

BPAP Distribution & Response: The questions were distributed to 47 BPAB members and 22 executed the survey for a 47% response rate.

Following are results of questions asked, and additional comments, if any.

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Best Practices Advisory Board

What recommendations would you offer to an EDO preparing for a prospect site visit?

Coordination:

- Establish a clear agenda with their coordinator, including start, finish, travel times, bathroom and email breaks; allow prospects "down-time" if they are staying overnight. Be flexible, anticipate last minute changes to their visit plans
- Get as much information on the Prospect as you can
- Determine exactly what the Prospect wants to get out of the visit, e.g. what to visit, who to meet with, questions to resolve
- Determine availability of key team members before trying to schedule, especially other business members
- Pre-qualify properties prior to planning visit; determine political feasibility of the Prospects use if regulatory approvals / variances are needed
- They may want to visit certain companies in your community, include in itinerary
- Inform security at any corporate campuses that you may be touring people in a van / bus / etc.

Available Information:

- Have all of the Prospect's requested information available in both print and digital format (packet for every Team member)
- Potential information to include: maps, plats, building plans, labor force, labor shed, wages, taxes, incentives, education, site, building, workforce, incentives, QOL
- Prepare a packet of information about the Prospect (if known) and make sure the ED Team knows it

ED Team:

- Establish your team and their roles / responsibilities based on needs of Prospect
- Designate a detailed note-taker, documenter
- Designate an "enforcer" for time management
- Send the prospect a list of your team, preferably with photo, title, contribution; collect a business card from every member of your team, insert in 8.5" x 11" plastic sheet, scan to them, have copies at meeting
- Have Prospect verify adequacy of your Team
- Establish ground rules for team members, get them to sign as "understood"

- Don't assume that your "locals" are as in tune with the goals of the visit, the need for confidentiality, how projects make decisions, the avoidance of negative selling, etc. as you, the professional, are. Effective communication in advance to all local parties and allies involved on basics of hosting a visit takes time but is worth it. Remember that often these visits are about elimination of candidate sites, more so than actually picking the right one.

Prospect Team:

- Try to get a list of their Team, titles, bios, roles, etc.
- Understand if they want to remain anonymous or not

Transportation / Logistics:

- Get a large enough vehicle(s), full of gas
- Get copy of key's to property gates if rep is unreliable
- Confirm all visits / meetings the day before.
- Carry cooler with water bottles, snacks
- Drive entire route days before visit

Entertainment:

- Determine any unique dietary needs / restrictions for any planned meals
- If dining together, meet with restaurant mgr and lay out what is needed, check, etc.
- Send them welcome snack / fruit basket to hotel

Site / Property:

- Know EVERYTHING about the site or have someone on board who does
- Make sure site is clean, neat, parking available and ready to be shown at least one day before visit
- Make sure property owner / broker know visit schedule and # of information packets to prepare
- For larger projects located in industrial business districts or central business districts, give City crews advanced notice so they can make sure the ROW and medians are clean of trash and freshly mowed

Presentation:

- Practice the presentation in advance with Team, who says what and when
- Make sure the Team knows the "mistakes made" list
- Respect CONFIDENTIALITY. Share what information can be shared with individuals who have the ability to approve or deny the potential business. Anticipate the best case and worst case scenarios for the Prospect and for "locals."

What recommendations would you offer to an EDO during a prospect site visit?

During Travel:

- Determine ahead of time who rides in what vehicle
- Have snacks and drinks available everywhere you go
- If they want to visit companies, take them to reception and introduce them to business reps, then wait in the car for them to finish visiting, don't make them ask you to leave

Prior to Arrival:

- Prepare name badges with titles
- Prepare "tent" name plates and set them on the table where you want everybody to sit
- Arrange Team in desired order for meeting them
- Dress appropriately, opt for business professional attire if undetermined
- Assume they know nothing about, nor care about the community AND will observe not only your strengths and opportunities, but your weaknesses and threats
- Make sure you listen carefully and ask questions so that your site visit meets their requirements. A site visit is to meet their needs; not yours. Remember, the Prospect is there to eliminate your city from consideration, not to learn how "great" you are.
- Determine questions you would like to get answered and who is going to ask them (e.g. relocation expectations)

During Presentation:

- Follow the agenda unless changed by Prospect
- Let them do the majority of the talking
- Demonstrate the ability to quickly involve regional partners (water, energy, gas, etc.) when needed
- Don't bad-mouth another community or state
- Declare specifically any notes or follow-ups for the documenter to memorialize
- Keep it light, personal, friendly, and not-too-intense
- Be honest. If you don't know something or can't do something, say so, and get back to them later.
- Stick to the facts, don't dominate the conversation or tour, don't sound desperate
- Try to learn more about "why" the company is making this decision; the real drivers behind the decision
- Cite examples of similar industries being successful in the region or similar sites being chosen in the past
- Wow them with pictures, visuals and easy to understand data such that leaves an impression and that they can easily remember

- Listen! Then answer truthfully and succinctly. Please honor confidentiality if it has been requested. Even if you have learned who they are, don't share it!
- Don't let local officials derail the conversation, stay on topic

At the Property:

- If the realtor or owner of the site isn't present at the visit, have them on cellphone standby in case a question is offered that you can't answer.

Closing / Departure:

- Don't overload them with gifts, written documents, etc. They are probably flying in / out of your area.
- Ask what to expect next, anticipated timeline?

What recommendations would you offer to an EDO after a prospect site visit?

- Prepare written summary of discussion, follow-ups to be taken
- Have an immediate debriefing with your team, document what went well and what didn't, write it down so you can benefit from it next time
- Send them requested info and answers to any questions raised asap
- Send them the hard copies of everything you talked about if they don't carry away your information packets
- If you cannot send asap, provide them with dates on when you anticipate providing any information promised during the visit
- Could send support letter from Team members or resolution from EDO in support of company
- Send a handwritten thank you note for the visit
- Thank them for visiting your community and offer to assist in any way you can. Ask for feedback.
- Ask for any timelines that need to be met
- Follow up, but don't harass, smother, annoy, circumvent appropriate channels, be overly enthusiastic
- Continue to check in with them periodically or as recommended by them. Be professional and highly attentive to any follow up questions or concerns that may arise
- Follow up through the appropriate channels only. Nobody likes someone who skips levels and asks premature questions. However when a follow up question appears, be clear, concise, accurate and timely with your response. Also let them know this is your organization's response (not your response) indicating alignment on your end.
- Send a thank you to your Team members and keep them informed periodically until a decision has been made

Can you offer examples of mistakes you have made regarding a prospect site visit?

- Didn't assign seating at the conference table and ended up with engineer across from their CEO
- Didn't set / emphasize ground rules for team
- Asking for business card when they wanted to remain confidential
- Team members bad-mouthing neighboring cities
- Did not include estimated times in agenda
- Overwhelmed them with gifts they can't carry on planes (wine, pocket knives, too bulky, etc.)
- Not teaching team members about the different culture of visitor
- Not prepared enough with company information
- Not enough visual materials for the site; renderings
- I had an elected official speak about confidential information and lost the project
- Had really nice big maps for meetings, but did not have travel-size available for the tour
- A cluster of trailer homes adjoined a prime industrial site, the prospect didn't have time to walk the site so just relied on visuals. Aerials made it appear this cluster of homes would be a problem in reality it wasn't. Needed to adequately prepare to address surrounding area and not just leave perceptions out there to linger.