

COMPANY PROFILEKey: = Required, = Select Multiple, = Select One 1. Company name:

 2. Address:

City: State: Zip code:

Country:

 3. Mailing address:

Mailing city: Mailing state: Mailing zip code:

Country:

 4. County/City:

5. Township:

 6. Phone number:

7. Fax number:

8. Web address (URL):

 9. NAICS code:

10. Company notes:

VISIT INFORMATIONKey: = Required, = Select Multiple, = Select One 11. Date of meeting:

Format: mm/dd/yyyy 12. Visit number:

 13. Outreach Specialist:

14. Other meeting attendees:

15. Is the Outreach Specialist responsible for managing this company's record?
 Yes No

16. If No, please select the Customer Service Manager:

17. Contact visited:
 Title: _____

Salutation: _____

First name: _____ Last name: _____

Phone number: _____ Mobile number: _____

Fax number: _____

Email Address: _____ No email address

Prefers to communicate via:
 Phone Mobile Fax Email

18. How long did you spend on this visit?
_____ Hours
_____ Minutes

19. How long did it take to travel to this company?
_____ Hours
_____ Minutes

20. Did the company agree to a meeting?
 Yes No

21. Should this company be re-visited?
 Yes No

22. Revisit month and year:
_____ of _____

23. Visit Information Notes:

COMPANY INFORMATION

Key: = Select Multiple, = Select One

24. Description of products/services:

25. Who are your competitors?

26. Where are they located? What percentage is?

_____ % Local:
_____ % Regional:
_____ % State:
_____ % National:
_____ % Global:

27. What are the factors that make your company successful here?

28. Status of primary product/service:

Proprietary Commodity

29. Life cycle stage of firm's primary product/service:

Emerging Growing Maturing Declining

30. What is this company's legal status?

Sole proprietorship Partnership Corporation Limited liability corporation (LLC)
 Employee owned (ESOP) Non-profit Minority owned 51% Women Owned Veteran
Owned Other

31. If *Other*, please specify:

32. Location of company's headquarters:

In state Elsewhere in nation Outside USA

33. What year was this facility started?

34. Name of parent company, if different:

35. Functions located at this facility:

Distribution Engineering/RD Headquarters Manufacturing Services Warehousing
 Tourism Medical

36. Does this company have another U.S. location that provides a similar product/service as the local operation:

Yes No

37. Similar U.S. notes:

- 38. Does this company have another location elsewhere in the world that provides a similar product/service as the local operation:
 Yes No
- 39. Similar world notes:

- 40. Has the local facility changed owners in the past 5 years?
 Yes No
- 41. If Yes, describe the local impact of the change in ownership:
 Positive Neutral Negative
- 42. Is an ownership change pending for this facility?
 Yes No
- 43. Has the local facility changed management in the past 5 years?
 Yes No
- 44. If Yes, describe the local impact of the change in management:
 Positive Neutral Negative
- 45. Is there a formal succession plan?
 Yes No Not applicable
- 46. Does this firm have a current written business plan that has been updated in the past year?
 Yes No
- 47. Company information notes:

LOCAL WORKFORCE Key: = Select Multiple, = Select One

- 48. Total number of employees at this facility:
_____ Full-time employees
_____ Part-time employees
_____ Seasonal employees
_____ Contracted employees
- 49. Historical employment trend:
 Increasing Staying the same Declining
- 50. Projected number of employees at this facility:

- 51. Percent of workforce:
_____ % Skilled/Professional
_____ % Semi-skilled
_____ % Entry-level
- 52. Average hourly wage:
\$ _____ Skilled/Professional
\$ _____ Semi-skilled
\$ _____ Entry-level

53. What is your annual payroll, including fringe benefits?
\$ _____

54. Percent of workforce who live in:
 _____ % This county
 _____ % Elsewhere in state
 _____ % Another state

55. Describe the majority of personnel at this location:
 Young Middle age Near retirement

56. Do you have problems retaining employees?
 1 = Yes
 2 = No
 3 = Not Sure

Type of Employee	1	2	3
Unskilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Semi-skilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clerical:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional/Management:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

57. Employee retention notes:

58. Do you have problems recruiting employees?
 1 = Yes
 2 = No
 3 = Not Sure

Type of Employee	1	2	3
Unskilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Semi-skilled:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clerical:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional/Management:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

59. Employee recruitment notes:

60. Is there a formal workforce training program in place?
 Yes No

61. What percentage is:
 _____ % Internal Training:
 _____ % Michigan Works:
 _____ % M-Tech Centers:
 _____ % Community College:
 _____ % University:
 _____ % High School:

62. Union status:
 Yes No Not applicable

63. If Yes, what is the status of labor-management relations?

- Excellent Good Fair Poor

64. ISO certification:

- Yes No In process Not applicable

65. Workforce notes:

SALES Key: = Select Multiple, = Select One

66. Annual sales at this facility:

\$ _____ Annual sales private

67. What is the projected sales growth in the next year at this facility?

- Greater than or equal to 100% 50 - 99% 25 - 49% 10 - 24% 1 - 9% 0%
 Declining

68. Historical sales trend at this facility:

- Increasing Staying the same Declining

69. Historical sales trend at the parent company:

- Increasing Staying the same Declining Not applicable

70. Historical sales trend within the industry:

- Increasing Staying the same Declining

71. Sales trend notes:

72. Percent of total sales generated by top 3 customers:

- 76 - 100% 51 - 75% 26 - 50% 10 - 25% 1 - 9%

73. Do you engage in government procurement:

- Yes No

74. Please identify the source of your sales by percentage:

- _____ % Local (within 50 miles)
 _____ % Regional (51 - 250 miles)
 _____ % National
 _____ % International
 _____ % E-Commerce:

