

A Guide for Local Officials' Business Visits

It is widely reported that most new businesses and jobs are created by the economic activities of existing enterprises. For that reason alone it makes sense to be attentive to the needs and interests of a community's existing business base. These businesses are "customers" of those who lead counties, school districts, cities, villages and towns. Without those business and industry customers, the tax base, job market, philanthropic, and other contributions that make our communities viable would be in jeopardy.

How can you as a local elected or appointed official show appreciation to a local business and keep abreast of opportunities and concerns that the community could positively address? It starts with being familiar with local businesses. Walking around the downtown and attending business and industry events in the community is one of the best things a local official can do. On the more formal end of the spectrum, there is a rich set of resources available if you are interested in developing a Business Retention and Expansion (BR&E) program. BR&E programs tend to take considerably more effort to implement and sustain than informal visits.



This guide offers a complementary "middle-ground" approach that is less formal than a BR&E program, and more purposeful than very casual approaches. Drawing from model business visit initiatives, the following are some simple, important, guidelines to make your efforts worthwhile for both the community and business.

Outline a Visitation Program Schedule

- Develop a draft schedule that ensures you are getting around to a good cross-section of the community's businesses and can do so without it becoming an overwhelming time commitment—you'll have to prioritize.
- Plan time for pre-visit preparation and the post-visit follow up.
- Schedule appointments, confirm appointments, be prompt in keeping appointments, and follow through.

Identify the Purpose of the Visit

- There is a difference between just stopping by to say hello and a purposeful visit.
- There may be a business issue that the community could address.
- The community may have an issue with the business that you need to bring up.
- It may be that your purpose is to simply show appreciation or offer congratulations.



Establish a Team for Pre-Visit and Post-Visit Support

- With an informal visit program, it may be best to visit one-on-one, or at most, in pairs.
- Assemble the community's business and economic development partners—typically, the Chamber of Commerce, Economic Development Corporation, key municipal staff, and others who have insights about development issues—to assist in providing some insights and background about the business, to alert you to any potential issues, and to support you in addressing concerns or opportunities.
- This same confidential team of people who help to prepare for the visit will benefit from hearing about the results of the visit and can help with a response.

Prepare for the Visit in Advance

- Schedule the visit well in advance; then confirm the details prior to the visit.
- Know who will be present for the visit and what amount of time will be devoted to it.
- Do some basic "research" about the firm and the economic conditions facing it (web-based searches are a perfect place to start or visit the local library and work with their staff to learn more about the business).
- Find out about the business and the owner and employees (for example: What is the impact of the business in the community?; Are employees involved in the community?).
- Assemble your team for a pre-visit briefing—anticipate issues of importance to the firm and how the community and business can be mutually supported.

Conducting the Business Visit

- Unlike a formal BR&E program, there will not be a survey and sets of required questions—but that does not preclude having a set of critical questions and issues that could guide the conversation (see sidebar).
- It is important that you let the conversation take its proper course and that you ask probing questions as appropriate.
- It is important to show respect to and appreciation of the business during the course of the visit.
- The inquiry should not feel like an inquisition—it is not appropriate to ask for confidential information.
- Bring resource materials (directory of services, etc.) from the municipality and its partners and leave a business card that allows the business owner to contact you personally.
- Listen to the needs and interests of the business and take notes about what to follow up on.
- Make a note of everyone involved with the visit (asking for a business card or the correct spelling of a name is a good idea).
- Do not become defensive about a challenging issue or become overtly disagreeable even if the visit is not upbeat—acknowledge challenges as just that and agree to get back to the business once adequate research into the situation has been conducted.
- Resist the temptation to make bold commitments on the spot.
- Limit the visit to the time previously agreed to.
- Thank the business, acknowledge the interests of the business, and reiterate what commitments you have made and how they will be met.

Post-Visit Follow Up

- Send a note thanking the business for taking the time to meet with you.
- If you make a commitment to get back to a business about an issue, do it promptly and thoroughly.
- If you are referring an issue to another party, make it clear who is taking responsibility for what and by when—and check in later to see to it that it got handled.
- Consider “sharing” your positive experiences at an official meeting in a way that promotes and benefits the business.
- Look for ways to keep in touch with a call, a note, or an in-person opportunity (send along a clipping of a nice news story with a congratulatory note).
- If an issue has surfaced, make sure that the business is regularly updated on activities related to addressing it.
- If an issue arises that may impact the business, contact the business for input before the owner learns about in some other way.

Assess Your Efforts

- Ask your team and some of your visit “customers” for feedback.
- Reflect on what went well and what didn’t and make adjustments.



Having a Conversation with Your Businesses

The purpose of the visit is to listen to and develop a relationship with the business.

Tell me more about yourself and your business.

How has your business changed over the past (few) years?

What are some ways that our community is contributing positively to your business and your workers?

What are some ways that we can better support you and your employees?

Are there any specific business needs you have that I can try to get some assistance with?

You know we want to see you stay in our community and grow here—is there anything we can do to help make that happen?

Would you like to become more involved in the community, and if so, in what ways?

I want to make sure that I’m clear on what I will get back to you about—I heard you tell me ...

I’d like to keep in touch with you about issues of interest. What’s the best way for us to do that?

Would you have any concerns if I mentioned publicly that we’ve visited?

I appreciate the time we’ve spent getting to know one another—please don’t hesitate to be in touch.