

# Entrepreneur Visitation Protocol

TOOLS FOR ENERGIZING ENTREPRENEURSHIP

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*Don Macke, Co-Director  
Deb Markley, Co-Director*

## BACKGROUND AND INTRODUCTION

Our *Entrepreneur Visitation Protocol* provides a generic step by step process for conducting in person visitation with targeted entrepreneurs within a community setting. This process is adapted from the *Business Retention and Expansion Program* visitation process so it should be similar to those who have worked with this particular Program. However, our protocol focused on the entrepreneur, not necessarily the business. We are looking for folks who (1) fit our targeting and (2) are open to partnering with us through our development program.

### Proposed Protocol

The following protocol is proposed to guide the visitation for growth businesses. The elements of the protocol are as follows:

- Focus of the Development Effort.
- Process Steps.
- Confidentiality
- Desired Outcomes
- Visitation
- Communications
- Program Elements

**Focus.** The focus of this visitation tool is catalyst and break out entrepreneurial enterprises. Note - Refer to Attachment A — *Understanding Entrepreneurial Talent*.

**Process Steps.** We propose the following stepped process:

**Step 1 – Identification and Targeting.** The first step involves identification of target entrepreneurial businesses. We suggest the following considerations to guide targeted identification:

*Consideration 1 – Entrepreneurs.* *Entrepreneurs who fit the community's targeting.*

*Consideration 2 – Open to Assistance.* *The current owners/operators are open to participating in the assistance program to be offered by the community and its partners.*

**Step 2 – Visitation.** The second step is to visit each of the targeted businesses employing a modified *Business Retention and Expansion* interview process. Addressed in detail in a following section of this tool.

**Step 3 – Customized Assistance.** The third step involves engaging the entrepreneurs in a customized development program rooted in enterprise facilitation.

**Step 4 – Tracking.** A simple tracking system should be established to annually access each business initially identified with particular focus on those businesses enrolled in the program.

**Step 5 – Program Evolution.** Each year this economic development program should be critically assessed, determined if it should continue as a strategic part of the community's ED effort, and if continued, evolved to ensure its appropriateness and effectiveness.

**Confidentiality.** For this program to be successful it must be totally confidential. Any information gained through interaction with business owners must be kept discrete and restricted to a limited number of persons committed to confidentiality. Because of the need for confidentiality we recommend the following:

- *That the program be operated by a committee of no more than three to five persons from the development organization. These persons agree in writing to complete confidentiality of all information gained through this program.*
- *A written confidentiality pledge be provided to each business engaged formally or informally in the program. Any disclosure of information be made only with a written permission from the business. Identification of the person or persons recognized by the business to provide such a release should be obtained early in the process.*

**Desired Outcomes.** This activity should result in the following desired outcomes:

- Gain insight into the entrepreneur and their ventures and identify specific development issues that if addressed could enable the business to do better.
- Gain insight into the attitudes of the entrepreneur being involved in an economic development program focusing on targeted entrepreneurs.
- Gain insight on critical community specific development issues that might inform infrastructure needs for the community.

**Visitation.** We propose the following five areas to be probed during the visitation. The initial visitation should run between 30 and 50 minutes. A team of two should conduct the visitation with one person conducting the questioning and the second person taking notes on responses and asking clarifying questions.

- Inquiry Area 1 – About the Business.
- Inquiry Area 2 – About the Owners/Operators.
- Inquiry Area 3 – Future Plans.
- Inquiry Area 4 – Development Issues
- Inquiry Area 5 – Engagement Attitudes.

***Inquiry Area 1 – About the Business.*** First, we want to gain insight on the business or businesses (there may likely be more than one) owned and/or operated by the interviewee.

