentals effectively. Since Business Retention and Expansion (BR|E) is essentially learned on the job, the fundamentals can be elusive.

The Coach's Playbook originates from frequently asked BR|E program questions. Blane, Canada fields hundreds of questions from Synchronist Suite® software users and economic development professionals trying to launch or elevate a BR|E program. At Blane, Canada, we have made it our business to study BR|E, client relationship management (CRM), attraction marketing, and workforce development to discern professional and program best practices then, share those practices with our clients and the profession equally.

As the industry leader, Blane, Canada provides a spectrum of services and software products economic development professionals want to buy and competitors try to emulate. We train and provide software and services to the teams that manage

economic development programs to maximize return on investment (ROI): influence, visibility, and impact.

The Playbook series focuses on underutilized BR|E fundamentals and asks critical questions to help the economic development pro zero in on answers that matter. The Playbook is not an attempt to provide a detailed how-to book. The Playbook is not specific to Synchronist Suite®. It covers general principles that can be used by any development professional to “up their game” regardless of the style of their current BR|E program. The questions following each section are not exhaustive or prioritized. As you think about each Playbook question, others will come to mind. List your questions along with those provided and prioritize to suit your organization's agenda.

How to Use the Playbook

Use the Playbook as a source of best practices and a planning checklist. Check the headers against your program looking for gaps or weaknesses. As you notice opportunities to improve, review any notes provided and the questions. Add your own questions in the margins as you research these topics.

Elements of a Business Retention Expansion Program

The Business Retention and Expansion Program has six distinct components. Each component builds on other components to make a complete program. However, organizations can select from this menu to create their own approach to supporting the existing business community. Each program elevates the level of effort required by the organization and potential return on investment for that effort. (See figure p. 5)

1: Responsive/Reactive Retention

The lowest level of effort or a minimalist program is Responsive or Reactive. Essentially, Responsive Retention is having someone available and capable to respond if a company executive calls with a problem. Every economic development organization is responsive when asked for help. While the responses are not always successful, all try to help clients on request.

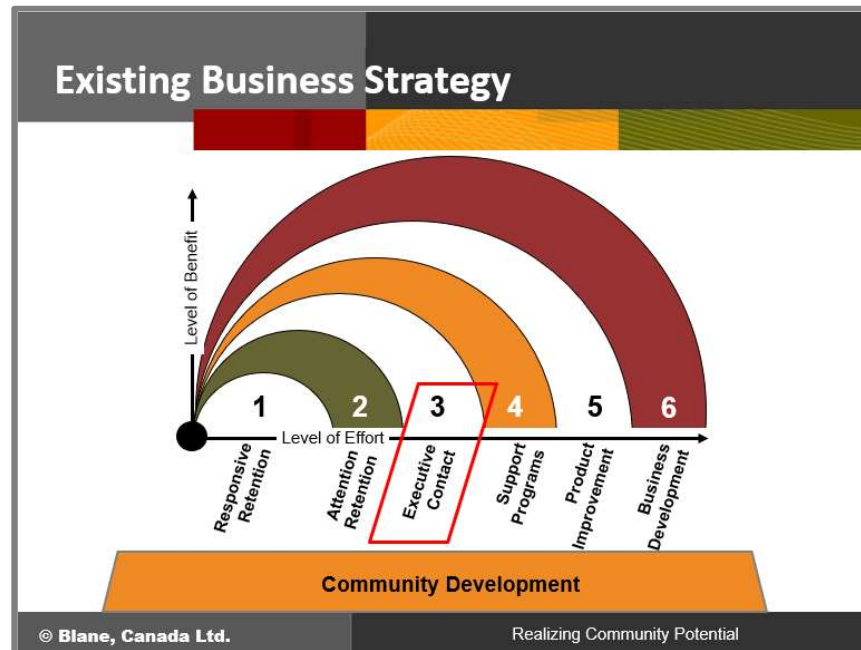
1. Who is the designated response manager?
2. What preparations should be made to speed responses and improve the success rate?
3. Have individual partners been identified to help address specific problems?

2: Attention Retention

Some organizations practice Attention Retention by creating awareness for existing employers. Manufacturer's Day is one example. Cluster initiatives such as Life Science Institute, Manufacturer's Network, or a Tech Council bring attention to

important sub groups. Posting Top Employers on the web site or a business directory are popular tactics. Product displays, recognition of significant anniversaries, or award programs like employer of the year, fastest growing companies, newsletter articles, are just a few examples of shining a positive light on existing employers.

