BUSINESS RETENTION & EXPANSION INTERNATIONAL

Business Retention and Expansion

Action Team Planning

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Purpose of the Exercise

- The Operation Team reviews research, identifies needs of and develops implementation plans for short-term issues, and sets priorities on longer-term projects
- Action Team agencies and members are identified
- Operations Team and Action Team members initiate planning efforts on specific initiatives
- Recommendations are provided to the Management Team and Stakeholders for approval and resource allocation

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Action Planning Initiation

- What are the key issue(s) that should be addressed?
  - Key issues can be gleaned from the survey 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
- How might these issues be addressed through the Action Team?

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Action Planning Initiation

- How might these issues be addressed through the Action Team?
  - A key component is the knowledge of potential Action Team members and the scope of their missions
  - Similar to the Red Flag Review session, developing an ***asset map*** of local and non-local technical assistance, education and service providers can 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 potential Action Team members
  - Designate specific Action Team sub-groups to address specific issues

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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

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Typical Planning Meeting Agenda

1. Reports on visited firm characteristics
2. Team examines research/survey results to identify issues
3. Issue components are identified and potential Action Team members are associated
4. Issue and component prioritization
5. Operations Team members take ownership for one or more issues
6. Recruitment/involve-ment of Action Team members
7. Planning of future activities

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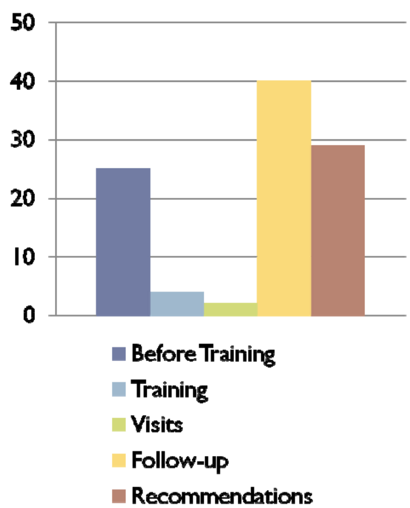
Action Planning Worksheet

1. What tasks will be carried out? Who on the Action Team is responsible for each task? When will the tasks be completed?
2. Are there others outside the Action Team that need to be involved?
3. Detailed suggestions on how to proceed.
4. What members of the group will be active?

Time in Most Successful BR&E Visitation Programs



- Most successful programs spend 40% (57 hours) on immediate follow-up
- The least successful programs spend 22% (11 hours) on follow-up

Questions?

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