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1. Preface

Welcome to the Business Retention & Expansion Program Manual. The document is designed to assist in the creation of a program by providing a functional framework and explaining the concepts necessary to understand how communities undertake BRE. This section explains how the Program Manual was constructed, those who contributed to its creation, and briefly explains the elements contained herein.

Executive Summary

Business Retention & Expansion (BRE) is one of the cornerstones of economic development. By meeting face-to-face with local businesses and helping remove their barriers to growth, an Economic Development Organization can directly influence the success of their regional economy. It is a recognition that the most impactful way to assist businesses is one at a time. This document acts as a comprehensive resource manual for creating a BRE Program and getting it to work effectively.

This manual will provide the essential lessons needed to build a program, from establishing teams with their roles and responsibilities, to carrying out business visitations, to handling the referral process, all the way through follow-up. It was designed with Regional Enterprise Networks in mind and has been tailored to suit the needs of Nova Scotia’s emerging Regional Enterprise Networks.

In order to build a BRE program, an organization needs to assemble three main teams, a Management Team, an Operations Team, and an Action Team. The Management Team ensures that each part of the organization can easily collaborate. The Operations Team navigates business clients through the BRE process; they diagnose the client’s barriers to growth and refer them to specialists. The Action Team services those referrals and provides specialized resources to the business clients. These individual tasks create a simple client service experience.

While the basic BRE process is straightforward, a successful program can also be leveraged to better serve the community. The manual covers topics such as communicating the value of your program, using the data you have gathered to identify systemic issues, and organizing around a crisis scenario. The manual pays special attention to how a program can use its information to have a wider impact on the local economy.

The document should provide everything you need to establish and design a program which works for your organization. Hopefully it will answer any questions you have about Business Retention & Expansion. As always, the Halifax Partnership is available to provide assistance and help build a better BRE community in Nova Scotia. If you have any questions, don’t hesitate to contact us for advice or explanation.

Best regards,

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Contributors

This Program Manual was created in 2014 through the consultation and input from a number of different experts, individuals, specialists, and BRE practitioners. Their experiences and perspectives were invaluable in creating a robust model and providing careful scrutiny. It seems appropriate to acknowledge their work and contributions to the final product:

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Finally, there are a number of organizations and BRE programs which were examined to compare and contrast with the Program Manual. The collateral and documentation from these organizations were examined to inform the underlying research for this project. The context and challenges they face help to build a better BRE community and have certainly helped make this a more robust undertaking:

- Columbia Basin – Rural Development Institute
- North Dakota State University Extension Service – Centre for Community Vitality
- Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA)
- Swift Current Saskatchewan
- University of Minnesota Extension Service
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3. Introduction to Business Retention & Expansion (BRE)

This section serves as an introduction to the concept of BRE. It explains why the Program Manual was created, what the institution of BRE is, and why communities undertake BRE to impact their business community. Focus on this section if you are new to the concept of BRE and unfamiliar with other BRE programs and initiatives.

a. Background

The Nova Scotia Department of Economic and Rural Development and Tourism (ERDT) in 2014 facilitated the creation of several Regional Enterprise Networks (RENs) in its process of spurring economic growth across Nova Scotia. Early on in the rollout process, it was identified that RENs would be ideal vehicles for engaging with the business community. They are arms-length agencies that have a stake in the economic future of their own regions. However, to leverage this position fully, programming was needed to effectively and efficiently engage the private sector in the community’s economic success.

In 2015 the Department of Municipal Affairs (DMA) took on the responsibility for the Regional Enterprise Networks (REN) initiative and the continued support of a BRE program which is one of three core activities the RENs will be undertaking. Further, the Halifax Partnership has a tested, working BRE model for which to share with the RENs SmartBusiness, the organization’s BRE program, is an award winning initiative that has served as a model for organizations and programs across Canada and internationally.

DMA and the Halifax Partnership share a strong working relationship and already coordinate BRE efforts. Using DMA’s existing administrative framework and the Partnership’s model for a BRE program, the model was adapted for the RENs. This facilitated the creation of a program that would be applicable within the REN context and valuable for business outreach. This Program Manual reflects the concerted effort and expertise of these two organizations.

b. Defining BRE and its Purpose

Business Retention & Expansion is the activity of engaging with local businesses to help them improve, expand, or manage the decline of their operations. BRE is about removing the barriers to growth; it aims to strengthen a community’s ability to attract, grow, and keep businesses. But it is not simply a program; BRE is an institution that has become integral to the modern, developed economy. Many activities currently undertaken by public and private organizations resemble BRE and have evolved into hundreds of methods and practices; they all share the same overriding goals. Further, international efforts and partnerships through organizations such as Business Retention & Expansion International (BREI) and the International Economic Development Council (IEDC) have forged a community of BRE practitioners and helped spur innovation and research in its practice. The institution of BRE is complex, but it is an essential pillar of economic development.

Business Retention & Expansion is the effort of communities to actively engage with local businesses and it encompasses a variety of different programs and activities. The BRE holds that communities and businesses can work individually and directly with one another to improve economic and social outcomes. In the last 50 years it has become clear that broad-based support alone is insufficient to address the needs of business. Smaller communities, such as cities or rural townships, have become increasingly involved in managing their own
prosperity and have begun engaging unilaterally with firms. Unwilling to leave economic success up to chance, communities across the developed world have been organizing programs to participate in BRE.

Now almost every jurisdiction in North America has an economic development organization (EDO), whether at the municipal, provincial, state, or regional level; and most of these organizations have a BRE program. Communities often organize their resources to actively address the concerns and needs of businesses; BRE programs are the natural result of these efforts. Many of these organizations come from the public sector; it is natural for a government to take an interest in business performance, and it has the tools and resources to help private firms thrive. However, there are also non-government groups, such as Chambers of Commerce or semi-private Economic Developers that choose to engage in BRE. Regardless of what form they take, these groups create programs for addressing business needs and reaching out to companies in their area.

BRE has led to a renaissance in how the community interacts with business. Programs evolved simultaneously throughout many cities in North America, leading to an incredible diversity in program design, methodology, and organizational structures. Communities faced unique challenges, leading to divergent solutions in reaching out to the business sector. International organizations such as the IEDC and BREI saw this as an opportunity and their efforts to build a community of economic developers has leveraged the diversity of programs. By building on one another’s successes, and learning from the challenges and opportunities of each community, these associations have created an immense body of knowledge on economic development and BRE.

c. The Reason for BRE

Many communities participate in Business Retention & Expansion, which begs the question: “Why is it important?” It gives economic developers a tool to improve the business climate, it can help revitalize a community, and it helps connect EDOs to business. For all communities it helps build a more vibrant, bustling economy and bridges connections with the private sector. Whether an organization sets out to help build its economic foundations, or just fine tune business performance, BRE offers a way to help the community thrive.

Perhaps the most important reason for a BRE program is the empowerment it offers. It allows individual communities to take control of their own fortunes and directly influence their economic future. BRE is an accessible business support program; an organization of any size can make a difference, simply by being connected. Unlike other programs which require significant financial resources and overhead costs, a BRE program can be effective even if it is small scale. Smaller cities with less of an international presence are capable of undertaking a BRE program, where they might not have the reputation to attract foreign capital. Even very small communities have BRE programs because it allows them to make a difference in their local economies.

BRE is also a very useful program because it focuses on existing companies. Expansions of companies already in the community account for the vast majority of job growth. Investment attraction, while very useful for a community, is an expensive undertaking and comes with high initial costs. BRE is a much more rewarding and lower cost alternative for generating job growth and economic outcomes. Its cost efficiency and high impact make BRE a valuable tool for economic developers. Even large communities have BRE programs because it allows them to have very direct and efficient impacts on their business community.
BRE offers a direct way to engage the private sector and the community. The unilateral nature of these interactions makes them personal, and the tools of a typical BRE program help the business connect to local resources. This helps the business become more invested and attached to the community; it helps the community recognize and appreciate the importance of the business. Building connections between firms in the private sector and community infrastructure helps build a lasting relationship and keep the business linked to the community.

BRE programs offer an efficient, scalable, high impact alternative to traditional broad-based economic development techniques. Whether the community is large or small, there are benefits to engaging in BRE. Connecting the community to the private sector helps to build a sense of mutual understanding and encourages businesses to invest locally. This explains why it has been adopted and utilized so widely and is implemented by so many communities of such different sizes.

d. Alternative Approaches to BRE

The BRE model presented in this document is designed to fit the context of the new RENs. However, as mentioned earlier, there are a wide variety of different BRE program models. It is important to peripherally understand how BRE is undertaken in different jurisdictions and appreciate why the model has its current form.

In Economic Development literature, the program explained in this manual would be referred to as a “continuous model” of Business Retention & Expansion. However, there are other approaches to BRE, each with their own advantages and disadvantages. The contrast to the continuous model is known as the “traditional model” and is typically used where paid personnel are unavailable or too expensive for the program. The traditional model revolves around the heavy use of volunteers, and sudden, high volume outreach programs.

A traditional model aims to reach as many businesses as possible in order to gain a better understanding of the community as a whole. It has short term benefits and is generally replicated every few years. It is commonly used in rural communities with a small number of businesses. The traditional model is less about relationship building as it is about information gathering. Instead of putting an emphasis on interactions, it is about meeting and reaching as many firms as possible. For a Canadian example of a traditional model, the Ontario Ministry of Agriculture and Food has a very extensive and well-defined program for volunteer based BRE outreach.

The advantages of the traditional model are clear: In a situation where one can interact with every business in a jurisdiction, it sends a message that the community is ready to support its industries. However, due to the temporary, periodic nature of the outreach there is also the risk of not changing expectations. A continuous model has many advantages in the long run, and focuses on connecting businesses to the community and building relationships. Over time, experienced Account Executives can facilitate more productive engagement.

While it is not necessary to comprehend the intricacies of other BRE models, it is useful to appreciate the differences of other programs. Learning from other BRE practitioners is a valuable experience and understanding their models helps contextualize the challenges they face. As with any new program, learning and evolving how the program works will be part of the process; and there is a lot of content to understand for a BRE program. If you are ever curious about how to improve a BRE program, other communities are a great source of information to learn from.
4. Program Design & Framework

This section outlines how a BRE program should be organized. It explains how various teams and components interact with one another, why BRE targets individual companies, and the mandatory elements of a functional program. Anyone who is unfamiliar with a continuous model of BRE should focus on this section; it is essential to understand how the program is designed to operate.

a. Core Process Overview

The core activity in a BRE program is quite simple: visit businesses and connect those experiencing barriers to growth with the resources needed to overcome their barriers. How this task works in practice is actually quite intricate and there are many different approaches. This framework encompasses the general, overarching concepts that define how BRE operates. Consider it a set of high level guidelines for BRE operations.

Before getting into details, there are several core teams within a BRE organization, the Management Team, Operations Team, Action Team, and (in some cases) Response Teams. Each of these Teams has a part to play in the day-to-day activities, and each must rely on others in order to succeed. Detailed analysis of their roles and responsibilities can be found in sections 6 through 9; briefly described:

- The Management Team ensures that each part of the organization can easily collaborate. This team is made up of a Program Manager, or the EDO’s existing management staff.
- The Operations Team navigates business clients through the BRE process; they diagnose the client’s barriers to growth and refer them to specialists. The Operations Team is the workhorse of a BRE Program and it is composed of Account Executives.
- The Action Team services the referrals and provides specialized resources to the business clients. This team is made up of decision-capable contributors from a broad array of external organizations.
- A Response Team is an ad-hoc group that provides high-level intervention in a crisis scenario. Each Response Team is organized when a crisis occurs and is made up of Action Team members and influential decision makers within the community.

This BRE model focuses mainly on the visitation and referral process; the core activity of BRE. It runs on the principle that this process should be as simple as possible for the client. The Operations Team connects the client through every step of the process, ensuring that they are introduced to the program, connected to specialists in the Action Team, and followed-up with after their issues are addressed. The Operations Team ensures that the business client knows exactly who they should be speaking to throughout the process. The typical trajectory for a business looks like this:

**Outreach** begins with an Account Executive, a member of the Operations Team. They are in charge of reaching out to potential business clients, or communicating with clients who have sought out the BRE Program. They will work with the client to schedule a 1-2 hour meeting with the business’s owner or a local, senior executive within the company. In preparation for this meeting, the Account Executive will also perform some cursory research on the client and get a basic understanding of who they are dealing with.
Next is **Visitation**. This is where the Account Executive meets with the client and performs what is known as a ‘diagnostic visit’. The Account Executive listens to the client and probes for information in order to help both parties diagnose the company’s barriers to growth. During this meeting, detailed data on the client is recorded using the Diagnostic Tool (sometimes called a BRE Survey) to better understand what is going on with the business and help make referrals. By the end of the meeting, the Account Executive should understand the business’s issues/concerns and discuss what resources are available to assist them.

After the meeting, Account Executives can begin **inputting** the data. The Account Executive enters the information they gathered with the Diagnostic Tool into a database or content management system. This allows the program to monitor trends and results, report on its efficacy, and leverage the body of information to inform future programming. It also allows the Account Executive to make referrals to the Action Team.

**Referrals** occur within a short timeframe after the meeting completes. The Account Executive reaches out on behalf of the client to specific member(s) of the Action Team. These members are chosen based on the resources or programs they provide and the barriers identified during the diagnostic visit. The Account Executive ensures that these Action Team members quickly make contact with the client and that Services are offered.