1. Is there a desire to pursue attention retention?
2. Will there be a budget to support higher level efforts?



3: Executive Interviews

The first reaction to BR|E is a business visitation program. Made popular in the 70's business visitation programs serve a number of purposes: gather information from business executives, identify common problems, find companies with plans to expand, identify opportunities to provide assistance to companies with a specific problem, and form the basis of a working relationship. The BR|E interview is normally a one-on-one meeting between an economic development representative and a company executive. As noted, some meetings are extremely casual conversations that touch on specific topics while others are more structured with a series of questions used to ensure consistent information from each interview. (See Locked in the Twilight Zone: Business Retention Fails the Strategic Value Test, page ii)

1. What is the ultimate goal of the program? (see Goals)
2. Will the program be informal or formal?
 - a. Will the conversation be informal and unstructured and just touch on a series of topics, e.g. workforce, growth plans, etc.
 - b. Will the conversation be formal, guided by a specific set of questions with recorded responses?
 - c. Will responses be analyzed, reported, and distributed outside the organization?
 - d. Will the interview document the current situation or work to predict future potential or both?

4: Support Programs

Business Support Programs can include services or financial assistance. Economic gardening, internships, government procurement, international trade, incubators, Small Business Development Center, Main Street, and mentoring are examples of programs designed and operated to help local businesses thrive. Programs can be designed for individual companies or groups of companies. A tech council or a Manufacturer's Network are examples of group programs. Support programs come with a price tag. Staff and operating budgets can be difficult to fund as independent programs. As a result, support programs are often integrated into an existing economic development organization, chamber of commerce, community college, or government to minimize costs.

1. What support programs are already available in the community?
2. Are there specific gaps that should be addressed?
3. How will the proposed program be funded?

5: Product Improvement

Product Improvement can be anything from infrastructure (roads, utility access) to real estate development (business park, incubator, co-working space) to workforce development (employee recruitment, jobs board, campus recruitment), to business climate (regulatory change, leadership education). Improved community livability and/or culture are also popular community improvement initiatives.

1. How is product improvement responsibility distributed in the community?
2. Are there specific gaps that should be addressed?

6: Business Development

Business development is all about increasing sales for existing businesses. From the lowest level, business development is executive networking or matchmaking events as well as social media blasts promoting sales, events, or the services of a specific company. At another level, business development overlaps with support programs. Staffing requires specialized expertise such as government procurement, export trade, or research services such as target market research to help identify new sales opportunities. Because of the specialized skill requirements and associated costs, business development programs are the least common existing business strategy. Business development is much more common in entrepreneurial and main street programs. There are very few examples in primary sector engagement.

1. Who is your target client?
2. Is there a way to help them increase sales?
3. Are other organizations working with these or other companies to increase their sales?
4. Is there an opportunity/need to create a new program to help boost sales of existing companies?

Informal vs. Formal

The decision between an Informal or Formal program lurks behind each of these six elements. This decision introduces the variability that makes BR|E program look quite different. Business referrals (#6) can occur spontaneously or be the result of a planned, organized program such as a shop local, business referral, or a manufacturing accelerator program. Interviews (#5) can be loosely formed around a series of topics or formalized into a

structured interview form that has been carefully prepared to explore specific issues and provide predictive insight. Responses to assistance requests (#1) can be managed as they occur by staff (informal) or referred to members of a trained team of partners with special expertise and skills (formal).

As a result, formal components will often be mixed with informal parts. For example, a BR|E program can have a goal of 15 interviews a month and a set of 3 retired executives conducting interviews. However, each meeting can be an informal, unstructured conversation different for each company visited with no written documentation of the conversation. Is it formal or informal? Or, a formal workforce development program can be created as a result of concerns heard during informal executive interviews.

Informal and formal are mirrored twins. Two organizations with executive interview programs will have entirely different programs and outcomes if one is informal and the other formal. Everything changes with this choice. The following table highlights the important differences.

Characteristics of Informal vs. Formal Program Design		
Characteristic	Informal	Formal
Planning	Minimal	Significant
Continuity	No	Yes
Structure	Little	Detailed
Responses	Shape one opinion	Provide facts
Results	Qualitative	Quantitative
Reporting	Limited	Detailed
Benchmark	None	Maybe
Outcomes	Inconsistent	Consistent
Evaluation criteria	Minimal	Detailed
Success Measure	Count	Impact

The critical difference for BR|E between informal and formal is experienced in results, reporting, benchmarks, and outcomes. These critical differences were explored in the findings of the research report, *The Missing Link: A Vision for BR|E*. This research by Blane, Canada investigated the practice of BR|E and real-world results and outcomes specifically.