- Q1.1 Name of business: \_\_\_\_\_
- Q1.2 What year was this business started? \_\_\_\_\_
- Q1.3 What year did you became the owner of this business? \_\_\_\_\_
- Q1.4 Which best describes how you came to own this business?
- Started the business \_\_\_\_\_
- Purchased the business \_\_\_\_\_
- Inherited the business \_\_\_\_\_
- Q1.5 How is your business organized?
- Sole proprietorship \_\_\_\_\_
- Partnership \_\_\_\_\_
- Subchapter S corporation \_\_\_\_\_
- Corporation \_\_\_\_\_
- Q1.6 Which best describes your primary business activity?
- Service \_\_\_\_\_
- Retail (including restaurants) \_\_\_\_\_
- Finance/insurance/real estate \_\_\_\_\_
- Transportation \_\_\_\_\_
- Business and professional services \_\_\_\_\_
- Wholesale/distribution \_\_\_\_\_
- Manufacturing \_\_\_\_\_
- Construction \_\_\_\_\_
- Other \_\_\_\_\_
- Please describe briefly \_\_\_\_\_
- Q1.7 How many years of experience in this specific business activity do you have? \_\_\_\_
- Q1.8 In an average week, how many hours do you devote to your business? \_\_\_\_\_hours
- Q1.9 How many employees do you have? \_\_\_\_\_ Full-time\_\_\_\_\_ Part-time \_\_\_\_\_
- Q1.10 How many family members are employed in your business? \_\_\_\_\_
- Full-time \_\_\_\_\_ Part-time \_\_\_\_\_
- Q1.11 How many family members are investors in your business? \_\_\_\_\_
- Q1.12 What percent of the business do you own? \_\_\_\_\_%

***Inquiry Area 2 – About the Owners/Operators.*** The second area of inquiry focuses on the owners/operators.

- Q2.1 Name of owner: \_\_\_\_\_
- Q2.2 Address: \_\_\_\_\_
- Q2.3 Phone: \_\_\_\_\_
- Q2.3 Fax: \_\_\_\_\_
- Q2.3 Email: \_\_\_\_\_
- Q2.4 Website (if applicable) \_\_\_\_\_
- Q2.5 Sex: Male [ ] Female [ ]
- Q2.6 Marital status: \_\_\_\_\_

Single \_\_\_\_\_  
Married \_\_\_\_\_  
Separated \_\_\_\_\_  
Divorced \_\_\_\_\_

Q2.7 Number of children: \_\_\_\_\_

Q2.8 Highest level of education completed:

Eighth grade \_\_\_\_\_  
High school \_\_\_\_\_  
College \_\_\_\_\_  
Grad school \_\_\_\_\_

Q2.9 How many total years of personal business experience do you have? \_\_\_\_\_

Q2.10 Was either of your parents ever involved in owning and operating their own business?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, identify which parent and briefly describe the business activity.

\_\_\_\_\_  
\_\_\_\_\_

***Inquiry Area 3 – Future Plans.*** Thirdly, we want to gain insight on their personal/business plans.

*Note – The following questions are intended to be a menu to probe for insight. It is best to start with the following open ended question and then use the specific questions for probing and clarification.*

### ***Primary Question***

*What are your plans for your business(es) in the next five years?*

*Do you have longer-term business plans? If yes, what are they?*

### ***Probing Questions***

Q3.1 <b>Add a new product or service</b>	<b>1 2 3 4 5</b>
Q3.2 Sell to a new market	1 2 3 4 5
Q3.3 <b>Research new markets</b>	<b>1 2 3 4 5</b>
Q3.4 Expand distribution channels	1 2 3 4 5
Q3.5 <b>Expand advertising and promotion</b>	<b>1 2 3 4 5</b>
Q3.6 Invest in new equipment	1 2 3 4 5
Q3.7 <b>Replace current equipment</b>	<b>1 2 3 4 5</b>
Q3.8 Expand current facilities	1 2 3 4 5
Q3.9 <b>Redesign current facilities</b>	<b>1 2 3 4 5</b>
Q3.10 Seek additional financial capital	1 2 3 4 5
Q3.11 <b>Computerize current operations</b>	<b>1 2 3 4 5</b>
Q3.12 Upgrade computer systems	1 2 3 4 5
Q3.13 <b>Redesign operating methods</b>	<b>1 2 3 4 5</b>

Q3.14 Expand scope of operating activities	1 2 3 4 5
Q3.15 <b>Seek professional or technical advice</b>	<b>1 2 3 4 5</b>
Q3.16 Add specialized employees	1 2 3 4 5
Q3.17 <b>Invest in offsite training for employees</b>	<b>1 2 3 4 5</b>