In some rare cases, a **Red-Flag** will occur. This means that during the diagnostic visit, an issue was raised that represents either a high-value opportunity, or a potential crisis. In this case the Action Team may be unsuitable to handle the issue, or some high-level intervention may be needed. Instead of making referrals, a Response Team is formed to tackle the issue. This is a very rare situation and is addressed in detail in the General Operations section ([see Red Flag Mobilization 5e](#)).

After referrals are made, **Services** are offered by the members of the Action Team to the business clients. These are programs or resources within the community that the Action Team has pre-arranged to provide in case of a referral. The Operations Team largely avoids getting involved with this part of the process and allows the client and Action Team members to work directly with one another. Once services have been provided, or it’s determined that their services cannot be provided, the Action Team member informs the Account Executive. This signals to the Account Executive that they can reengage with the client.

**Follow-Up** occurs after the client has dealt with the Action Team; it is essential to BRE. The Account Executive reinitiates contact with the business client and ensures that the process has occurred smoothly. This involves discussing the experience with the business and probing into progress on their barriers to growth. This is similar to a diagnostic visit, but is less formal and smaller scale; it typically does not involve the use of a diagnostic tool or formal data gathering. The Account Executive discusses with the client and determines whether more referrals are valuable, whether the initial issues have been resolved, or if they should check in with the client at a later date.

These steps form the core activity for a Business Retention & Expansion Program. It is critical to note that while each business client follows these steps in order, an Account Executive will be dealing with multiple companies concurrently. Different companies will be at different stages of the process and will be progressing at different speeds; an Account Executive should be careful to only manage as many clients as they can handle. From initial outreach to eventual follow-up, the Operations Team keeps up with the business client and ensures progress is being made. This main process is repeated continuously and concurrently, company by company.
b. Overall Framework

There is more to a BRE Program than just its core activity. Running a successful program involves many activities outside the scope of Visitation and Referral. As mentioned earlier, there are four main groups that make up a BRE Program, Management, Operations, the Action Team, and Response Teams. Each has a role to play to make the process go smoothly. Below is a diagram that displays which teams are connected to one another:

Blue regions represent internal teams or processes (e.g. Operations Team, Management Team, Media Support). Green regions represent partners or cooperating agencies (e.g. Action Team, Response Team). Red regions represent external organizations (e.g. The Business, Stakeholders).

The top half of the diagram shows the connections necessary for BRE’s core activities. External business clients engage with the program through the Operations Team. As described in the previous section, these clients are directed to either the Action Team (through a referral), or a Response Team (through a Red-Flag).

The bottom half of the diagram shows the role of the Management Team. They communicate the BRE Program to external stakeholders and ensure that the different teams can collaborate easily with one another. This means inducting organizations into the Action Team and working out service level agreements, ensuring the Operations Team is up to date on programs from the Action Team, deciding how data should be used, communicating program’s results to community stakeholders, and organizing the community around issues which arise from the program’s findings. In rare cases they also assemble a Response Team around a crisis scenario.
Throughout the visitations, the Operations Team will be using its Diagnostic Tool to record and input information on local companies. Once a sufficient number of companies have been visited there will be opportunities to leverage the gathered data. While information on individual companies is protected by strict confidentiality, aggregated data can be used to show trends in the business climate, opinions of municipal services, and a number of additional topics. It will be invaluable to the Management Team as it reaches out to community stakeholders or external funders and can help identify larger, systemic targets for the community. Reporting out on the activities, success metrics, and competitive intelligence will provide value to partner organizations and create movement around larger issues.

Overall, the BRE program is designed to serve two functions: addressing the needs of individual visited companies (called Company Specific issues) and creating action on more systemic issues facing businesses throughout the economy (called Company Common issues). The framework of the BRE program provides a useful context to resolve individual problems. Core BRE activity allows the Operations Team to diagnose a business client’s barriers to growth and the Action Team has the resources and programming to remove them. The Management Team assists by engaging organizations throughout the community, ensuring the Action Team continues to contribute to the process, and external stakeholders are informed and supportive of local economic development. But it is also important to tackle more systemic issues. Reporting out to external organizations allows the Management Team to rally support and work on resolving widespread issues. Together these two functions form the basis of a Business Retention & Expansion initiative.

All these activities form the framework of a continuous BRE program. It is based on the core concept of keeping interactions on the client side very straightforward and directed. This layout has been kept broad enough to provide room to innovate and improve upon while still providing a clear picture of expectations, operations, and organizational responsibilities. It should provide the context necessary to establish a BRE program. Further sections will explain each of the processes and considerations in greater detail.

c. The Action Team

The Action Team, more broadly referred to as a ‘client services network’, is a set of organizations and individuals that provide programs and tools to BRE clients. A BRE program is designed to match clients to the organizations that can best assist them and leverage the resources in the community to remove that client’s barriers to growth. This means that the Action Team’s capabilities define the range of benefits a BRE program can provide to its clients. This makes it imperative that a BRE program includes a robust set of partner organizations.

One of the main preoccupations with the Management Team is inducting new individuals and organizations into the Action Team. This involves reaching out to program/service providers in the area, whether government, private sector, or non-profit. The Management Team needs to communicate the value of the BRE Program to this service provider in order to reach a shared services agreement. The pitch is an easy one.

The BRE Program can offer a program/service provider with clients, and due to its diagnostic capabilities, it provides clients which are specifically suited or interested in the partner’s offering. In exchange, the service provider offers a straight-forward approach to accessing their program; i.e. direct access to a decision capable individual who can help businesses through their issues. If the BRE Program has business clients, it needs to know which ones it should direct to that partner. If the partner has clients that they cannot assist, the BRE
Program makes an ideal place to direct them. Both organizations should reach an understanding as to what their optimal referral looks like, establishing what sort of client the service providers and the BRE Programs are looking for. For more details on this process, check out the Management Team section (see Action Team Induction and Engagement 6c).

The more partners the Operations Team can make referrals to, the more clients the BRE Program can assist. Building a robust Action Team is about identifying the typical barriers faced by businesses and the tools available to combat these issues. Large organizations such as Provincial and Federal departments will be valuable, as they are regularly innovating within their policy space; creating new programs and initiatives to combat notable problems. These organizations also have senior officials who will be useful to the Response Team, so making early inroads will be a useful exercise. Building a wide-reaching Action Team is about cooperation with organizations within the community and building stronger relationships.

As described in the framework above, the Operations Team makes specific referrals to Action Team members. Account Executives must be able to identify issues and navigate this network in order to provide solutions to clients. Having only one or two go-to contacts in each Action Team organization makes it much easier to quickly make a referral. Despite the need for a large selection of tools and programs to be available through the Action Team, simplicity is desirable for smoother operations. When selecting who to induct into the Action Team, there are two broad goals: Firstly, avoid duplication. Secondly, focus on reliability. You can dramatically increase reliability by ensuring a high level of awareness between organizations. Periodic meetings between the Operations Team and members of the Action Team can help to build a sense of familiarity and camaraderie while renewing shared services commitments. If any of the Action Team’s offerings change, it will be useful to keep the Operations Team informed and up to date. Building a better Action Team will increase the capacity of the BRE Program to help business clients. A BRE program can only be a useful as its Action Team allows.

d. The BRE Diagnostic Tool

As part of the visitation process, the Account Executive is expected to use the Diagnostic Tool to gather information about their client. This information is taken under strict confidentiality and recorded within a database for aggregation and internal use. This tool is a series of questions designed to guide discussion and let the Account Executive interact with a CRM system. It sets the context for conversation and creates a consistent way for the Operations Team to record the information they discover throughout the visitation process. These tools are used in almost every jurisdiction that undertakes Business Retention & Expansion, perhaps every one.

Traditional models of BRE refer to the Diagnostic Tool as a Survey; in the larger BRE community this is by far the more common terminology. The word ‘Survey’ is used because in that model, where information is gathered by volunteers, questions are asked like a public poll. In that model answers can be evaluated because the questions are asked verbatim and this achieves consistency across all of the volunteers.

In our continuous model, where trained professional are used, verbatim questions are unnecessary and there are opportunities to create a better atmosphere through conversation. Account Executives will be very familiar with their Diagnostic Tool and what the questions are designed to identify. They have the business acumen to understand and contextualize what a business is telling them and will achieve consistency by interpreting answers in the same way as their peers.
For a successful program, the less rigid methodology is useful. It allows the Account Executive to adapt to the business client’s responses, focus on specific topics, and purposefully search for their barriers to growth. Information gathering is crucial, but most importantly the Account Executive is there to diagnose issues. If a client wishes to talk about a specific subject, don’t be burdened by the format or order of the Diagnostic Tool. Feel free to let the flow of conversation guide the discussion; don’t feel the need to lead discussion down a particular path. This lets the Account Executive engage with a client, which is much more conducive to sharing information and long-term relationship building. Critically, they should focus on being an active listener, rather than trying to survey the client. The Diagnostic Tool serves as a guide to conversation, providing questions and topics that an Account Executive can return to. The questions can be used to spur an otherwise stale conversation forward or to frame a discussion, but the Account Executive should let the client do most of the talking and only interject when necessary.

There are biases in BRE data that will prevent the information from being strictly comparable to a public poll. Most notably, the selection of business clients is not random, and sampling biases will occur. However, this data is still enormously useful, and the data biases can be normalized through proper training of the Account Executives. Insure a consistent interpretation of the questions and responses across your Operations Team. Communication within the team will lead to an understanding of why specific questions are asked and when they should be asked. This allows for much clearer analysis and consistency of the resulting data. The data will highlight the trends and qualities of the businesses that you interview. When a sufficient number of businesses have been visited, it will provide useful analytical data, but it must be interpreted carefully.

Over the past 10 years, the Halifax Partnership and ERDT had been honing and fine-tuning the Diagnostic Tool with help from provincial and federal partners. Specific effort was made to tailor the tool so it would work for the emerging RENs. The shape of the tool will change over time and new questions and changes to existing questions are expected in early 2016. Going forward, it will be necessary to coordinate and centralize revisions. This will ensure that the data remains comparable and analytically consistent between regions and across time. Survey changes will be centralized to ensure that all RENs are gathering comparable information.

To summarize, it is important to consider how the BRE Diagnostic Tool is implemented. It is necessary for the Account Executives to engage with the client, build relationships, and to have a fruitful and interactive conversation. Treating the tool like a verbatim survey may cause more harm than good. Consistent interpretation of the conversations, rather than strict interviewing practices can be used to achieve high quality conversation and a high quality of data.

e. Confidentiality & Data Control

In order to properly diagnose business issues with their clients, Account Executives need to understand a business. This means that a lot of the information that is gathered through conversation will deal with private and confidential subjects. It significantly improves both the quality of the responses and the accuracy of the information if the company can speak in a forthright manner and not be hampered by concerns about their level of privacy. The BRE program must enshrine the rights of the companies it interviews and hold the confidentiality of their information to be sacrosanct. Careful consideration should be taken to gather and protect this data in an ethical and above-board manner.
A system has been established provincially in order to keep this information safe and guidelines have been put in place about how the data can and should be used. First and foremost, the company’s rights to privacy must be protected; specific information shared with BRE staff *cannot* be provided to third parties. All parties who deal with this information must be aware of their roles and responsibilities as they pertain to confidentiality. This occurs through three processes:

Firstly, the company must be aware of the protections afforded to it and a get a rough idea of how the data is intended to be used. To this end, each BRE Survey includes a legal disclaimer, allowing the company to express its understanding of this process. They must be aware that their information is protected by the BRE staff and that their company’s specific information will not be used directly.

Secondly, all BRE personnel, managers, and even Action Team members must be aware of their responsibilities with this data. Anyone who views, accesses, uses, or records the data should sign a disclaimer to ensure that they intend to keep and protect confidential information. This is generally referred to as a legal umbrella; where staff who have signed this document are ‘within the umbrella’ and capable of accessing the information for internal purposes. Generally, access to the information is limited purely based on need. An individual is only given as much access to the information as they need to perform their duties. This will be explained in greater detail below.

Thirdly, any public or exterior use of the data (those ‘outside the umbrella’) should be limited to uses which protect the privacy of the business clients. Any reports or public facing documents should only use aggregated information. It should be impossible for even a determined scrutiniser to identify or infer information about a business client by viewing the presented data. For example, while a cross-section of all businesses responses to specific questions may be shareable, individual responses to those questions would be inappropriate.

As was mentioned previously, in order to limit the flow of information, each data user is afforded a level of access depending on their operational needs. The existing CRM system, Executive Pulse, is already designed to provide these levels of access on an as-needed basis. The levels can be loosely organized into three categories: Provincial, Regional, and Company.

An Action Team member only needs to know about the individual company they are providing services for and they will only need a select bit of information; this is the Company level. An individual REN only needs to know about the companies in its own community, but it needs all of the information gathered on those companies; this is the Regional level. To facilitate the operational integrity of the program, or to provide services to multiple RENs, the DMA Coordinator will need access to information from each of the RENs; this is the Provincial level. However, it is important to note that the DMA Coordinator, in this case, is separate from ERDT as an entity. Company, contact, and confidential information cannot be provided to other members of DMA without the expressed consent of the REN. The following diagram should roughly summarize these levels:
Information gathered through BRE visits cannot be shared or disseminated outside this context without the expressed consent of the REN through a data sharing agreement. Further, parties outside of the ‘legal umbrella’ cannot be given information about individual companies, and this data must be packaged, aggregated, and removed of identifying markers before it is made available more widely. Within the umbrella, BRE staff will regularly provide a limited selection of their information to Action Team members in order to complete referrals. Importantly, data is separated between the RENs. Each REN cannot look at data on companies visited by other jurisdictions unless this information is shared willingly. This forms the structure with which data is accessible and confidentiality is protected.

f. Company Specific & Company Common Issues

Gathering information from business clients will reveal a lot of information about their operations, their structures, and what barriers these clients are facing. However, a BRE program is not solely diagnostic; it is important to realize what can be done with this information. To this end, the barriers that businesses face are usually classified into two categories: Company Specific and Company Common issues.