In the debate over informal vs. formal, advantage or disadvantage is determined by the goals of the program. If the BR|E goal is to influence decision-making on important changes needed in the community, a formal interview will be more impactful. If the goal is to quickly meet as many executives as possible, an informal program will have significant advantages. If the goal is to maximize the impact on the greatest number of manufacturing companies, then, a formal manufacturer's council (#3) could have the advantage.

1. What are the BR|E goals?
2. What resources are available to support work toward these goals?
3. Which is more important, speed to launch, continuity, or impact?
4. How do you prioritize: a) documenting problems, b) anticipating new problems, c) understanding each company's potential, d) demonstrating value added (company and leadership), e) initiating a possible relationship with the executive?
5. How does the BR|E program fit in the organization's funding strategy?

Building Blocks

Each of these six elements are building blocks for a complete business retention program. While any can stand alone, they are more impactful when combined in a thoughtful existing business strategy. There will always be a need to be prepared to respond or react to a specific company needs. A phone call or a visit can trigger a response from the development

organization to assemble a team of capable problem solvers. However, combining a prepared (formal) response team with a structured outreach program makes the BR|E program stronger by helping avoid schedule collapse when staff is drawn into response mode to solve a company's problem forcing executive interviews to be put on hold. Schedule collapse is a common problem, especially for small organizations. Schedule collapse also contributes to short-cutting that diminishes the impact of the BR|E program.

The questions to consider first are:

1. What elements of an existing business program are important for our community and the organizations?
2. What components are most important to the community's future?
3. What components are most attractive to investors?
4. How will the components of the strategy be funded and staffed? General revenue funds, grants or program specific funding, or a broad-based funding campaign.
5. Are elements of the existing business strategy better suited for other organizations in the community?
6. How can elements be coordinated to maximize the potential of each component?
7. Will the program be structured and formal or informal with little or no structure?

Four Corners

There is no perfect time to schedule business retention visits. There will be times we walk into a company interview and find out we are too late. The company has already decided against a new product line – a \$8M investment – the community did not know was being considered. In other cases, we arrive for an interview and hear everything is great. Then, a few weeks later,

the company executives announce the company has been sold to a German company. When we pick the time, the law of averages dictates only a few will be timely because of issues company executives are dealing with. More often than not, we will be too early or too late. For this reason, it is essential to create alert mechanisms to supplement your visit schedule.

The executive interview is only one of the four alert mechanisms in a comprehensive BR|E program. These four alerts comprise the economic development organization's intake mechanism for identifying companies with opportunities and challenges in a timely manner.

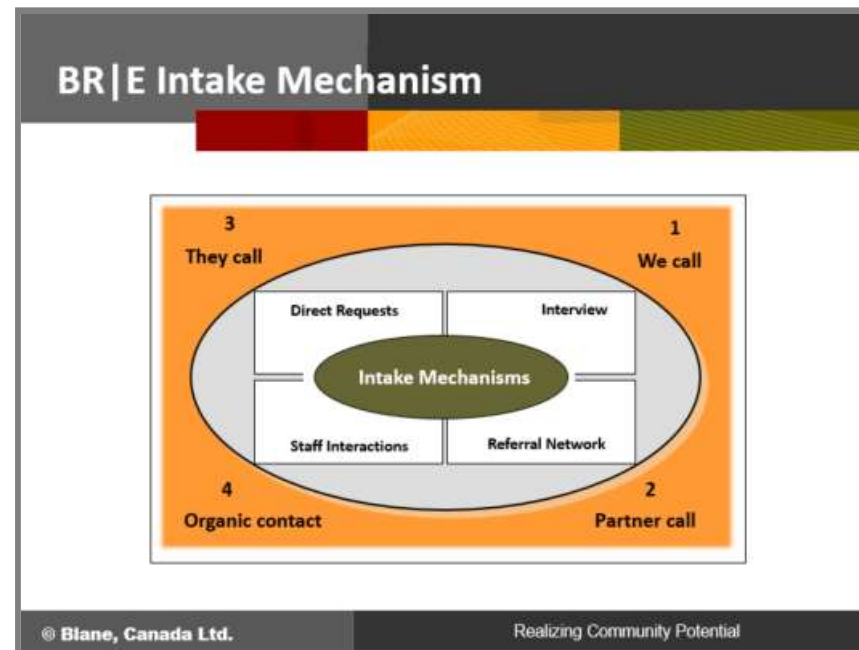
1: We Call

The development professional schedules time with the executive for a conversation or interview. These meetings range from a casual conversation to structured interviews with specific goals.

