

APPENDIX B: GUIDELINES FOR FIRM VISITORS

Purpose of Guidelines: To ensure that the visitors and firms enjoy doing the program and that good quality data are collected, leading to the retention and expansion of local firms and jobs.

Tips on Scheduling the Firm Visits

Who schedules the visits? You or your partner

Suggested conversations when you telephone the firms assigned to you:

“Good morning, my name is _____.

Recently you received a letter about a Business Retention and Expansion program from _____. This is an effort to see what can be done to improve the business climate for our local businesses and to help them improve their profitability.

Part of the program involves visitors like myself visiting with business owners or managers to get their opinions on these questions and to review the survey in that letter.

My partner, _____, and I would like to schedule a visit with you next week. What would be a convenient time for you?”

When? Telephone within one week
Visit within two weeks

Who should be visited? Owner or operator of the business

Where? At the firm’s office or home of the person you are interviewing

How long does it take? 45 to 60 minutes

Tips on Introducing Yourself during the Firm Visit

Break the ice and express thanks for the firm’s economic contribution to the community

Give firm owner an extra copy of the survey if the person doesn’t have one

Cover the two important survey ground rules (confidentiality of results and the skip-it rule – if they don’t want to answer a particular question, they can just say “I’d like to skip that one.”)

APPENDIX B: GUIDELINES FOR VISITORS (continued)

Tips for Person Asking Questions

Ask every question

Ask the question exactly as worded

No matter how bad the question seems, don't change it. However, if you may additional questions to the ones on the survey—just write down both the new question and the answer.

Listen carefully

As a visitor, your job is to listen to the opinions of the firms—they really like that (if necessary count silently to ten).

Repeat the question if necessary

Never suggest answers

Even if you are positive you know the correct one.

You may probe for answers

This is okay (e.g., "Could you tell us a little more about that?")

Do not take offense to opinions

If you start debating their points, some owners will stop sharing them.

Do not promise any solutions

The BR&E Task Force has no formal authority and budget with which to solve problems. They often can help firms look into these problems.

Tips for Person Taking the Notes

Always circle (never check) responses

Notes must tell full story

The local Task Force and coordinators can't read your minds. If the notes are incomplete, the firms might not be helped.

List visitors' names on the cover

If there are questions about your visit, you can be contacted.

Write clearly

Tips for After the Visit

With your partner, discuss whether there are urgent "red flag" issues

(e.g. firms considering moving, closing, or expanding)

Note urgent concerns or "red flags" on back cover

Return the surveys as soon as possible

Contact Information

Name of Person to Call if you Have Problems (typically the Visitation Director)

Phone number