Company Specific issues are those which are endemic to the business client being interviewed. These can include issues with signage bylaws, the export process, or conceivably any number of individual barriers to growth. The continuous BRE model is designed to tackle Company Specific issues. The individualized scope of a BRE interview is perfect for diagnosing the problem and identifying the proper tools to resolve the barrier. Further, the BRE program has resources available through the Action Team that can handle these problems. A business may be experiencing several of these small issues, and they can be dealt with within the context of day-to-day BRE operations. Suffice it to say, Company Specific issues should not be a large hurdle for a BRE program with a good Action Team.

Some issues are much larger scale and will affect companies throughout the community; these are referred to as Company Common issues. They are much more difficult to identify and the referral system may not be sufficient to tackle them. Diagnosing these issues occurs through communication between teams, when multiple Account Executives converse, or data trends emerge, and common trends begin to appear. To resolve these issues the
BRE staff must look to alternative solutions within the community. They may require new programming, organization of community resources, or even modifications to programming already in the region.

Many BRE programs across North America have deftly and adeptly handled Company Specific issues. There is no shortage of examples of BRE outreach making a difference to a specific company and helping them grow their business. However, many programs have difficulties addressing the larger scale Company Common issues. It is essential that a BRE program be constantly aware of its operations, looking for trends within the business sector, and engaging its community stakeholders to address these issues. With help from data support and the Operations Team, the Management Team is able to look at the larger picture and trends within the data. It is important to regularly take the time and step back from day to day operations in order to examine the big picture. This means looking systemically at the BRE data in order to illuminate Company Common issues. Taking the time to properly diagnose and combat Company Common issues is how a good BRE program becomes a great BRE program.

g. Scope of Engagement

A program’s scope of engagement is a set of decisions on how it interacts with clients. It is the number and format of client meetings. The majority of BRE Programs use bilateral engagement; i.e. meeting businesses one on one. However, there are some opportunities for innovation and opportunities to use different scopes.

BRE, especially in the continuous model, uses very small scale interactions. The visitation process is bilateral and typically involves only the Account Executive and the business owner/manager. Except when training new personnel (and expressly agreed by the client), there are only ever two people in the room. This scope is chosen because it makes it easier to get confidential or sensitive data and lets the Account Executive focus on issues endemic to that company. It makes conversation easier for the client and assures them of a level of privacy and discretion. Introducing observers or additional participants, especially other businesses, makes the client less likely to share information candidly.

An individual scope is also used because BRE requires a high level of participation from the business. It makes sure the Account Executive can keep the client engaged and talking, to focus their attention on very detailed information. It lets them work with the client to delve deeper on specific issues and affords them the opportunity to look in-depth when they notice barriers to growth. The BRE staff can address the high priority issues, even if they are only endemic to that firm. A format with more than one client could only keep the clients engaged if they could find issues common to both companies.

However, there are opportunities for meeting with medium, or even large sized groups. Spin-off programs, such as focus groups and business walks, have met with success in a number of jurisdictions and can complement core BRE activities. These larger scopes offer a wider impact; they reach many businesses in a short period of time and can be great for increasing awareness. These sorts of initiatives serve complimentary roles, but they do not replace BRE activity. They are meant to enhance the reach and scope of the organization, rather than circumvent the need for the visitation process.

It is also important to note that while BRE is designed for existing, local companies, it can be undertaken in a number of different contexts. The connections, framework, and tools available can be leveraged for other
purposes, such as companies which have recently relocated, and companies which have recently closed. Providing BRE services to recent arrivals allows the community to welcome the business and help the business get a running start. This is typically referred to Aftercare and it can make a dramatic difference in a company’s engagement with the community. Closed companies and those which relocated away can offer valuable targets for information gathering, providing reasons why a company may be interested in leaving (or moving to) your jurisdiction. Consider reaching out to these groups and having a conversation with them; learn where and how you can improve.

While the core activity of BRE is designed for a small scope and existing companies, there are benefits to reaching out in other contexts. When conversations with one firm can spur additional input from another, there is the potential of a more open format for discussion. More public and open engagement, as well as the participation of public officials and other observers can be very useful for increasing awareness. That said, core BRE activity is a bilateral undertaking; it is improved by encouraging more active and in-depth engagement. Therefore, it requires a focused scope of engagement, one which the individual visitation process provides. First establish a functional BRE program, and then look to identifying other initiatives which can reach a wider scope.
5. General Operations

This section provides a more concrete example of what day-to-day activities look like. It walks through how interactions occur with business clients, how the Action Team gets involved, how the system gathers valuable information, and how this information is used. Anyone who is taking part in BRE activity, especially Account Executives, should focus on very thoroughly understanding this section.

a. Outreach & Visitation Process

Most day-to-day activities centre on the Operations Team. Specifically this team is made up of individual Account Executives who reach out to the business sector in order to initiate the BRE process. First, a potential client must be identified; this can be essentially any business which operates within the region. The Account Executive should make contact with them through whatever means are most appropriate and schedule a one-on-one meeting with the company leadership or establishment owner. They should include a brief explanation of BRE and the services they offer. Explain to the client why they were selected for visitation and what will happen with the data you want to collect. This initial meeting is referred to as a Diagnostic Visit, or sometimes a Retention Visit. Prior to the meeting it is expected that the Account Executive does some very preliminary research on the company, finding their basic information and gaining at least a vague understanding of what the business does or the industry in which it operates.

This meeting will typically last about an hour to an hour and a half and involve a conversation between the Account Executive and the business client. Over the timeframe a few processes will occur. Firstly, the client should be asked to sign a legal disclaimer, a one page document which demonstrates that your organization will protect their information and maintain confidentiality. Secondly, the client and the Account Executive should engage in a conversation about how the business operates and what troubles or barriers to growth they are experiencing. This is where the bulk of the diagnostic work occurs. It is the Account Executive’s role to help the client identify where he is experiencing issues and hone in on exactly what the underlying problem is. At all times personnel should behave as active listeners, meaning that information is gathered and that the conversation is interactive and engaging. While it is important to keep the conversation relevant to business, the Account Executive should avoid directing the conversation unless it is necessary for the diagnosis or to spur on otherwise stagnant dialogue. If a business owner wishes to focus on a particular part of their business, it is likely important to operations and they should be encouraged to focus on it.

While this conversation is occurring, the Account Executive should be keeping note of what is discussed and recording information that they can gather, using the Diagnostic Tool for context (see The BRE Diagnostic Tool, 4d). Either during, or at the conclusion of the interview, they should provide the client with a few referral options. These options should serve as suggestions to address or remove their barriers to growth and the programs in the community which can be used to assist them. It is important to get the client’s permission before any referrals are sent on their behalf.

Once the meeting has concluded, a kind and sincere gesture will make a significant difference; thank the business for operating in the community. This may be a novel concept for most businesses and they can respond in an odd or unfamiliar manner to being thanked for running a company, but they should respond positively.
This simple gesture can have an impact in how they think about the community. The reason for this gesture is twofold: Firstly, it is useful to have entrepreneurs or business owners operate in the community and they generally deserve the thanks. They provide a useful and productive service simply by choosing to operate. Secondly, existing companies are often left behind in many economic development spheres, with most attention being focused on bringing in new business through investment attraction or preventing troubled businesses from leaving. Many companies relocate to, or operate in a community for years without attention or even recognition of their contributions. You will find that thanking a business for their effort will go a long way in helping to build a relationship.

b. Referral Process

After the initial Diagnostic Visit is complete, the Account Executive should immediately input their information and make their referrals. Maintaining a very strict timeline for turnaround will convey to the business client that helping them is a priority and will make sure the client spends less time unengaged with the program. The aim is to keep all referrals under 48 hours, from the end of the Visitation until the Action Team member reaches out to the business client. Strictly enforcing this timeline will help maintain your program’s reputation as one that is focused on aiding business. These referrals, known in Executive Pulse as Action Items, are messages from Account Executives to Action Team members. They provide the Action Team member with summary information about the business and the services or programs the client is interested in. It is a request for the Action Team member to make contact and consider the business client for program offerings.

These referrals should be based on the Account Executive’s diagnoses and are aimed at removing the barriers faced by the business client. Sometimes they are requests for programs, but other times they are simply a request for expertise. Often the business is not in need of incentive or support, sometimes they simply need a process explained or clarified. Sometimes they just need to know they have the right contact. All of these issues can be resolved by leveraging the experiences, resources, and connections of the Action Team. Once the referral has been made and the Action Team member makes contact with the business client, the Account Executive can temporarily step back from the process. They won’t need to get involved again until the referrals are complete.

c. Follow Up

Once the referral is made, Executive Pulse tracks its progress using an Action Item. Both the Account Executive and the Action Team member can see and update the Action Item, which will report the progress of the referral. When the advice or services have been rendered by the Action Team, or they are unable to make contact/provide the services, the Action Item will allow the Account Executive to know if progress has been made. This serves as a signal for the Account Executive to re-establish contact with the business client and ensure that the business is functioning without issue.

The follow up period is essential to relationship building and as oversight for overall program success. It ensures that the clients are capable of expanding or maintaining their operations and that the BRE program has helped them along. At this point, it is prudent to quickly engage with the client again and check to see if any other referrals are needed or if there are other issues that need to be addressed. While this sort of contact may be smaller in scope than a Diagnostic Visit, it can be used to diagnose any remaining issues.
Cooperation with local officials can be useful for follow-up. Sending out thank you letters with a local mayor, to the businesses that met with your Operations Team, can send a strong message that the company is valued. This helps remind the business of the services and connections they received and can cement the relationship with your organization. If the client is satisfied with the service and may require help in the future, it provides an opportunity for the Account Executive to schedule another visit for a later date or the following year. This helps maintain a client base for the BRE program and helps keep businesses engaged with the community.

d. Data Management and Use

A large part of the Account Executive’s role is to gather information about the companies it visits. During the Diagnostic Visit, they are examining the client’s barriers and operations. This is a very powerful source of data collection and must be properly tracked and utilized. To this end, the Account Executive should use the Diagnostic Tool and record the company’s information within Executive Pulse.

Information is recorded about a company based on the type of activity that is involved; e.g. Retention Surveys track information from the initial Retention Visit, Action Items track referrals, Journal Entries track supplemental meetings with business clients. While it may sound complex, each of these items is created to provide an Account Executive with the proper forum to record relevant information. They were chosen to track and monitor specific kinds of contact and are fairly intuitive once the user has been introduced to the system. There is also support available through Executive Pulse (or peers) to teach users how to interact with the system.

Once this information is in the system, it can be accessed using the CRM’s search tools. Data Support Staff and the Management Team can create reports on all of the companies input into the system. Account Executives can also use the CRM system to review their companies and activities in order to manage accounts. This data can be used to generate reports and provide information to stakeholders, details are in the Marketing & Communications section (see Stakeholder Reporting 11b). There are numerous data points that can be used and the possibilities for useful collateral are expansive. For example, the Halifax Partnership periodically produces the SmartBusiness Report using this data; see below for a visual example of how this data can be leveraged. You have access to an incredible amount of information through a BRE Program; use it.
e. Red Flag Mobilization

Though certainly not a day-to-day activity, in some rare crisis scenarios you may need to mobilize a Response Team. Deploying this team is no easy task and generally requires connectivity and strong relationships. The Management Team needs to be able to reach out to high level figures within several different organizations and convince them that the business client is an immediate priority. Despite the difficulty in arranging this, the process for mobilizing a Response Team is actually quite straightforward. It can be divided into a few steps.

Firstly, the issue must be properly identified; this is handled internally by the Account Executive. If they intend to leverage a Response Team, they should take the time to clearly and definitively diagnose the issue. They should ensure there is a consensus with the client as to what their chief concerns are and what is causing their problems. Then they must make a judgment call as to whether this company’s needs can be handled through the Action Team or whether a Response Team is required.

Once the issue has been identified and the Account Executive wishes to proceed with a Red Flag, they need to consider how to formulate a Response Team. As with any referral or BRE process, the business should sign off on any activity involving third parties. This also provides an opportunity for the Account Executive to discuss with the client and determine which players they would like to be engaged with on a potential Response Team. In some cases the team will only be two or three individuals; in other cases a much larger team may be necessary. When considering which organizations to involve consider who has something useful they can bring to the table and the scope of engagement that the business client expects. If the client is intent on making a presentation or pitch to the community, a larger Response Team will increase the scope of this outreach. If the client is very partial to confidentiality, a smaller Response Team will allow for more engaged, productive interactions.

Once the Account Executive has a scope for a Response Team, these organizations and individuals need to be mobilized. Most of these groups will come from the Action Team, but including key decisions makers or influencers will help as well. The Management Team should be reaching out to these groups, organizing them around this issue, and very quickly engaging each of the prospective members. While it may be difficult to organize them in a short time frame, a Red Flag scenario is invariably a crisis, and instilling this importance on the Response Team can help them make it a priority. The goal at this point is to get the client and the key decision makers in the same room and to get everyone invested in finding a solution.

Finally, once the Response Team has met with the client, it is the Account Executive’s role to ensure that all sides live up to their ends of the agreement. Consistent follow up with the players is needed to guarantee the success of the operation. The Account Executive should be cognizant of what each organization needs to do to succeed and that each party is delivering on its promises. Further, the Account Executive should monitor the company in the longer term as well. As the project unfolds and the Response Team completes its tasks, the Account Executive should be ready to follow up and see to the needs of the company once the crisis has passed.