We Call is what most economic development professionals think about when BR|E is mentioned. However, it is only one intake mechanism. And, it is the least likely to make a connection at the "right" time. We Call (interviewing) receives the most attention for training as well as written materials. Several sections noted below drill

into important issues for the We Call portion of the program. (See Players, Positions, and Responsibilities, Program Identification, and Goals: Long-term, Short-term).

2: Partner Call



Partner Call is the active identification of company specific opportunities and challenges through members of a referral network. The referral team can be narrow or broad, but it requires consistent prodding to be productive.

Even the best members of our network – Board and Committee members – forget to pass along useful information unless reminded frequently. After all, serving as a listening post is not their primary job.

1. Is the partner network formal or informal?
2. Do members of your network know they are to be an active part of your alert system?
3. Do members of your network have a clear understanding (specific, concrete examples work best) of what specific situations you want to be alerted of?
4. How do you refresh, recharge, and remind your network partners you are counting on their assistance?
5. Should the network be expanded beyond the obvious Board and Committee members to include: government officials that interact with businesses as a result of their job; business executives with strong networks in the community or specialized knowledge (attorneys, bankers, accountants, real estate brokers), utility key account managers, etc.

3: They Call

They Call is the company executive calling the economic development professional when in need of help. They Call is highly reliant on relationships, references, and visibility. Personal interactions and marketing to the existing business community – not just investors or members – are essential ingredients to stimulate in-bound calls from company executives.

1. What marketing tools, techniques, and tactics are used to make targeted business executives aware of the program?
2. Is there a budget for marketing the program beyond the members/investors?
3. If a business executive searched your website for your support services and success stories, would they be clearly identifiable? Will your direct contact info be found?

4. Who is the executive with a problem likely to call in the community? Is this person part of your referral network?
5. Has an effort been made to ensure the staff of all organization(s) that could be called knows to provide a referral to you? Will they alert you directly of the opportunity/challenge?

4: Organic Contact

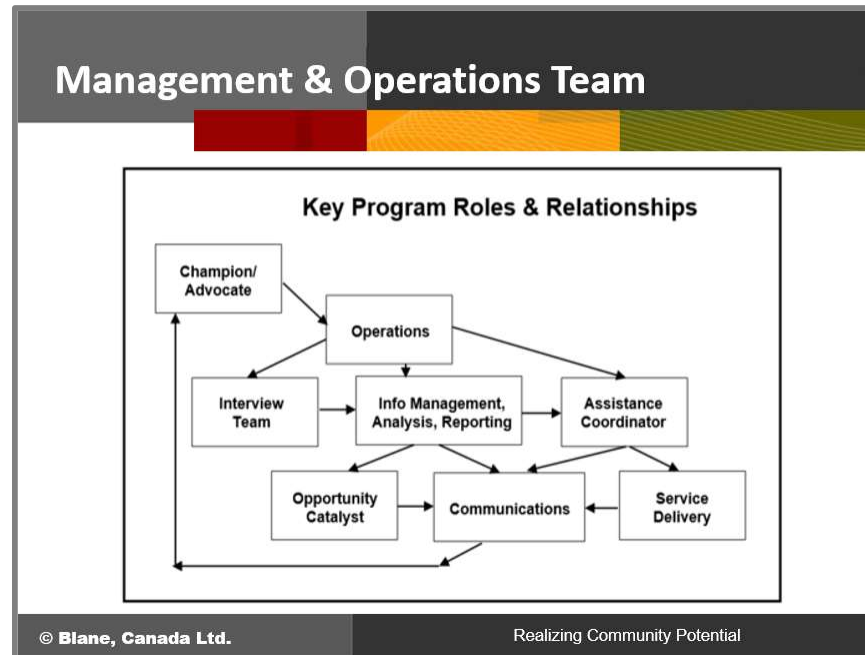
Organic Contact is the interaction of staff with business executives in the community. These interactions create serendipitous opportunities to discover company opportunities and challenges. The discovery may be a direct contact with the company or with someone familiar with the company. When evaluating marketing programs, it is surprising how often a general request that could signal an opportunity is not passed along to the sales team. We have been amazed at how often information requests are fulfilled and once completed, the request is trashed with no thought as to its potential value. The same is true in business retention. Internal training using clear examples of the type of call requests that should be flagged are just one more piece of a comprehensive strategy.

