

# Business Retention and Expansion Database

**Instructions:**

For each of the indicators below, please rate the company based on the information provided in the survey.

- 1= Indicator does not apply to this company
- 2= Indicator applies somewhat to this company
- 3= Indicator applies to this company
- 4= Survey answers closely reflect this indicator

**Type of Indicator:**

Growth = "5" is a positive indicator suggesting that company may be adding jobs. "1" indicates decline

Risk = "5" indicates that company requires follow-up to ensure that the indicator is not causing the company to close down or leave

Stable = "5" indicates that company is stable but not necessarily in a position to grow "1" indicates instability

Declining = "5" is a negative indicator suggesting that the company may have to close or move its plant in the near future. "1" is positive indicating stability and even growth potential.

Company Name:

Address:

City:

State:

ZIP:

Phone:

Fax:

Email:

Website:

Manager:

**Company Data**

Year

Date of Interview

	Indicator				Type of Indicator
1	Company has acquired another company				Growth
2	Last major equipment purchase for the facility was within the past 12 months				Growth
3	An equipment purchase is planned for the next twelve months				Growth
4	Annual budget for capital investment grows every year				Growth
5	Company has kept pace with initial sales projections				Growth
6	Sales are increasing				Growth
7	Total full-time employment is increasing				Growth
8	Company has introduced a new product or service within past 6 months				Growth
9	Company has a large and diverse customer base				Stable
10	Gross margin for product or service is increasing				Stable
11	Company operates an e-commerce website				Stable
12	Company utilizes email and website technology				Stable
13	Company has stable relationships with its vendors				Stable
14	Company has merged with another company				Risk

15	Company been acquired within the past 18 months				Risk
16	Company has excess capacity				Risk
17	Much of the equipment is idle				Risk
18	More than 50% of sales comes from one customer				Risk
19	Recruitment of quality employees is a problem				Risk
20	Company maintains plants in other locations that produce the same products				Risk
21	Company leases the land on which it operates				Risk
22	Equipment is old and in disrepair				Declining
23	Company is expanding its facilities in other communities				Declining

### Market and Industry Data

Indicator					Type of Indicator
1	Company is prepared for the new technology emerging in industry				Growth
2	Starting a similar business requires dealing with significant legal issues, high capital investment,				Growth
3	Overall size of industry is growing				Growth
4	Company has a clear understanding of its target market, demand by target market is increasing				Growth
5	Company has a substantial advantage over the competition (not including price)				Stable
6	Company has few competitors				Stable
7	There are few substitutes for the product or service provided by company				Stable
8	There are many suppliers of raw materials				Stable
9	Industry is insulated from changes in overall economic performance				Stable
10	The industry is consolidating with larger corporations buying up smaller companies				Risk
11	New products are being introduced in market to replace product provided by company				Declining
12	Competitors are moving plants overseas to take advantage of cheap labor				Declining
13	Government regulations are becoming more stringent for this industry				Declining

### Company Challenges Requiring BR&E Attention

1	_____
2	_____
3	_____