Each mobilization is essentially a project for the BRE staff. These are very important situations that occur under very rare circumstances. A lot of ad-hoc work will be required as each situation is unique, but a properly executed Red Flag response is a powerful show of force and can be a defining moment for the BRE program. The Response Team should be considered a tool of last resort, but also the most comprehensive solution the BRE program can offer.
f. Additional Programming

One of the common problems experienced in BRE programs across North America is the inability to enact large scale change and handle Company Common issues. But BRE is actually a very useful tool for identifying where these changes are needed. These systemic issues are identified from noticing the patterns in BRE visits, or from a structural look at the data; this is one area where a BRE program excels. The regular interactions with businesses and the constant influx of competitive intelligence provide a plethora of information for creating, evaluating, and informing new initiatives.

The challenge is in taking the time to step back and analyze the big picture. Account Executives will notice common themes from their visits, or should inquire if their peers are encountering the same barriers. Periodic communication between Account Executives can drastically help in illuminating where these commonalities exist. Especially in larger programs with many Account Executives, interactivity between staff can lead to important discoveries. The Management Team should regularly step back from the day-to-day operations and look at the larger scale. It is easy to get lost in the churn of the visitation process and abstracting from a straightforward operation is not always easy. Thoroughly identifying these issues makes them easier to understand and address properly.

Many Company Common issues cannot be resolved in the context of BRE operations. They either require a different approach or more community resources in order to address; it may even take specialized programs to combat these problems. Creating side programs and providing support to the business community is a direct way to help resolve these problems. Many, in fact most, of the Halifax Partnership’s programs have been created because an issue was recognized through BRE. BRE provides a host of qualitative and quantitative data that can be used to evaluate, inform, and even secure funding for a solution.

Members of the Action Team may also provide valuable program partners. The key is to use the incoming information to create the greatest impact. Identify and isolate exactly what the underlying issue is, what sort of companies it is affecting, and how damaging or impactful the problem is. BRE is a resource, use it effectively.

A BRE program is designed to interactively assist business clients, but as a by-product it also produces a lot of valuable information. Getting tangible, economy-wide value out of a BRE program is about finding a productive way to use this stream of data. From the visitation process where issues are identified, to interactions and cooperation with external Action Team organizations, to relationship building with business clients, information is attained and networks are established. The BRE program lays the foundation for an organization to directly and substantially impact their community. Leverage that opportunity however possible.
6. The Management Team

This section explains the purpose of the Management Team. It outlines their roles and responsibilities, and how they are meant to interact with other teams within the program. Management and administrative staff, as well as those with oversight into the project should focus on this section.

a. Roles and Responsibilities

The Management Team serves as the executive for BRE. They ensure that the program is funded, staffed, managed, and that its large-scale strategic goals are set. They tend to the program’s needs and ensure exterior organizations are supportive and aligned with its objectives. The Management Team’s chief concern is making sure that the community is supportive and ‘on-side.’ The team can be organized in a number of ways, though its roles are often fulfilled by the organization’s existing executive. Given the similarities between the management of an EDO and a BRE program, these functions can be fulfilled by the same position(s). Their roles include:

- Overseeing the funding, staffing, and administrative functions of the BRE program;
- Selecting and inducting organizations into in the Action Team;
- Keeping BRE staff aware of programming and tools available through the Action Team;
- Determining the large-scale strategic goals of the program;
- Coordinating the Response Team to handle red flag issues; and,
- Utilizing support personnel for marketing and reporting purposes.

The Management Team serves the role of communicator and negotiator. They must maintain and focus the support of various external agencies to ensure funding, support, and direction for the program as a whole. When external support is needed, either from government or individuals, they coordinate key players to ensure that these services are available for the Operations Team to leverage. They ensure that the program operates efficiently and effectively and that all players are collaborating.

b. BRE Infrastructure

Loosely, the BRE Infrastructure can be defined as the organizational collaboration necessary to operate a Business Retention & Expansion program. It represents the interactions between the Operations Team, Action Team, and Response Team; any strategic relationships necessary for general operations. It is a set of agreements, whether formal or informal, that dictates how these teams interact and support one another in the operation of BRE. The Management Team’s objective is to curate and administrate this infrastructure; making sure everything is in place so the Operations Team can use and deploy their partners to solve BRE issues.

The Management Team aims to align BRE organizations. Internally this means making sure the Operations Team is aware of the programs and resources it has available through the Action Team. This means creating arranging Action Team organizations and providing a clear understanding of joint responsibilities. Further, this means reaching out to key decision makers so that they can assist with the Response Team. Before the program even becomes operational, it is important to reach out and organize the Action Team members. Organizing the program is about getting widespread support so that the Operations Team can respond to more issues. The more tools you have available through the Action Team, the better the client can be served.
c. Action Team Induction and Engagement

The Management Team’s duties involve inducting new members and organizations into the Action Team. The process is relatively straightforward and a smooth induction process will help them contribute to the success of the program. Action Team induction is all about relationship building, helping your external partners feel connected and responsible for the success of the program. To do this, it is valuable to impart them with their roles and responsibilities, to help simplify their position in the larger framework.

The first step is building mutual comprehension. To induct a new member of the Action Team, you should meet with the individuals responsible for handling the referrals and introduce them to the program. You need to help them get a grasp on how visitation and referral work, and how they play into the system. Further, you should take care here to understand exactly how they can contribute. Get to know their programs and offerings and explicitly ask the Action Team member what their ideal referral company would look like. Identify the businesses they are looking to target and problems they are trying to address. Make sure to express this information to the Operations Team as well to prevent confusion and ambiguity. Once you understand how their programs operate and they understand their role within the program, the referral processes will occur much more smoothly.

Next, make sure the Action Team members understand their responsibilities. Maintaining a strict response timeline will help keep the program running smoothly and keep business clients engaged. The Action Team member should have a clear idea of what is expected of them and what sort of clients they can expect. Introduce them to the necessary software (see CRM Software 10a) and run them through an example referral so they can understand the process. Make sure they are aware of how to track and manage the referral and provide follow-up metrics and results. Once they are familiar with their roles and duties, they are ready to be a part of the Action Team. Ensure each party clearly commits to one another and understands what is expected of them; a shared services agreement assists in formalizing the relationship between organizations. Further, this agreement should cover the topic of confidentiality; all private and company information shared to Action Team must be protected from disclosure. Action Team members must be aware that they are expected to keep the information they receive in confidence and protect the privacy of the companies they serve. Confidentiality is an important part of any shared services agreement.

However, the process does not end here, it is always ongoing. Meeting regularly at least once a year with each of the Action Team organizations and its members will help ensure that they feel like a part of the team. These regular meetings are a great way to introduce and familiarize the Action Team with new members of the Operations Team (and vice-versa). It is also useful to check-in on the types of referrals they are getting. Note any program or offering changes, either new or modified services which they can provide to the client. Also, ask them if they are being referred the right sorts of companies and how BRE personnel are living up to their end of the agreement. It may also be useful to ask them if they have potential clients in need of referral to your BRE program; Action Team members may be aware of businesses that you can assist. The point of these meetings is relationship management and regularly checking in will help keep the Action Team engaged.

Overall, this is a reasonably easy process, though there are often a lot of players involved. Once the Action Team is established, the Management Team’s chief responsibility is to help maintain these relationships and make sure all the organizations and interacting fluently.
d. Marketing & Communications

Part of the Management Team’s role is to coordinate community outreach through Marketing & Communications. This involves reaching out to funding partners and stakeholders in the community to express the value, purpose, and positioning of the BRE program. There are several tools and metrics used to help communicate this value (see The Role of Marketing in BRE 11a).

In particular, the Management Team should look at how it can leverage its Marketing & Communications and reporting roles to build a more cohesive Action Team. Part of building the Action Team is ensuring that they benefit from the arrangement; this can be done with competitive intelligence. While they will not be able to access most of this information for confidentiality reasons, communicating data in an aggregate form will help solidify them as part of the network. One of the Management Team’s main concerns is to ensure that the many players in BRE feel like a cohesive team. A good method of providing value to these organizations is to provide customized, aggregated reports and give them a look ahead at emerging trends.

e. Resource Allocation

One of the Management Team’s duties is to determine how to leverage funding for the BRE program. Understanding the needs of the program and how each of the elements creates an impact will be useful in getting the most effect out of limited resources. More so than any other part of the organization, the Management Team needs to understand the roles of other parts of the group and how they interrelate. Several sections of this report underline some of the main funding needs and impacts of the BRE program:

- Sections 7, 8, and 9 explain the roles and responsibilities of other teams;
  - Understanding how other Teams interact in the context of BRE will be useful in assessing their needs and operational concerns.
- Section 12a explains the staffing requirements and compositions of BRE programs in two different cases;
  - This provides a conceptual explanation of how a BRE program 'scales-up' and which roles exhibit larger returns to scale than others.
- Section 12b, 12c, and 12d explain some of the hiring and skill concerns of various positions.
- Section 5f explains how additional programming can be spun-off from BRE;
  - These programs will often have staff and resource needs of their own, though they provide opportunities to attract project-based funding.

Another key part of Resource Allocation is understanding how resources are deployed through BRE. The Management Team sets the large scale goals for the program and determines which objectives are pursued. Unlike Account Executives or members of the Action Team, the Management Team is abstracted from the individual business process and can take a look at the bigger picture. This is important, as many BRE programs are occupied by day-to-day activities. Looking at how the program operates and what larger scale problems can be addressed is one of the best uses for BRE data and experience. Take the time to consider how resources and efforts can be allocated to tackling larger, systemic issues. The Management Team’s relationships with key decision makers in the community can help immensely here.
7. The Operations Team

This section explains the purpose of the Operations Team. It outlines their roles and responsibilities, and how they can contribute to the success of the program. As the linchpin of the organization, anyone involved in BRE activity should focus on this section.

a. Roles and Responsibilities

The Operations Team is the bread and butter of a BRE program. They ensure that companies are visited, information is gathered, referrals are sent, and overall progress is made; they are an irreplaceable element of the system. In the continuous model especially, long term gains are made from improvements in the Operations Team. As the Account Executives become more experienced and network with the business community, the program will operate more efficiently. An Operations Team which is ‘plugged in’ to the community will function well. The Operations Team is composed of Account Executives, each of which operates as an autonomous correspondent between the many Action Team organizations and individual business clients. Their roles include:

- Initiating and undertaking site visitations in order to diagnose client issues;
- Gathering, recording, and verifying business data gathered from client visits;
- Connecting referrals from business clients to the Action Team, including follow-up referrals;
- Maintaining general awareness and understanding of programs offered by the Action Team;
- Building relationships with the local business community; and,
- Notifying the Management Team of red flags, trends, and opportunities.

The Operations Team must be aware, both of the program’s capabilities and its own actions. Members must coordinate their efforts to prevent a company from being approached multiple times from different agents. At its basest, the Operations Team’s primary role is ‘determining who the client should be interacting with’ (see General Framework 4a). They are the initial point of contact, they determine which Action Team members to refer a business to, and they start the process of engaging the Response Team around red flag issues; all to deliver seamless delivery to the business clients. As an entity they also have a large degree of autonomy and organizational reach. The Operations Team is self-guided and should be capable of acting with independence.

b. Account Executives

The Operations Team is made up of Account Executives, the linchpin of the organization. Most of the activity in a BRE program revolves around the day-to-day connections and referrals they make. Each Account Executive is accountable for the entire Operations process. They walk business clients through the process from start to follow-through and serve as a common point of contact. This means that in order to keep the program running smoothly the Account Executive must be capable of operating independently and with a high degree of autonomy. It is vital that they are connected directly to members of Action Team.

Growth and experience of the Account Executive is critical for the long-term success of the program. As they make more connections and become more connected to the business community, they will become more sought after by businesses. Their familiarity with available programs and incentives is useful, as they should be able to identify the appropriate tools and referrals for assisting a business. As they become more comfortable
with these tasks, they program will run more smoothly. In the long term, an Account Executive should be focusing on two broad objectives: what tools their BRE program has available, and how to improve their relationship/network with the business community.

c. Engagement through Listening

As an Account Executive it is tempting to delve headfirst into a company’s problems and begin offering solutions and advice to the client. It must be clearly understood: this is not an Account Executive’s purpose. The Account Executive should spend most of their time listening to the client, guiding conversation only when it’s necessary to illuminate a company’s underlying problems. Once the issues are clearly understood, they can be connected to the Action Team through referrals. The Account Executive is a referral specialist; not a Business Advisor.

Business owners may not be immediately capable of listing and identifying the barriers they face, even if they have a firm grasp on their company. The survey/diagnostic tool provides a very in-depth list of questions and topics, and can be used to help guide discussion and record information. However, simply asking the company each of the questions in sequence would be very inefficient. It is up to the Account Executive to notice when a business is concerned about an issue and hone in on the topic.

It is crucial that they listen to their clients and be willing to engage with them, without impeding the flow of conversation. While it may be tempting to provide business analysis and solutions directly to the client, it is more important to attain a thorough diagnosis of the client’s principle issues and to gather information in order to make proper referrals. The Account Executive must excel at actively listening to their clients. Listening to the client, understanding the direction they want the conversation to go, and engaging on that topic will help lead to productive and valuable conversations.

d. Targets, Planning & Strategy

As with any outreach program, choosing which businesses to engage with will be a valuable and strategic decision. Targeting businesses of a specific size, sector, or type may help illuminate problems which are size/sector/type specific. However, the decision to pursue one type of company comes at the expense of gathering information from others. This means that priorities must be set for which businesses to engage. Unlike a more top-down model, Account Executives need a high degree of autonomy. New information and patterns emerge from conversations in the site visitation process. This means that Account Executives will be the best and most readily informed members of the BRE program. A nimble and adaptable program will be better able to manage business needs, meaning that if specific targets should be pursued, it is the prerogative of the program to pursue them. The Account Executives will be able to shift their focus to have the greatest impact, and so should have the autonomy to set a strategic agenda.