1. Who is asking for information? Is the caller asked how the information will be used? Are they asked if they would like to talk to a member of the client solutions team?
2. Why would a caller ask that question?
3. Who should know they asked that question?
4. Has everyone on staff been made aware of the business indicators of a company with a challenge or an opportunity they might hear in a conversation or meeting?
5. When was staff last "reminded" of those indicators?
6. Do they know of the proper procedure for communicating their observation?

Players, Positions, and Responsibilities

A successful BR|E program is multi-faceted. There are many important roles. Each has its purpose and requirements. The greatest failure in developing successful BR|E programs is underestimating the resource requirements shown in the Figure: Management & Operations Team. As roles and positions are missed, ignored, or consolidated the value of the BR|E program deteriorates quickly. One individual can theoretically fill all of these positions; however, the combined weight of the responsibilities will diminish the potential results and program value. Also, in cases like the Champion/Advocate role, the program manager typically does not have the community standing or independence to give advocacy an air of authority.

Blane, Canada takes a long view on the importance of the interview. The interview should maximize the value of time spent with each executive. The interview should position the interviewer as a thoughtful partner. In addition to understanding pain points (frustrations and challenges) and expansion plans, we work to understand the company as an economic asset for the community. This means questions are critically important, capturing information is essential, and analysis gives us influence well beyond a few facts or an informed opinion. Anything less wastes everyone's time. This interview strategy takes time. Therefore, if the person scheduling and completing interviews is responsible for many or all of the other tasks important work will be missed due to lack of time and attention. Hence the importance of filling positions with partners, Board members, and/or volunteers.



Champion/Advocate

The Champion/Advocate is the person who is out front telling why business retention is important to both the community and to business. The Champion/Advocate is the public face of the program, the spokesperson representing the program in the community. The Champion/Advocate keeps the program in front of the media and community organizations. The Champion also encourages business executives to participate when called.

The Champion/Advocate can be a role shared by the economic development organizations chief executive and a business person. Having a business executive in the Champion/Advocate role adds credibility to the program that staff cannot deliver.

1. Who has the credibility and authority to serve as the program's champion?
2. How will the champion be used to create awareness?
3. Can the champion build partnership opportunities?
4. How can program results be used to attraction attention (media, leadership, investors/members, existing business executives)?
5. Can the champion advocate for the use of results with outside organizations?
6. Can the champion push findings and results into discussions related to policy and resource allocation decisions inside and outside the organization?

Operations

The Operation Director makes sure everyone knows their role and is prepared to execute it. If training is needed, the Operations Director arranges training. The Operations Director can recruit partners to help conduct executive interviews. The Operations Director can recruit business executive to help on the Response Team or an educator to serve on the Information Management team. The Operations Director makes sure the visit goal is met on-time and within budget.

1. Who will coordinate interview scheduling?
2. Who will coordinate staff & partner /volunteer scheduling?
3. If used, how will partners/volunteer be recruited?
4. If used, who will train and motivate partners/volunteers to complete their assigned interviews.
5. Who will manage the information flowing from interviews?
6. Who will be responsible for interview quality control: data input, data, analysis, etc.?

Interviewer

The interviewer is the person or team of individuals responsible for meeting with executives and conducting the meeting, conversation or interview. With the growth of professional economic development staffing, interviewing has shifted more to a staff responsibility except for the smallest communities who still rely on volunteers to manage programs. In addition to conducting the interviews, the interviewer is normally responsible for capturing information if required by the program.

1. Will interviewers be limited to staff or include partners or even volunteers?
2. What training will be needed to prepare interviewers?
3. Will the interviewers go in teams or individually?
4. How many interviews will be conducted by each interviewer over what period of time?

Information Management

The Information Manager is responsible for making sure information coming from interviews is captured in a form that will make it easy to analyze and use for decision-making. The Information Manager reviews and analyzes the information on a regular basis. The Information Manager prepares internal reports for management or gathers information for a public report for the Communications Coordinator. The information manager watches for trends in the information to pass that information along to the Communications Coordinator or the Assistance Coordinator. For example, if a cluster of electrical service problems are noticed in one area of the community, who should be alerted?

1. Who will be responsible for gathering and maintaining background information on existing employers to be interviewed?
2. Who will convert raw data into usable information?