***Inquiry Area 4 – Development Issues.** Every business faces real and perceived development issues. As humans, often these issues become person and clouded by emotions. It is important to discover those issues that are core to the development of the (1) entrepreneur and (2) their venture(s).*

***Primary Question***

*Please list and describe the five most important issues facing your business ability to be profitable and/or grow.*

***Probing Questions***

*Which of the following business development issues are critical to your business' success and future growth:*

*Rank on a 1 to 5 scale where one is very important and 5 is not important.*

- Q4.1 Access to financing or capital.
- Q4.2 Access to new markets.
- Q4.3 Assistance with business planning.
- Q4.4 Assistance with business transfer or sale.
- Q4.5 Lowering local taxes.
- Q4.6 Lowering state and/or federal taxes.
- Q4.7 Providing benefits to workers.
- Q4.8 Finding motivated and/or skilled workers.
- Q4.9 Lack of community awareness and support.
- Q4.10 Assistance in improving production.
- Q4.11 Access to higher quality telecommunications services.

***Inquiry Area 5 – Engagement Attitudes.** The final area focuses on the attitudes of the interviewee to become engaged in the community's economic development program.*

Q5.1 Our community ( ) is considering crating a program to provide customized develoment assistance to entrepreneurs like you - would you (and your team) be interested in learning more about such a program?

[ ] Yes [ ] No [ ] No Sure

Q5.2 What questions would you need to have answered before you could decide to become part of this program? [list]

*You have a successful business in this community – would you consider giving of your time and experience in any of the following ways:*

Are you willing to mentor other entrepreneurs? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, are you willing to mentor other entrepreneurs:

One on one \_\_\_\_\_

Through an entrepreneurs network that meets periodically \_\_\_\_\_

Through an entrepreneurs network on the Internet \_\_\_\_\_

Other \_\_\_\_\_

Please describe. \_\_\_\_\_

Do you think an entrepreneurial or vocational internship/apprentice program would be useful in helping people gain experience in starting their own businesses?

Yes \_\_\_\_\_ No \_\_\_\_\_

Would you be willing to participate in such an entrepreneurial apprentice program?

Yes \_\_\_\_\_ No \_\_\_\_\_

**Communications.** Two types of communication are required for this program:

**Type 1 – To the Business Owner(s).** Creating awareness of the program is important. Such awareness building should create appropriate expectations for the business owners that ensure their enlistment in the program.

**Type 2 – To the Community at Large.** Informal communication within a smaller community is quick and often inaccurate. It is important that the community be informed about the program to ensure its success. In Ord we recommend that the newspaper be enlisted to run a series of articles that introduce the program and provide progress reports monthly.

*Sample communications are contained in the Attachments.*

**Program Elements.** There are three elements to this *Assistance Program*:

**Element 1 – Identification, Visitation & Enrollment.** Addressed earlier in this tool. Regarding enrollment, we recommend consideration of a formal enrollment process involving the joint signing of a simple agreement that spells out the roles and responsibilities of both parties through this program. See the Attachments for a model agreement.

**Element 2 – Customized Assistance.** Employing enterprise facilitation, those entrepreneurs enrolled in the program would receive customized assistance that would help them resolve key issues enabling the business to grow. *See Outcomes for more information on possible development outcomes associated with this intervention.*

**Element 3 – Support Infrastructure.** A common set of issues will surface that are applicable to most transfer situations. The community should anticipate these issues and commit to building infrastructure to help resolve them.

## About the Center

The Center for Rural Entrepreneurship is a RUPRI or Rural Policy Research Institute national research and policy center with founding support from the Ewing Marion Kauffman Foundation of Kansas City, Missouri. Our mission is to *enable every rural resident to achieve his or her full entrepreneurial potential*. This mission will be achieved by collaborating with individuals and organizations engaged in the study, practice and policy of rural entrepreneurship. The Center supports research, field work, and policy development through collaborations with national, state and community interests. For more information on the **Center for Rural Entrepreneurship** contact Taina Radenslaben at 402-323-7336 or [taina@ruraleship.org](mailto:taina@ruraleship.org).