In many aspects of the program design, investing power and autonomy in the Account Executives will help make the program more adaptable. Further, constant communication is needed between the Actions Team and the Operations Team. Giving some level of authority to the Account Executives will help them deal with members of the Action Team more easily. This facilitates more fluent communication and reduces administrative burdens between organizations.
8. The Action Team

This section explains the purpose of the Action Team. It outlines their roles and responsibilities, and how to identify which organizations and individuals should be selected for the Action Team. It is a key component of the overall program and should be understood well in advance of the program being formed. Program Managers and Executive personnel should focus on this section.

a. Roles and Responsibilities

The Action Team is the workhorse of the BRE program. Their primary role is to respond to an Account Executive’s referral and provide a pre-arranged service/program to the referred business client. Overall, the Action Team provides the Operations Team with a suite of services they can call upon to assist businesses. The Action Team itself is not an organized, monolithic group; it is a collection of individuals representing what is known as a ‘client services network.’ The roles and responsibilities do not belong to the Action Team as a whole, but to each of its individual members; these include:

- Responding to referrals from the Operations Team;
- Maintaining a quick response timeline, typically no longer than 48 hours;
- Carrying through on business services as part of a referral;
- Informing the Operations Team on the state of referral progress; and,
- Keeping the Management and Operations Teams aware of program changes or new programming.

It is often useful to create service agreements with Action Team organizations to explicitly define individual roles and responsibilities. The agreement should establish a clear understanding of expected response timelines. If the members cannot achieve a sufficient response time, it is the Management Team’s prerogative to find alternative solutions. The Operations Team relies on quickly connecting business clients to solutions through referral; defining this relationship with the Action Team member early on is essential.

Action Team members use Executive Pulse in order to report the status of a referral. This does not divulge specifics about a service, but is used in order to keep the Operations Team apprised of the situation. Action Team Members are expected to identify when they have made contact with a client, when they have concluded their business, whether the program was able to resolve the client’s issues, and what impacts resulted from the assistance (including jobs created or retained). This is done to keep the Operations Team aware of whether or not the client will need follow-up assistance and prevent clients from slipping through the cracks.

b. Action Team Members

Action Team Members are individuals within exterior organizations. They are decision capable experts from the government and private sector that resolve business issues. These experts are selected to provide a specific service to business clients who are referred through a BRE visitation. As the Operations Team identifies opportunities for businesses to utilize these programs, they make referrals to an Action Team member. When a referral is made, it is that member’s chief responsibility to quickly respond to the business client.
When an organization is identified for the Action Team, there are a few considerations. It is important to engage with a relatively small group, typically only 1 or 2 individuals within that organization. This helps maintain accountability and builds a working relationship with the Account Executives. These members should also be relatively senior within their organization. They need to be capable of seeing the referral through to completion, and connected enough to be able to reach out within their organization when additional help is needed.

**c. Action Team Selection**

A BRE Program can only be as useful as its Action Team; it must be very robust. Properly selecting the organizations, programs, and connections for an Action Team determines the scope of what a BRE Team can accomplish. Organizations have programs that they offer to businesses and they should be selected based on these services. When this programming changes, Action Team organizations should communicate these changes to BRE staff so that both parties understand their purpose and intended targets.

Organization selection is an integral part of building the Action Team and there are three main considerations. An Action Team should have as robust a selection of services as possible, it should avoid duplicative programs, and it should avoid the perception of favouritism in the private sector. Generally a client services network is modelled after the problems it resolves. Identify the potential business issues that can arise and whether solutions exist within the community, then choose the organizations that offer programs which resolve or alleviate these concerns. Provincial and Federal government agencies tend to be ideal candidates for Action Team members. The following is a list of some of the common topics that may require a referral to resolve:

<table>
<thead>
<tr>
<th>Access to Capital</th>
<th>Business Planning</th>
<th>Commercialization</th>
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<tbody>
<tr>
<td>Entrepreneurship/Mentoring</td>
<td>Export Development</td>
<td>Government Procurement</td>
</tr>
<tr>
<td>Access to Labour</td>
<td>Industry/Sector Associations</td>
<td>Local Networking</td>
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<tr>
<td>Municipal/Provincial/Federal Policy</td>
<td>Post-Secondary Education</td>
<td>Research &amp; Development</td>
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<tr>
<td>Transportation &amp; Logistics</td>
<td>Utilities</td>
<td>Workforce Development</td>
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The provincial departments of Labour and Advanced Education, the Procurement Services section of Internal Services, and other departments already collaborate in the BRE process and are valued members of Action Teams. They will make ideal candidates to add to your own team and you should reach out to them when you are looking for early adopters. The staff located in satellite offices across the province will be taking on an integral role in connecting programs and services to clients which will support regional economic development in Nova Scotia. More examples of departments that could assist in BRE are available in the Additional Resources section (see Potential Provincial and Federal Partners 14a).

Maintaining and expanding the Action Team is a constantly evolving process. Don’t be afraid to make a few mistakes with the Action Team, as building and rebuilding the team is a constant process; what is important is maintaining the relationships. As more programs and organizations become available, you can adjust the team to suit your needs. The more experienced you become with the needs of businesses in your community, the better you will understand the needs of your program. The Operations Team will be able to identify gaps exist between business needs and the tools available.
9. The Response Team

This section explains the purpose of the Response Team. It outlines their roles and responsibilities, and how to create and deploy key decision makers around red flag issues. Program Managers and Account Executives should focus on this section so they know what to expect from the Response Team.

a. Roles and Responsibilities

The Response Team is a group of high-level, decision capable individuals within the community who can be mobilized to respond to critical issues. When a red flag arises, something like the threat of a major or immediate closure, the BRE program needs to be able to act quickly to resolve issues. The Response Team is the answer to this sort of problem. The team consists of a number of key decision makers who make themselves available to tackle crises and significant opportunities identified through the BRE process. It can include members already on the Action Team, senior local government officials, or any number of high-level specialists. Their roles are:

- Responding to requests from the Management Team in case of an emergency;
- Meeting directly with the business client around crises or high-value opportunities; and,
- Leveraging the tools and influence they have within the community to assist the client.

Unlike the Action Team, the Response Team does not focus on individuals who are needed for general programs and services. Instead, they tend to be those who can significantly influence or impact their community and impel policy movement or significant resources to respond to ad-hoc situations. It is important to be able to reach out to potential Response Team members when a crisis occurs. While it is impossible to know what your exact needs will be ahead of time, it may be essential to have certain parties at the table. Building strong ties with local decision makers and key partners in advance of a crisis will help smooth the Response Team process. Business clients may require policy action, so it is important to make the connection with someone who is capable to impelling changes within the community.

b. Identifying Red Flag Issues

The Operations Team should constantly be on the lookout for red flags. These are situations where their visit with a company reveals a major problem that the Action Team cannot address. Red flag issues tend to be fairly rare and represent either a crisis or a large expansion opportunity. Due to the difficulty in arranging and mobilizing this resource, a Response Team should be considered a tool of last resort. However, there may be cases where the tools provided through the Action team just aren’t sufficient or applicable.

The Operations Team is responsible for identifying these issues, and they typically emerge from a BRE visitation. In the course of interviewing a company, information may be revealed that underscores a major systemic issue for the company. In other cases, it can be much more direct; a major business clearly expresses its frustrations and is in the process of leaving. In general, a red flag issue is one where no combination of programs and Action Team referrals will be able to resolve the issue, and where an inability to achieve resolution presents a significant and imminent danger to the local economy. Red flags may occur because of high-level policy issues, the inability to qualify for typical programmatic assistance, or any number of other issues. However, when they do occur the BRE program needs to be ready to act.
c. Organizing the Response Team

A red flag situation is a crisis; it presents both a challenge and an opportunity for a BRE program. Each situation will be different from the next and the composition of the Response Team will change to suit the circumstances. The individuals on the Response Team are external to the organization and will typically be very important members of the community with many demands on their time. This makes it difficult to organize and deploy the Response Team but can also present an opportunity for the BRE organization. When it is necessary to deploy a Response Team, a quick and efficient mobilization can be a defining moment for a BRE program. There is a detailed explanation of the deployment process in General Operations (see Red Flag Mobilization 5e).

Being able to leverage key decision makers in the community requires a lot of preparation and strong relationships. There are a few useful actions which may help improve the chances of reaching these individuals in time. Firstly and most obviously, make sure these decision makers are aware of the BRE program and what it is meant to do early on. As the program develops, make sure to engage with senior level officials. Show them the value of the program and how it helps bridge connections between the business sector and the local community. Asking someone to participate in a program they are unfamiliar with is difficult, so it should be a priority to introduce potential Response Team members to the program before a crisis occurs. A level of familiarity can help immensely when asking these individuals to contribute later on.

Secondly, build a working relationship with these individuals and their organizations. A continued, positive level of interaction will make a difference in how they see the request to join the Response Team. A program or organization that they regularly interact with and are aware of will help foster a sense of camaraderie. The information gathered through BRE is a good way to show value. Regular reporting and outreach into the community, using the aggregate BRE data, is one way to help build support for the program. Providing this same information to key decision makers and senior level public figures can help keep them in the loop and engaged with your organization.

Finally, help rally support by engaging the Response Team around the central crisis idea. Take note of the consequences for failing to intervene and the impact that success will have on the community. The central figures who have become key decision makers are often driven to make a difference in their community. They have a vested interest in seeing it thrive and succeed economically. Presenting the Response Team as a duty to be performed can be seen as a burden. Instead, their involvement should be seen as a way to empower those individuals to make a difference and have an impact. Position the Response Team as an opportunity to take part in economic development in a direct, tangible way.

Together, these processes should help organize the Response Team. The key to succeeding in a crisis is having the right people at the table. Getting key community leaders and decision capable specialists involved and engaged in solving the problem will make a huge difference in finding a solution. Crisis scenarios require every resource the community can offer, and getting the leadership involved is the surest way to reach a solution.
10. The Data Network

This section is designed to introduce the reader to Executive Pulse, the program’s CRM software and how it can be used to assist the program’s operations. It explains what the software does, how it can aid in the analysis and use of BRE information, and how it can be used to help further position the BRE organization. Focus on this section if you are unfamiliar with how CRM systems apply particularly to BRE.

a. CRM Software

Executive Pulse is a commercial CRM software suite that is used by DMA and the Halifax Partnership to manage BRE activities. It is a constantly evolving tool and this iteration has been used, adapted, and built to suit the Nova Scotian context over the course of a decade. The tool is explicitly designed to assist a BRE program and is run by professionals with a vast array of experiences in the field. Executive Pulse is an intricate part of the program model and will help manage, track, and facilitate the entire BRE process. The software is an online tool and can be accessed through any internet browser. It allows every member of the BRE program to interact with one another and enables the exchange, protection of, and management of data. Account Executives, Program Managers, Data Support, and even Action Team members use this CRM system to facilitate BRE activity.

Executive Pulse provides the user with several essential tools that will assist with BRE. It is integrated with Outlook and scheduling tools so that meetings and data can be coordinated between systems. It serves as a database that is used to store and organize data gathered from retention visits and other BRE activities. Its referral system enables Account Executives and Action Team members to coordinate with one another and track requests over long periods of time. It provides an access hierarchy which is sensitive to confidentiality, with specific consideration for the needs of a BRE program. It even provides a powerful search tool to analyze and manage large and complex data sets. Finally, and most importantly, the system is managed by engaged staff that have proven they are capable of adapting the system to meet a program’s evolving needs.

Executive Pulse offers information to a variety of different users, who will have different levels of access to this information. It is essential that those who are given access credentials to the system must first clearly understand the privacy and confidentiality concerns associated with the data. Depending on their level of access, they may be privy to protected information. More information on this topic is available in the General Framework (see Confidentiality & Data Control 4e).

Account Executives primarily use the Executive Pulse system to log their contact with business clients, to record and input information gathered during retention visits, and to make referrals to Action Team members on behalf of companies. This allows them to recall any relevant information about previous clients and follow up more effectively; it even allows them to see when a referral has been closed so that they can re-engage a client. Executive Pulse essentially serves to coordinate data and activity between members of BRE teams. The data hierarchy ensures that when a referral is made to an Action Team member that relevant information is accessible while confidential information is protected.

Executive Pulse is a data driven program and Account Executives should be diligently recording their findings from the visitation process. The Account Executive’s visits provide the raw information which allows for the measurement and aggregation of information. Given their conversations and the full breadth of interaction with
the business client, an Account Executive uses the Diagnostic Tool to record what they have learned. The system’s inputs are designed explicitly to mirror the tool; the two are linked. The tool is meant as a way to consistently interpret and format information gathered from conversations with business clients. Once recorded in the system, data can be compared and contrasted for analytical and reporting purposes.

b. Analytical Roles

Program Managers and Data Support Staff will be able to access the information and aggregate it to suit their needs. This allows them to investigate the large scale picture and identify trends within the data. By comparing information from visits across multiple Account Executives, they can note where Company Common issues arise and similarities between certain businesses occur. Given the proper context, this sort of information is incredibly useful for informing programming and tackling much larger scale issues.