3. Who will package and present info for varied audiences?
4. Who will explore new ways to use existing data?
5. How will information be transitioned over time and staff changes?

Communications

The Communications Coordinator is looking for the success stories, the quotable quotes or testimonials that put a face on the program and its impact. The Communications Coordinator makes sure the Champion/Advocate is armed with the all the latest success stories. The Communications Coordinator is the energy behind marketing the program to business as well as the public.

The Communications Coordinator is in touch in the community to be aware of issues being debated by other organizations in search of ways to apply the BR|E interview findings. For example, can BR|E findings be used in the Chamber's strategic planning process to highlight community development issues for the Chamber's consideration. If the Airport Board is considering a survey of businesses on airline passenger service, can the EDC collect that information through the interview process for the Airport Board for a fee?

1. Who will feed success stories to advocate, operations, communications?
2. Who will push findings, results, and opportunities out to existing employers?
3. Who will share information inside the organization as well as the community?

Assistance Coordinator

As assistance or service requests come in through the interviews, the Assistance Coordinator makes sure they are assigned and someone is responsible for helping each client gets the help needed. If special expertise is needed to solve a problem, the Assistance Coordinator is

responsible for finding an expert to help. If request fulfillment is beginning to age, the Assistance Coordinator works to identify the cause of the delays and how it can be resolved. The Assistance Coordinator deals with the problems of individual companies and delivering solutions.

1. What is needed?
2. Who can help?
3. How will they be informed?
4. When there's a gap, who follows-up?
5. Who will follow-up to make sure fulfillment was completed and the client is satisfied?

Opportunity Catalyst

The Opportunity Catalyst is the individual who is looking through the data coming in from interviews in search of opportunities. Can a company with an interest in selling in Europe be connected to area companies already selling there? If several companies are trying to fill engineering positions, can a resume exchange be set up to share applicants that do not work for one company with other companies needing engineers? The Opportunity Catalyst can look at opportunities with specific companies or opportunities for groups of companies.

1. What skills are required to review interview data to identify business opportunities?
2. Who will fill the role of the opportunity watcher?
3. What is the business opportunity?
4. Partner opportunities?
5. Joint venture potential?
6. Market opportunity?
7. Is there cluster potential?

Response Team

The Response Team is the collection of individuals assembled by the Assistance Coordinator to address client problems uncovered during interviews or when a client calls the development organization. Response Team members can have a specific expertise like international trade or finance. Or, a Response Team member can be a gateway to individuals in an organization that deal with specific issues. For example, the economic development executive for a public utility can help identify the right person inside the utility to help resolve a power fluctuation issue for a company.

1. Who should be on the team?
2. How will service request fulfillment be coordinated?
3. Who will follow-up to make sure response team members are working their assignments and completing them?
4. How will individual requests be tracking to completion?
5. How with service requests be reported?
6. How will service request be analyzed to identify trends or more significant problems?
7. Who will be responsible for analyzing service request information?
8. How will the value of services delivered be packaged for investors?

Minimum Coverage Requirements

Laid out in full view, these responsibilities are overwhelming. Most organizations do not have the bandwidth to cover all the bases. As a result, priorities are set based on resources and low priority roles are addressed periodically or kicked to the curb. The communications role is a good example. Generally, the communications role is believed to be most important during the launch of a new program and when results are reported. It is easy to conclude this will be manageable. But, this approach means real opportunities are missed to share success stories and create awareness. When resources are limited, championing a program becomes a bullet point instead of a public face. Programs without an active champion become invisible. Invisible programs – lack of communications and/or championing – fail to achieve wide recognition and seldom draw in new resources – volunteer time and money. Therefore, there are consequences to shortcutting roles.

In spite of the many roles, organizations have mounted successful programs with minimal staffing. I have done it. It can be done, but there are tradeoffs. Ultimately the goals will set the balance between quality – speed – cost.

1. What are the program goals?
2. Will the program run for a limited period of time or be on-going throughout the year?
3. How many companies must be reached?
4. Which of these roles will increase the potential of reaching the desired goals and producing the desired results?

You can have it good, fast, or cheap. Pick two.

Designing a BR|E program around a single staff person will fix cost. But, speed or quality will suffer.

Business Service Referrals

Every company depends on a collection of suppliers and service providers to support their operations. Companies often need local providers to maintain computer equipment or perform maintenance and repairs. Most are trusted partners. However, occasionally a company will need help finding a local provider for a special situation. For example, a company may host a delegation from China and need a translator with business experience. Networking to find providers is a common role for the economic developer and the Response Team.

1. What services are available from partner organizations for clients?
2. What service gaps are likely to need attention?
3. Will private sector service providers be considered for responses and if so, under what circumstances? (members/investors only, 3 best references, etc.)
4. How will private sector service delivery partners be identified?
5. How will private sector service options be limited if at all?
6. Is there an application process for private sector providers be required?
7. How will partners and providers service delivery be tracked to ensure the completion and client satisfaction?

Program Identification

Through years of use and abuse, BR|E has connotations that limit the effective deployment of a true existing business strategy. Therefore, defaulting to “Business Retention and Expansion” as a brand name for a local program is highly discouraged. The baggage seriously limits success potential for a new initiative.

When the BR|E brand is used, the impact of the brand is the individual's experience or interpretation of the individual words. For example, more often than not, the current economic developer is not the first economic developer to pass through the organization's board room. As a result, many Board members and community leaders have seen/heard this pitch before. We excitedly talk business retention and they hear "rear guard action" (defense). Their past experience defines the program's potential, not the current economic developer. If past experience has been bad – more retreading than edge cutting – then, the worst is assumed. Plus, new investors/leaders, struggle to understand our BR|E jargon. Frequently they walk away thinking it is just about visiting company executives. An obvious defensive play. Important but, not celebrated. Nothing new or exciting there.

8. How will the program be referred to?
9. What will be the program name? (Note: BR|E is not a program marketing brand)
10. Will there be a specific identity created for the program?
11. Has there been a prior BR|E program in the organization?
12. How will the program be differentiated from past programs?
13. Is a program goal to build a value-added brand for the community? (Refer to page ii, Breaking the Habit: Branding Strategies for Business Retention)

Program Goals

Short-Term Goal(s)

1. Touch key employers. (See Target Company Lists)
2. Identify and address company.
3. Identify and assist expansion opportunities.
4. Identify companies at risk and determine a course of action.

5. Assess each company's value and potential.

Long-Term Goal(s)

3. Drive ED resources (organizational, community, and partner) to economic opportunities.
4. Address community problems identified through the interview process.
5. Identify high value/growth companies.
6. Watch for business and economic trends.
7. Predict companies likely to have problems in the future.

Process

The following series of questions highlight key steps in the process of forming an advanced BR|E program. For example, choosing a group of company executives to interview requires some thought. The selection will depend on the purpose of the interview process as well as how you want to use the findings. With Blane, Canada's Synchronist interview design, we have four primary interview goals: 1) understand the company and their role in the community's economic future; 2) identify problems that are barriers to growth in the community; 3) assess risk of downsizing/leaving; and, 4) identify strengths and opportunities for marketing the community. Based on our research over the last 20 years, 55 percent of the value of the BR|E process is derived from the information collected during the process. At best, only 45 percent of the value - relationships, service delivery (including growth), and connecting clients to resources – is derived from the process of showing up.

Target Company List

1. Which companies should be interviewed?
2. Quality or quantity (see goals above)?
3. How will interview candidates be selected?
4. What company and contact info is available (internally and/or externally)?
5. How will company information be managed (company info as well as responses)?
6. How will additional background info be gathered?

Rapid Response Team

1. Who are the go to people who will work to resolve each company related issue uncovered?
2. Will response team members be given a program orientation?
3. Who will manage the longer-term challenges and tasks?
4. Who will manage the response team and insure task completion?
5. Who will share the outcome with those requesting assistance?

Executive Interviews

1. Who will conduct interviews? Staff? Extended staff? (Local, Regional, and State ED Partners)? Board Members? Volunteers?
2. Will interviews be conducted by an individual or teams of two?
3. Who will provide interviewer orientation, training?
4. What is the form of the campaign? Blitz (short, concentrated period of time)? Continuous (x visits per week or month)
5. When will the campaign begin?
6. How will scheduling be coordinated?
7. Will interview responses be recorded?
8. Who will manage the recording of interview responses?

9. Who will train the data input operator(s)?
10. Have reporting preferences and requirements been anticipated in question format?
11. Have reporting preferences and requirements been anticipated in data management?
12. Will interview flow allow time for prompt follow-up with individual clients for services needed?

Confidentiality

1. What is the confidentiality policy?
2. How will confidentiality be managed?
3. Who will have access to interview and assistance information?
4. Will interviewers be asked to sign a written confidentiality agreement?