This analytical function is primarily performed with Executive Pulse’s search tools. These allow the user to gather information on any of the BRE program’s data sources. Data can be drawn from retention surveys, referrals, information reported back by Action Team members, and a large selection of other data sources. For example, the data can be used to identify and categorize what types of referrals are used to assist businesses. The picture below provides a visual example of the various categories users can access and aggregate across. The Power Search provides a robust method of breaking down or aggregating data sets using the gathered information. Once selected, the information can be further drawn or condensed by date, by location, by industry, and can even be made into comparisons of multiple groups. The tool is robust enough for even complex analytical tasks.
These analytical tools are used for identifying trends. Recognizing patterns within the gathered information allows the program to identify where Company Common Issues occur and get at what some of the underlying factors may be. The analytical role of the data is to look at the broader perspective of BRE. Some issues just cannot be resolved in the context of day-to-day operations, and taking a broader look at visitation may reveal incredibly valuable information about local businesses. The CRM system provides all the tools needed to record and analyze the data gathered through BRE visits.

c. Reporting Roles

Being able to assess data in the aggregate will provide the opportunity to share this information externally. Action Team organizations and key stakeholders can use the data to inform their own programming and help empower the community, just as the BRE program can. Once the information is abstracted sufficiently such that individual companies cannot be identified, it can be deployed through a number of different venues. Typically, this takes the form of a regular analytical report delivered to stakeholders, as is described in the Marketing & Communications section (see Stakeholder Reporting 11b). However, this data can also be used to help fuel productive conversations with key decision makers.

The holistic commentary and findings can be just as valuable as the quantitative data. Recognizing business concerns promptly or even identifying industry specific concerns can help provide external organizations with the information they need to impel change. Further, the data can be used to help fuel confidence. Making some of the aggregated information available to the public can allow the BRE program to identify positive developments in the community. The information is as useful as you make it, and finding new ways to leverage the stream of data will help drive value for the organization as a whole.
11. Marketing & Communications

This section serves to relate Marketing and Community Outreach concepts to BRE. It explains how Marketing efforts can assist a BRE program, as well as how marketing collateral can be useful for garnering support within the community. Focus on this section if you are unfamiliar with managing a BRE program, involved with the organization’s marketing efforts, or involved in tracking and reporting of the program’s activity.

a. The Role of Marketing in BRE

Marketing & Communications are part of any program; BRE is no exception. Providing accessible information about the performance, value, and impact of the program allows the organization to rally support and further involve the community. As an economic developer, communicating the value of the organization is a regular part of operations. There are three significant tools which assist Marketing & Communications roles:

Firstly, stakeholders will want to know what businesses think; how they perceive the business climate. While specific commentary and individual opinions are confidential, common themes will emerge. The experiences of the Operations Team and connectivity to the business sector are useful for economic development. The close connections to business provides a unique perspective that is valuable to government and private stakeholders alike, one that outreach programs and public opinion polls do not provide. The information is candid, if at times outspokenly honest and critical. The conversations are confidential; they represent the sentiments that are only spoken in boardrooms and behind closed doors. Account Executives get a look at the actual lens that businesses use to make decisions, their private opinions. Many firms will share certain sentiments, even if they won’t outright say them publicly. Stakeholders are interested in what the business sector honestly thinks.

Another important tool for Marketing & Communications is a CRM system such as Executive Pulse. It provides a way of tracking metrics of success and is useful for preparing outward facing reports. The data from BRE visitations also provides valuable competitive intelligence to local policy makers. Information specific to companies cannot be used for confidentiality reasons, but aggregation provides a way to measure and illustrate trends within the economy. Retention visits provide very detailed information to the Account Executive and the BRE Survey Tool is used to measure and record valuable information. Once a sufficient number of visits have occurred, the information will be robust enough to look at many different parts of business operations. Data is gathered on common themes, trends in the local business climate, opinions of municipal services, major export markets, and many other topics. This information is a tool to provide value to policy makers and key decision makers. Providing this information to Action Team organizations, local government, and community stakeholders will be an integral part of establishing the BRE program as a foundational element of local economic development.

Lastly, some companies are also willing to provide success stories or testimonials of their interactions with BRE programs. Relating these success stories to potential investors communicates the value of the organization in an accessible way and provides concrete examples of activity. They can be used to help drive investment and new capital into the community, to sell the importance of the BRE organization, and to inspire confidence in the local business climate. Showing concrete examples of success helps identify and express what is valuable to the business sector and what they value in the community.
All of these tools can evaluate the program and sell the importance of BRE to gather strategic and financial support from community stakeholders. Whether the platform for release is regular social media, direct meetings, or more traditional media outreach, a BRE program should express its value. Consistently reporting out successes and program impacts shows that the organization is constructive, transparent, and efficient.

b. Stakeholder Reporting

BRE is a community driven initiative; it is about building relationships and engagement at the local level with the business sector. To that end it intrinsically important and very valuable that the BRE program regularly show its worth to the community. The RENs will no doubt have a number of key stakeholders and organizations which support its activities and BRE provides a tool to give those groups something of tangible use. The information gathered through BRE, both holistic and quantitative, can be used to help empower the community. Creating a medium to reach out and report to stakeholders will help drive support for the program while helping the community to be more aware and informed about the needs of its local businesses.

It is important to create some collateral that broadcasts BRE data in a useful, consumable format. These sorts of reports are visible, tangible tools that can greatly supplement more traditional outreach. A brief summary of aggregated BRE information, metrics of success, and up to date holistic trends will help drive home that the BRE program engages business and collects valuable information. Below is an example of the information that can be extracted for collateral that the Halifax Partnership’s regularly implements (this example uses artificial data):

The information is visual and the commentary can be customized to fit its audience. These sorts of reports are of particular use because this information comes from a very forthright source. BRE visitations are very personal and confidential conversations; companies tend to be honest and outspoken. Even if they might otherwise be very reticent to provide their opinions, the format of BRE tends towards companies speaking their mind and expressing their private opinions. When this information is aggregated it often reveals a much more useful
picture than typical public polling as it gets at the lens businesses actually use to make decisions. This level of connectivity, often established over a long period of time, can be invaluable for getting at the deep seated notions and assumptions underlying the business climate. It also provides a base of contact with the business community, useful for organizing events, rallying companies to a cause, or just gathering input.

Another important part of this information is that it is gathered confidentially and discretely. For organizations that operate under a high degree of media scrutiny, it may be valuable for them to attain information without having to involve public media sources. This allows them to rectify issues with their programming or services without the adjustment becoming a press event. Being able to present this information, obviously with great care for confidentiality, can help inform and drive programming throughout the community. The ability to provide this information is a high priority, high value asset that should be leveraged regularly.

c. Monitoring Your Program (Metrics)

Part of any community process is being able to track activities and ultimately show value to your stakeholders. For BRE, this means being able to track and report on the program’s indicators, but this will be part of a larger REN monitoring and evaluation framework. The Department of Municipal Affairs will set reporting standards for REN monitoring and evaluation including inputs, partners, activities, targets, indicators, and results.

An indicator is a measure tracked systematically over time that indicates progress toward a target. The BRE model facilitates the measuring of several indicators, which will help portray and contextualize the value of your program and your organization’s progress towards its goals. These indicators, within a larger evaluation framework, will help you know how to identify success. It will also help you to continuously improve while learning from your experiences and the experiences of others. It is important to know that the information you collect also helps stakeholders better understand the business climate and can be used to identify trends, leverage opportunities, confront challenges, and inform economic development programs at community, regional, provincial, and federal levels.

A series of quantitative indicators are used to monitor this BRE program’s activities and evaluate results. In the REN context, it is vital that these measurements remain consistent throughout the province. This allows information to be aggregated and results to be compared regionally. It allows RENs to show their successes to one another, to identify those who excel and learn from their innovations. There are currently six indicators used to quantify this BRE program. Each metric also includes a technical description of how this information is gathered through the Executive Pulse CRM software:

- **Jobs Created and Retained**: Showing the value of the program is partly about measuring how it improves the economy, and the labour force is generally considered a valuable indicator of economic impact. This measure is reported by the business client, either directly to the Account Executive or through an Action Team member’s referral. The total number of full and part time jobs that are created and retained should be indicated across all business clients. Generally this number serves as a lower bound for the economic impact of the program, as it only represents the impacts that are reported back to BRE staff.
  - Measurement is obtained using Metrics Surveys, by Effective Date, as the sum of full and part time jobs created as well as full and part time jobs retained.

- **Retentions & Expansions**: These two metrics measure where the program prevented an impending decline or removed a barrier to an expansion of a company’s operations, respectively. The measurement
is reported by Account Executives, but in each case they must be able to demonstrate where the organization impacted the company’s outcome. Account Executives should ask themselves: “Are we, or our Action Team, removing a barrier that allows this company to expand, or continue its operations?”

- **This metric is measured on a case-by-case basis. Retention Surveys which indicate either a high risk of closure/downsizing in the next 1-3 years or a possible expansion in the next 12-18 months (respectively) are nominated. Nominations where Account Executives can identify that they had a level of impact in either retention or expansion are counted for this metric. Retentions and expansion are attributed to the date in which the Diagnostic Visit occurs, though this is often adjusted retroactively as there is a gap between when the visit occurs and when the retention or expansion can be accurately verified.**

- **Diagnostic Visits (sometimes Retention Visits):** It is useful to monitor how broadly the program reaches out to the business community. Therefore, there is a metric measuring the most fundamental activity and engagement with a business. It accounts for the initial visitation process and diagnosis of the client. Each Diagnostic Visit is typically an hour to an hour and a half conversation where the Account Executive gathers information on the business with the intention of making referrals. In most cases, a business client will be met with several times. Only the first major visit each fiscal year, where the Diagnostic Tool is implemented, should be considered a Diagnostic Visit. Other visits would fall under Business Consultations, as they represent supplementary activities.

- **Measurement is obtained using Retention Surveys, by Date of Meeting, and is measured as the sum total of Retention Surveys gathered in a given time period. Only one Retention Survey per unique establishment is counted each fiscal year.**

- **Business Consultations:** It is important to measure not only the number of business clients, but the thoroughness through which the BRE staff engage with those clients. To measure this, a metric is used to indicate supplemental engagement and follow-up activity. It looks at the number of meetings and conversations between the Operations Team and a business client outside of the context of the initial Diagnostic Visit. This activity generally represents any substantive engagement which occurs either to re-engage or re-diagnose the client following the first wave of initial referrals.

- **Measurement is obtained using Journal Entries, by Start Time, and is a measure of the sum total of Journal Entries which occurs in a given time period.**

- **Referrals Generated:** A large part of the BRE process revolves around the implementation of the Action Team. As such, part of measuring the success of the BRE program is measuring how effectively it can bridge the Action Team and its business clients. This metrics encompasses all authorized referrals made by the Operations Team to request Action Team intervention.

- **Measurement is obtained using Action Items, by Start Time, and is a measure of the sum total of Action Items which were initiated in a given time period.**

These six metrics form the basis of this BRE program’s indicators and should be consistently conveyed across regions. While the language of these metrics may evolve to better describe the activities, the methodology should be maintained. You may also supplement these with qualitative measures, such as BRE client surveys.

These indicators are not the only information that you will be recording and are only part of ERDT’s larger evaluation framework, but they flow naturally from the BRE Program and its existing capabilities. They will provide common units of measurement for evaluating, portraying, and continuously improving your BRE program. Ensuring consistent units of measurement allows RENs and the Halifax Partnership to learn from one another’s successes and confidently broadcast their accomplishments.
12. Training & Recruitment

This section acts as a set of suggestions for establishing a BRE program. It explains the staff framework of BRE operations and how they scale up, the skills and competencies that are needed to excel in particular roles within BRE, and generally the sort of considerations one should make when hiring someone for a BRE position. Focus on this section if you are considering hiring staff for a new initiative, expanding a current program, or investing in staff training.

a. Staff Compliment

Managing a BRE program requires understanding its human resource needs. As the program grows and evolves, some roles will become more important and have additional needs. Therefore it is useful to understand how staff positions scale; how hiring more of a specific role will improve the output of the program. To this end, two staffing models have been provided; one for a very small scale or introductory program and one for a medium scale or fully functional program. These models are less about specific staffing recommendations, as they are about understanding how the program can evolve and grow.

Small Scale Model

Management Team: Existing EDO management
Operations Team: 1-2 Account Executives
Support Staff: Shared services or contracted media support, networked data support
Action Team: 10+ key organizations at minimum, quick expansion to 20 Action Team organizations.

The Small Scale Model illustrates how an introductory program should look. At this point, staffing levels and community buy-in are very low and the program only has the financial resources for a limited outreach. Given the overall size of a new organization, dedicated management for the program will likely not be necessary for a smaller program. Using the EDO’s pre-existing executive as the program’s management team should suffice. This is especially true because Account Executives tend to have a lot of autonomy. Program Managers can supervise a large number of staff and initial levels of activity should not put much strain on management resources. It should not be necessary to get a dedicated Program Manager until community buy-in increases.

In terms of Operations, at least one Account Executive is needed for the program to function. When increasing staff capacity this area is the main priority. Generating staff capacity in this area is desirable, as Account Executives represent the ability of the program to generate impact. If the initiative has a dedicated Program Manager but a small number of Account Executives, consider having that manager take part in visitation and referral processes and act as an Account Executive part-time.

Given that many of the supporting roles such as marketing and data support have fixed activity levels they will represent a large share of costs, even with a small program. They are important for the program’s success but will require significant initial investment before they can operate effectively. Sharing services with municipalities or other RENs may help significantly offset these high initial costs and cover marketing and data roles.