Info Action

1. Will specific management report(s) be prepared periodically?
2. Who will be responsible for substantive communications and relationship building with existing employers?
3. How will findings, results, networking, and business opportunities be shared with existing employers, beyond those interviewed Who will be the media spokesperson?
4. Will a public report be created?
5. Will the report include recommendations?
6. Will a public report be distributed beyond the organization and participants?
7. Will special issue or topical report(s) be compiled?
8. Who will be responsible for moving recommendation from the report(s) into an action agenda?
9. Who will be responsible for reviewing information to identify and address community issues? Infrastructure? Business climate? Workforce? Quality of life?

10. Who will be responsible for reviewing information as it is collected looking for economic opportunities and threats? Company? Company Groups? Public Relations? Organizational? Partners?
11. How will findings be put into context? Are benchmarks available? (historic annual findings or external industrywide Key Performance Indicators)?

Funding

1. How will on-going operational costs be covered?
2. How will miscellaneous cost be covered?
3. Is there a budget for data?
4. Is part-time assistance for data collection or entry needed?
5. Is there a marketing budget to reach local executives?
6. Is there funding for a BR|E section for the website?
7. Has consideration been given to using the interview process to generate revenue?
8. How are the multiple value streams of the BR|E program being leveraged for funding?



Blane, Canada's team can help create a new BR|E program, evaluate an existing program, or train your team to improve results.

Call for details

630-462-9222

Blane, Canada Ltd.

Blane, Canada is recognized as an innovator in economic development.

Formed in 1983, Blane, Canada Ltd. works exclusively with economic development clients in North America. Our practice has a tight focus on five economic development disciplines:

- Economic development strategy
- Business attraction marketing
- Business retention and expansion
- Workforce strategy and talent
- Team collaboration on marketing and retention

The following are a few highlights of the innovations contributed by Blane, Canada's team.

- 1995 Published book *Economic Development: Marketing for Results!* Introducing the profession to business-to-business (B2B) marketing before B2B became fashionable and the concept of competitive intelligence for business retention.
- 1997 Created the first application of competitive intelligence in a BR|E executive interview.
- 1997 Created Synchronist Business Information System® to manage executive interview data.
- 1998 Published "Lost in the Twilight Zone: BR|E Fails the Strategic Value Test" whitepaper in Journal of Economic Development. Still one of the most downloaded and shared articles on business retention interview design.
- 2003 Synchronist 3.0 delivers online access.
- 2004 Formed the largest independent business retention incubator to conduct BR|E research, identify, and share best practices at the annual Synchronist Users' Forum.

Blane, Canada Ltd.:
Realizing Community
Potential

- 2007 Synchronist 4.0 launched browser based access.
- 2007 Created the first and only Key Performance Indicators (KPI) for business retention based on 32,000 executive interviews in the US and Canada.
- 2014 Launched successful Proof of Concept for an economic development based manufacturing sales network for the "forgotten" entrepreneurs.
- 2017 *Associates Guide to Economic Development*, our latest book, recognizes the importance of preparing the associates who have critical roles in economic development and the lack of training resources for them. Pending publication.

By narrowing our focus, engaging in direct client consulting, working with hundreds of active Synchronist clients, and conducting on-going R&D, we intensify the stimulation creating more opportunities to innovate. Finally, we have a rich history of published articles sharing what is learned with the profession. As a result, Blane, Canada Ltd. has consistently expanded the discussion and provided unmatched leadership.

Our focus is squarely on utilizing our experience and resources to drive results for our clients to Realize Community Potential.

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Call for a private, no
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630-462-9222

Synchronist Suite®

Synchronist Suite reinvented the business retention interview almost 20 years ago. Then, we built software to simplify data management. Now, 8 software generations later, Synchronist still provides unmatched tools and capabilities that give development professionals unprecedented insight into their local businesses as well as community economic potential. Insights that drive decision-making and resource allocation.

Synchronist has established exacting standards that have not been met by anyone else in the industry: Interview, Interview Validation, Objective Analysis, Predictive Analysis, and Key Performance Indicators (KPI).

Synchronist Suite Modules

- CRM
- PRIME BR|E
- Main Street BR|E
- Prospect Tracking
- Talent Development



Synchronist tools allow progressive economic development professionals to maximize their ROI: Influence, Visibility, and Impact.

Be wary of those suggesting questions or data are not important. They have never run an economic development organization, reported to a Board of Directors, or competed for funding. Successful BR|E has far more potential than confirming problems and starting relationships.