Finally, though not part of the staff, the Action Team represents an integral part of the operation; one which must be robust and in place in the early stages of the program. Having a small Action Team prevents the BRE
operation from addressing many of the key issues that business clients have. Fortunately, Action Team members represent buy-in and support from exterior organizations, and generally don’t expend internal financial resources. It is necessary to have a few key, broad based organizations supporting the program at the onset, and it is valuable to connect with several individuals who have more specialized roles. Provincial and Federal departments are key, as they have significant programs and resources already in place. However, this will only address some of the potential business issues faced by clients. Even while the program is still in its infancy, reach out to many other organizations, establish partners and build relationships within the community. A larger tool kit allows the BRE program to provide more solutions and be more valuable. Given its facilitating role and familiarity with BRE, reaching out ERDT as an Action Team member should be a priority. Its programs and capacities have a business focus and they will be a valuable support to your BRE program. Reaching 15-20 organizations within the Action Team and providing solutions for a wider array of problems will be an early goal.

Medium Scale Model
Management Team: Existing EDO management, 1-2 dedicated Program Manager
Operations Team: 2-10 Account Executives
Support Staff: Shared services or existing EDO media support, networked data or existing data/research support.
Action Team: Full service suite of 20+ Action Team organizations.

The Medium Scale Model covers a program as it matures. As activity levels increase the program will grow, as will the number of Account Executives and the need to coordinate activities. Also, as the organization itself expands, there may be strain put on the existing management structure of the EDO and they will have to broaden their focus beyond BRE. Eventually the initiative will require its own Program Manager who can focus their responsibilities on coordination and maintenance of the Operations and Management Teams. The large number of organizations assisting and providing services to the BRE staff will need to be carefully managed, requiring personnel who focus directly on the task.

The primary way the program can expand is through staffing a larger number of Account Executives and facilitating the growth of the Operations Team. With increased financial resources it will have the capacity to significantly invest and rapidly increase its effectiveness. This means increasing the staff size, but also respecting the limits of the management resources. As the size of the Operations Team approaches the upper bound of the Medium Scale Model, consider adding a second dedicated Program Manager.

Fortunately, the proportionate costs of support staff begin to reduce in the medium model; the program will have ‘grown-into’ its initial support staff needs. The EDO will likely have reached the point where it has its own marketing apparatus or be part of a larger shared services agreement. There is no reason why an individual program will need a dedicated marketing structure. Using the EDO’s existing Marketing & Communications staff to advertise and promote the BRE program will be more than sufficient for its needs. While there will be a very large amount of visitation activity, the nature of data aggregation means that the data needs of the organization will not expand significantly between the Small and Medium Scale Models. The program can continue to rely on shared services agreements or networked data support to cover its data reporting needs. If the EDO has grown to a point where it has its own research staff, relying on these resources for data needs may also be a possibility.
By this time, the BRE program is well past its infancy stages and will need a full suite of business solutions. If it has not done so already, it should reach out to organizations and resources within the community until it can respond to a vast array of business issues. As many as twenty, thirty, or more organizations may be involved, representing a large number of programs. A large number of individuals should also be engaged to provide more individualized solutions. These specialists, or one-off connections, can greatly improve the capabilities of the Action Team. Given the high amount of Operations activity, it should be a priority to build a very robust program suite and Action Team.

b. Strategic Personnel

Strategic Personnel serve an essential role in the BRE Program. Program Managers and Executive staff must build the organizational relationships necessary for the program to function. Building a robust Action Team and insuring both community buy-in and external support for the program will help it prosper. While in the early stages this can be accomplished using the EDO’s existing executives, eventually the program will grow to the point where it needs dedicated management personnel. These staff must be empowered with the authority to reach out to external players and negotiate on behalf of their organization. They must be able to bring decision makers to the table and convince local agencies to assist the program. This is exemplified by the Program Manager; they must be able to maintain existing relationships and show leadership in forging new ones.

Program Manager

Experience: Management or Administrative.


Most Important Quality: Building and maintaining organizational relationships.

The Program Manager oversees a small staff of Account Executives and keeps them connected to the Action Team. They also help identify useful programs and make inroads with the organizations that provide them. They are first and foremost a relationship builder and are responsible for the program’s social capital in the community. They will be the representative of the program to external audiences and potential Action Team members, as well as a communicator between Teams within the program. Previous experience managing a team and overseeing operations, especially those which required external communications, will help prepare the Program Manager for their role.

A Program Manager should be strategically minded, capable of seeing and understanding the bigger picture and deploying or attaining resources to further this goal. They should be highly organized and capable of moving a project forward in spite of a large number of moving parts. Many of the staff working under them will have a high level of autonomy, and traditional management of individual activities may be very difficult. However, this means that strong leadership skills will be an asset for potential Program Managers.

c. Operational Personnel

Operational Personnel are the bread and butter of a BRE program. They are the direct service personnel who reach out to and diagnose business clients. This role is undertaken by the Account Executive, a role that is central to all of the program’s operations. They are highly involved with other internal teams and most of BRE
activities revolve around their actions. Quickly establishing a few Account Executives will help a program have a definitive impact, and as such finding qualified staff is incredibly important. The most important decision a BRE Program can make, is who to hire as an Account Executive.

**Account Executive**

*Experience: Account Management or Sales*

*Skills and Competencies: Listener, Networker, Personable, Autonomous, Awareness, Follow-Up, Database Management, Individual Relationship Building, Public Speaking.*

*Most Important Quality: Active listening and information retention.*

The Account Executive performs retention visits on behalf of the organization. They deal directly with business clients and serve as an outward facing member of the organization. They must understand how private businesses work and skilled individuals from a private sector background will serve this role exceptionally well. It cannot be stressed enough: they must be very good at listening and retaining information. Their duties require them to engage with businesses, diagnose issues, and maintain productive conversation, all while being as unobstructive as possible.

Growth in the overall program will involve connecting and training more experienced Account Executives. Their ability to develop and expand relationships and networks will be crucial. As such, practiced networkers and those with Sales experience are well suited to this position. However, unlike many Sales positions, the purpose of the Account Executive is to grow stronger, long term relationships with business. Those with specific experience dealing with Account-based clientele will prosper.

An Account Executive is given a high degree of autonomy in performing their job. They must adaptively pursue strategic targets, maintain awareness of the Action Team’s capabilities, and consistently follow up with clients as referrals unfold. Suffice to say, they must have the initiative and ambition to drive their own activities.

It is also important to note that many of the Account Executive’s duties will require the use of CRM technology. Some experience using databases and a degree of familiarity with technology will be useful. They must be aware that data entry, maintenance, and awareness will be a notable part of their role. Using the software to keep track of their activities will be an integral part in coordinating with other teams, both internal and external.

**d. Support Personnel**

Support Staff perform a valuable service to BRE programs and help them take an otherwise stagnant initiative and make it more robust. There are a few key roles that are necessary for maintaining an active BRE program and many of these are outside the scope and skill set of Account Executives and Program Managers. Therefore, the program should consider hiring, contracting, sharing, or networking to these personnel in order to access the valuable skills they provide.

**Marketing and Communications Support Staff**

*Experience: Public Relations or Marketing*

*Skills: Public Relations, Marketing, Communications, Writing, Comprehension.*

*Most Important Quality: Communicating/distilling complex concepts in accessible ways.*
In order to provide the larger community with value, it is necessary to express the worth of the BRE program to external stakeholders. Ensuring thorough, consistent messaging and more effective outreach is the domain of Marketing and Communications personnel. The program involves the need for positioning and message delivery, as well as engagement with the wider community, necessitating both Marketing and Public Relations roles. These support staff should be particularly versed in taking complex subjects and expressing the key, relevant messages behind them. Much of the information collected through the BRE process is technical and difficult to process, so being able to make this content accessible to a wide range of audiences will be an important asset.

BRE involves communication and cooperation from a large number of agencies and organizations. Showing sensitivity to the strategic needs of the program and how core messaging can be adapted will help fine tune the marketing effort. Clear writing skills and familiarity to the program’s diverse audiences will help deliver the program’s key messages.

Data Management Support Staff

*Experience*: Research or Economics

*Skills*: Economic Analysis, Writing, Comprehension, Critical Thinking, Research, Pattern Recognition.

*Most Important Quality*: Critical, analytical mind capable of contextualizing complexity.

The BRE program gathers and processes an immense amount of data. Leveraging this information is what distinguishes a great program from a good program. Having support staff that investigate the information and identify trends in the data will help the program move forward. These personnel should be very adept at recognizing patterns and analyzing information from complex and interrelated fields. Like any research personnel, adaptive learning will be very useful for reacting to new and diverse situations. Much like the Marketing and Communications staff, being able to distil the information into a more accessible form is also valuable; writing skills will greatly assist this effort.

Data personnel should be adept at critical thinking. They need to identify information, consider its value, and be able to contextualize it. These personnel should be able to relate the information to economic concepts and form easily understandable ideas as to the connections between their findings. While it may be sufficient to simply note and report trends, being able to contextualize the information will help the program excel.

### e. Accreditation

*Business Retention & Expansion International* (BREI) is a professional organization dedicated to the improvement of BRE and its practice across North America. It administrates a certification and training process to distinguish highly skilled and trained professionals in the field. It also serves as a source of information on BRE activities, programs, and techniques. Investing in training and certification will be a worthwhile exercise to ensure a rigorous level of comprehension and a fundamental understanding of BRE. BREI upholds two professional designations for practitioners, BRE Project Coordinator (BREC) and BRE Professional (BREP).

The BREC designation serves as general standard for those involved in BRE. Those carrying the designation understand and are familiar with the fundamentals of a BRE program. It provides a certainty that the professional has received sufficient training and is capable of participating and undertaking BRE activities. It also
demonstrates engagement with the larger BREI community. This designation serves as a useful benchmark and is associated with training on BRE fundamentals.

The BREP title is a more advanced designation and indicates that the individual has completed a much more stringent certification process. While it ensures a minimum level of familiarity with BRE activities, it also distinguishes those who have completed a more rigorous set of educational requirements, and have a level of dedication to the improvement of the BRE profession. This certifies an individual who has shown a high level competency and experience in the field.

These designations, as well as training and certification through BREI should be considered important to the organization. They provide useful training opportunities, connections to other BRE organizations/professionals, and serve as a useful way to engage with the wider BRE community. This helps the program, as well as its staff, grow and innovate over time. More information on the certification process and requirements are available through BREI’s website: http://www.brei.org/content/certification.
13. The 10 Most Important Takeaways

This section serves to wrap up the BRE Program Manual. As a note from the author, it provides a brief overlook of the key takeaways and valuable holistic lessons from the document. Focus on this section if you are looking to improve general comprehension around BRE activities.

I would make an argument that it is important to understand the entirety of the BRE process; taking the time to delve deeply into the subject matter will help flesh out a program. However, there are some issues and concepts that, even at a cursory level, must be understood. I’d like to take the time and enumerate the 10 most important lessons that will help a new program. These core concepts will help a new program prosper and can make a significant difference in how an evolving program functions.

a. Top 10 List

1 – Active Listening

An Account Executive’s role in the visitation process is to be an active listener, and to help diagnose the issues faced by their business clients. The Account Executive can contextualize and make inferences from what they are hearing, or ask clarifying questions, but should only direct the flow of conversation in order to hone in on an issue that the business mentioned.

2 – Understand the Diagnostic Tool

The Diagnostic Tool (sometimes BRE Survey) is an Account Executive’s tool for formatting what a client communicates to you, rather than a series of survey questions. Take the time to understand what information the questions are trying to capture, rather than the particular wording and order of the questions as they appear on the survey.

3 – Think Critically

Challenge assumptions about the decisions you make, the questions you ask, and processes you undertake. Part of continuous improvement is looking introspectively at your activities: it is about asking what benefits you derive from activities and at what cost.

4 – Focus on Relationship Building

The BRE Program relies on having long term relationships with its Action Team members; focus on cultivating and reinforcing them. Additionally, Account Executives should build relationships with their business clients. Think of these businesses as long-term accounts instead of short-term customers and help set the right tone early on.

5 – Build a Robust Action Team

The Action Team determines the available suite of initiatives that a BRE program can provide to its business clients. Therefore it is essential to think strategically about which organizations should be selected to assist your program. It’s never too early to start thinking about Action Team selection.
6 – Promote Internal Communication

Make sure it is as easy as possible for Account Executives to communicate with another and that they regularly compare notes. These simple conversations can lead to big discoveries about trends and Company Common issues affecting the business community.

7 – Thank the Business

When the Account Executive finishes their Retention Visit, they should remember to thank the business for operating in the area. This commonly overlooked step can make a very big difference in a business client’s perspective and help them feel appreciated in their community. *This is not hyperbole*, thanking the business often makes a definitive impact on a client.

8 – Look at the Bigger Picture

It is important to periodically step back from day to day operations and look at your BRE findings and data in a larger scope. Take the time to look for systemic (Company Common) issues from business visits and think about how you and your community can and should address them.

9 – Take Data Confidentiality Seriously

A BRE program can be incredibly effective when its clients speak frankly to their Account Executives, but this requires the trust established through a commitment to confidentiality. Companies rely on you to diligently protect their anonymity; you are your clients’ first and last line of defense.

10 – Actively Learn and Collaborate

One of the advantages that a REN’s BRE operation has over other programs of its type is that it is being developed simultaneously in several regions across the province. There will be no shortage of peers and sources of learning for a prospective BRE program. Reach out and get involved with the professional and industry associations, as well as other RENs.
14. Additional Resources

This section hones in on some of the outside considerations for a BRE program. It explores potential Action Team members, the bodies which help push innovation in the BRE community, and topics that can help build a broader understanding of Business Retention & Expansion. Focus on this section if you are familiar with BRE and the model presented, but are looking for resources to continue learning and innovating.

a. Potential Provincial and Federal Partners

When formulating an Action Team there are a number of key partners that should be involved. To this end, there are a few agencies at the provincial level, the federal level, and some private institutions with a provincial scope that can serve as useful partners for all of the RENs. It is important to consider what programs can be leveraged to assist businesses and how Action Team organizations can provide services to the business client. These organizations and their evolving program offerings will create a solid foundation for a BRE program and offer a preliminary level of service.

- Atlantic Canada Opportunities Agency
- Business Development Canada
- Canada Business Network
- Export Development Canada
- Labour and Advanced Education
- Nova Scotia Business Inc.
- Nova Scotia Community College
- Nova Scotia Office of Immigration
- Nova Scotia Power Inc.
- Worker’s Compensation Board of Nova Scotia

There may be additional potential programs and partners, and one should carefully consider how to expand the capabilities of your current action team. Bringing these organizations onto the Action Team greatly enhances the suite of services available through the BRE program. This list is by no means comprehensive, but offers a starting point for those involved in Action Team selection.

b. Business Retention & Expansion International

BREI is the professional organization for BRE practitioners. Its focus is on improving the quality and standard through which BRE is undertaken in communities across North America. The organization acts as the accreditation body for the BRE Project Coordinator (BREC) and BRE Professional (BREP) certifications. Further it offers a robust regimen of training programs and opportunities, as well as a number of events and awards for projects. The organization celebrates and encourages the development of effective practices in BRE.

BREI has a history of involvement within Nova Scotia, having offered large scale training seminars for past BRE initiatives throughout the province. Its foundational programs have served as a basis for the Halifax Partnership’s program and the organization carries an immense depth of experience. Overall, the organization is a valuable source for further learning about BRE.
c. International Economic Development Council

IEDC is a professional and industry association for economic developers. While its focus is not exclusively on Business Retention & Expansion, it is a massive body of knowledge for the industry. IEDC has been at the forefront of recognizing, collecting, and building upon the innovation of communities in order to improve the practice of BRE. It offers training seminars and detailed research on BRE operations and program design. Combined with its extensive body of expertise and connections, IEDC is has built a community of BRE practitioners and is devoted to encouraging innovation.

IEDC is an excellent source of information and examples of economic developers engaging with the business community. It maintains a body of research and actively encourages communities to learn from one another. Its collaborative environment and welcoming atmosphere have helped drive the industry forward. For those interested in Economic Development accreditation, IEDC is the administrative body for the CEcD designation. Anyone interested improving how they undertake economic development should look into IEDC.

d. Economic Developers Association of Canada

EDAC’s mission is to enhance professional competence, advance economic development as a profession, and contribute to Canada’s well-being. They are a professional and networking organization offering development, certification, and educational courses to improve all aspects of economic development. Like IEDC, their training and operations are not exclusively about BRE, though they cover BRE topics. EDAC is also noteworthy for its Economic Development Achievement of the Year; an award open to all EDAC members celebrating excellence and innovation in economic development. EDAC is a valuable source of information and best practices for those interested in continuous improvement.

e. Other Topics in BRE

BRE is a very broad topic and has extensive subject matter. Fortunately, BREI and IEDC have made a conscious effort to collect and disseminate innovative material around BRE. There are a few subjects which are related to BRE activities but do not form part of the core model. For those looking to expand their knowledge on BRE and attain a more thorough level of understanding, these are some of the topics that can be researched. BREI and IEDC are some of the many data sources on these subjects. Broadening ones perspective on Business Retention & Expansion is highly encouraged.

Disaster Preparedness is a common topic that is associated with BRE; it deals with how the business sector readies itself and responds to a major disaster. The connections and relationships built between the business sector and the community are valuable in a crisis. A natural disaster can have a severe impact on the economy and it is a situation that few businesses are familiar with. The assistance provided through a BRE program and the connectivity to the community are ideal tools for addressing post-disaster recovery and pre-disaster preparedness. As a topic, Disaster Preparedness is currently very active in the BRE community and many regions are investigating ways they can assist companies in a crisis. For a BRE program, it is a subject worth looking into to broaden ones perspective.
Export Development is a topic commonly associated with BRE; it deals with how companies can improve their international competitiveness and get involved with selling to foreign markets. In regions where manufacturing and goods production form a key part of the economy, exporting can serve as a great way for a business to expand. As part of the exporting process, companies need to improve and become more productive. This means companies need to understand exports, logistics, and the many ways a business can improve productivity to become more export-ready. A BRE program and its Action Team are excellent tools for addressing these issues, and so BRE programs and Export Development have become more tightly entwined subjects. Further research on Export Development and providing BRE solutions will be useful for any region which has an important manufacturing base.

BRE Finance is one of the more technically demanding but valuable topics associated with BRE; it deals with the applications of credit, structuring, and financing relating to business development. While the topic is less common for extra-governmental economic developers, BRE Finance is a topic that has received a lot of attention in the international community. Understanding capital structures, business financing, and the proper uses of incentives for development can be useful for a BRE Program. An organization does not have to be able to leverage financial resources in order to get value out of understanding BRE Finance. It is a topic worth investigating in detail.

There may be many other topics that can broaden one’s perspective on BRE; these three are meant as an introduction to further research. It is useful to keep an open mind and continue to stay well-informed of how the BRE community is developing as a whole. Being involved in organizations such as BREI and IEDC will help to build expertise and understanding over time.

**f. Future Development of BRE**

Even locally, BRE programs are constantly evolving and the Halifax Partnership is looking for new ways to improve its SmartBusiness program. Several initiatives have been identified which are being experimented with, but cannot yet be evaluated. As the RENs are established, there may be additional information or tools that will be of use for new BRE programs. It will be useful to cooperate and stay engaged with BRE programs throughout Nova Scotia. Each region faces its own unique challenges, but can learn from the experiences of its peers. The RENs should maintain periodic contact and share ideas with one another on how to improve the program as a whole. In the spirit of that collaboration, here are some of the ideas that the Halifax Partnership is currently developing to improve the effectiveness of its BRE program:

*Peer-to-Peer Account Executives*

The Peer-to-Peer approach is a concept that Account Executives can learn from one another and special effort should be taken to ensure individuals do not develop in silos. By periodically meeting with one another and discussing the trends that they experience, Account Executives can identify where systemic issues occur. It allows them to relate their experience to a broader context and compare their work to a typical scenario. It has been used commonly in many other jurisdictions, and organizations within the province have undertaken this approach in the past. As RENs begin to roll out their own BRE programs, it will become a viable opportunity for BRE practitioners once again. It also helps build a sense of mutual comradeship with other BRE practitioners and serves a useful venue for sharing ideas and innovations between organizations. This sort of interaction should
already be occurring within an organization, but it is very useful to meet periodically with external BRE organizations as well.

*Pre-Visitation Surveys*

The Halifax Partnership is constantly on the lookout of ways to gather data in a less obstructive manner, especially as it relates to the Diagnostic Tool and initial visitation. Given that there are sections within the Diagnostic Tool that have very discrete, survey-like answers, it may be valuable to provide these questions in a different format. We are currently experimenting with ways to deliver these select questions prior to the initial interview as a pre-visitiation process. This workflow optimization, involves finding technical solutions to provide some of the more survey-like questions as an interview primer. The questions are delivered in an email format prior to the interview with the express quid-pro-quo of allowing the Account Executive to better prepare a more engaging diagnostic session. It ensures more information is gathered and that the client is provided with a better quality of service.

*Individualized Benchmarking*

Another technical solution that the Halifax Partnership is investigating is the ability to provide customized benchmarks to clients. This concept is linked to the Pre-Visitation Survey and would provide a company with an automatically generated report based on their answers. It would show their answers compared to an aggregated cross-section of their ‘peers,’ i.e. other companies who answered the survey. For example one of the questions might be whether or not the company had a dedicated HR personnel; the return report would show them what share of companies in their area also had a dedicated HR personnel. This would provide value to company and show a stark, immediate representation of how their company is operating relative to its competitors. The idea behind this concept is that very few activities drive a company to change faster than knowing where they stand relative to their peers. Further, the discreet nature of the response allows them to address these issues without worrying about a broader audience being aware of their concerns. Finally, it also gives the business client an idea of the sort of questions they might have for the Account Executive. If a particular issue struck home with them, they would be encouraged to contact and reach out to the interviewer in order to find remedies and solutions to address their business issue.

The BRE model is meant to be broad enough that individual programs can innovate and adapt to their unique circumstances. As operations progress, there will be more and more ways to improve the functionality and delivery of the BRE system as a whole. Once BRE participants have become familiar with the process and are comfortable with day-to-day operations, further experimentation, innovation, and the collaboration of these ideas should be highly encouraged.
15. Appendices

a. Common Acronyms

BRE (Concept) – Business Retention & Expansion
BREC (Accreditation) – Business Retention & Expansion Coordinator
BREI (Organization) – Business Retention & Expansion International
BREP (Accreditation) – Business Retention & Expansion Professional
DMA (Organization) – Nova Scotia Department of Municipal Affairs
IEDC (Organization) – International Economic Development Council
EDAC (Organization) – Economic Developers Association of Canada
NSBI (Organization) – Nova Scotia Business Inc.
EDO (Organization Category) – Economic Development Organization
ERDT (Organization) – Nova Scotia Department of Economic and Rural Development and Tourism
REN (Organization Category) – Regional Enterprise Network

b. Glossary of Terms

Action Team – See ‘Client Services Network.’ The term Action Team is specific to Nova Scotia; the term Client Services Network may be more familiar in the international BRE community.

Business Retention & Expansion – Broadly, this term is used to encapsulate an institution. It is the effort of communities to actively engage with local businesses and it encompasses a variety of different programs and activities. The institution holds that communities and businesses can work individually and directly with one another to improve economic and social outcomes. The term BRE is usually used to refer to a specific program involving direct business outreach and visitation, though it can encompass a much wider range of activities.

BRE Infrastructure – This is a set of agreements, whether formal or informal, that dictates how the Operations Team, Action Team, and Response Team support and interact with one another. It is the organizational collaboration necessary to operate a BRE program.

Client Services Network – This is the group of organizations and individuals, external to the BRE program, that provide services or offerings to business clients through referrals made by BRE staff.

Company Common Issue – This is a barrier to growth or business problem that affects a series of companies visited as part of BRE operations. These are generally defined by being systemic, or those which cannot be solved using BRE referral techniques. It is often contrasted with a ‘Company Specific Issue.’
Company Specific Issue – This is a barrier to growth or business problem that is specifically endemic to an individual company visited as part of BRE operations. These are generally defined by being capable of being solved using BRE referral techniques. It is often contrasted with a ‘Company Common Issue’.

Green Flag – This term is used to describe a ‘Red Flag’ scenario centered on a positive opportunity, rather than a negative one. Rather than the issue surrounding a possible business closure, it typically involves a possible large-scale expansion or increase in economic activity.

Management Team – This is a managerial, executive, and administrative group within the BRE program that ensures the program’s efficacy. Members of this team are generally defined by activities relating to relationship building between the BRE staff, Action Team, and external agencies/stakeholders.

Operations Team – This is a group of BRE staff who are tasked with performing company visitation and referrals. The team makes initial contact with businesses and coordinates which organization or groups should deal directly with these clients.

Red Flag – This term refers to a major issue, imminent threat, or significant barrier to business operations that is identified through BRE activities. It is generally connotes a crisis scenario where typical BRE activity is inappropriate and additional measures must be taken. Sometimes this term is used to refer to a response on the Diagnostic Survey that indicates a Red Flag event is likely.

Referral – This is a communication from the Operations Team to a member of the Action Team for the purposes of connecting them to a business client. Using this term implicitly connotes that a request has been made for a service or program to be provided to that client.

Response Team – This is a nebulous term used to encapsulate a group of individuals who are organized to respond to a Red Flag or crisis event. This term is also used more broadly to refer to groups of individuals who may be called upon to handle a crisis scenario rather than a specific team.

Retention Visit (sometimes Diagnostic Visit) – This is an activity where a member of the Operations Team meets with an external business client in order to diagnose the barriers faced by this company and gather information on its activities. This can be considered the primary unit of BRE activity.

Scope of Engagement – This term refers to the nature of a program’s interaction with its business clients. This would include such things as how many companies are met in a given session, how discussion and engagement occurs, and how long meetings typically last. For example, choosing whether to meet companies individually or in groups of two or three is a choice about the Scope of Engagement.

Spin-Off Programming – This refers to programs or initiatives that are created based on data or information gathered from the BRE visitation process.

Visitation – Broadly, this term refers to meetings and interactions between a member of the Operations Team and an external business. It can also be used more narrowly to mean the original Retention Visit which involves discussion and diagnosis of barriers faced by a business, as well as the gathering of information.
Appendix 1 – Organizational Diagram

Blue regions represent internal teams or processes (e.g. Operations Team, Management Team, Media Support). Green regions represent partners or cooperating agencies (e.g. Action Team, Response Team). Red regions represent external organizations (e.g. The Business, Stakeholders).

Appendix 2 – Data Control Framework

Provincial Level

Regional Level

- Halifax Partnership
- REN 1
- REN 2
- REN 3

Company Level

- Halifax Action Team
- REN 1 Action Team
- REN 2 Action Team
- REN 3 Action Team