75. Please identify the source of your supplies by percentage:

- _____ % Local (within 50 miles)
 _____ % Regional (51 - 250 miles)
 _____ % National
 _____ % International

76. Please identify by customer type the percentage of your sales:

- _____ % Business:
 _____ % Government:
 _____ % Consumer:
 _____ % Other:

77. International trade status (as a percentage):

_____ % Importing:
 _____ % Exporting:

78. Historical export sales trend:

Increasing Staying the same Declining Not applicable

79. Sales notes:

E-COMMERCE

Key: = Select Multiple, = Select One

80. Use of Internet:

Email Website Market research Sell products/services Buy products/services
 Exchange data internally/externally Don't use

81. Type of Internet connection:

Dial-up/56k ISDN DSL Cable T1 T3 Wireless Don't know None

82. Do you have dedicated IT staff or vendor to handle your IT?

Yes No

83. What is the status of your investment in IT over the past 18 months?

Increasing Staying the same Declining

84. Condition of computers and other information technology equipment:

Excellent Good Fair Poor

85. E-Commerce notes:

FACILITY/EQUIPMENT

Key: = Select Multiple, = Select One

86. Status of facility:

Owned Leased

87. If *Leased*, expiration date:

Format: mm/dd/yyyy

88. Condition of facility:

Excellent Good Fair Poor

89. Condition of equipment:

Excellent Good Fair Poor

90. Describe the operations at this site:

One shift Two shifts 24 hours

91. How much of this facility's space are you currently using?

More than 90% 76 - 90% 51 - 75% Less than 50%

92. How much equipment capacity are you currently using?

More than 90% 76 - 90% 51 - 75% Less than 50%

93. Historical investment trends over past 18 months in the facility:
 Increasing Staying the same Declining
94. Historical investment trends over past 18 months in the equipment at this facility:
 Increasing Staying the same Declining
95. Is there room for expansion at this site?
 Yes No
96. Are you planning to expand locally in the next 12 - 18 months?
 Yes No
97. Facility/Equipment notes:

MUNICIPAL SERVICES

Key: = Select Multiple, = Select One

98. Please rate the following:

Use the following rating system:

- 1 = Excellent
 2 = Good
 3 = Fair
 4 = Poor
 5 = No opinion
 6 = Not applicable

	1	2	3	4	5	6
Public water/sewer:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Code enforcement:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building inspection/permitting:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Zoning/Land use:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local road network/condition:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interstate highway system/condition:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Airport:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utility (Gas):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utility (Electric):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Phone/Cell service:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet/Broadband service:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Police protection:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fire/emergency services:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public transportation:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

99. Municipal services notes:

BUSINESS CLIMATE

Key: = Select Multiple, = Select One

100. Please rate the following:

Use the following rating system:

- 1 = Excellent
- 2 = Good
- 3 = Fair
- 4 = Poor
- 5 = No opinion

	1	2	3	4	5
Workforce quality:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce availability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local government:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local tax structure:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State tax structure:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workers compensation rates:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economic development:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural/Recreational amenities:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K - 12 education:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colleges/Universities:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical training:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

101. Notes on business climate rankings:

102. Please rate the local business climate:

- Excellent Good Fair Poor

103. Please compare the local business climate today versus 5 years ago:

- Better today No change Worse today No opinion

104. Please forecast the condition of the local business climate 5 years from today:

- Will be better No change Will be worse No opinion

105. Please indicate this company's attitude toward this facility:

- Positive Neutral Negative

106. Please indicate this company's attitude toward this community:

- Positive Neutral Negative

107. Are you currently considering moving this establishment?

- Yes No Not sure

108. Why are you considering relocation?

- Changing market conditions Overcrowded building No land for expansion Transportation problems Crime/vandalism Low work productivity Environmental concerns Rigid code enforcement High local taxes High state taxes Lease expiration Other _____

109. Where are you considering relocating the establishment?

- Elsewhere in the county Elsewhere in MI Midwest (IN, OH, IL, WI, MO, IA, MN, ND, SD, NE, KS) Northeast (ME, VT, NH, MA, RI, CT, NJ, NY, PA) South (WV, VA, TN, NC, SC, GA, AL, MS, FL, AR, LA, OK, TX) West (WA, MT, WY, OR, ID, UT, CO, NM, CA, AZ, NV, HI) Abroad Undecided

110. Business climate notes:

ASSESSMENT

Key: = Select Multiple, = Select One

- 111. How would you rate this facility's overall health?
 Excellent Good Fair Poor
- 112. How would you rate the overall health of the parent company?
 Excellent Good Fair Poor Not applicable
- 113. How would you rate the local management's affinity to the community?
 Excellent Good Fair Poor
- 114. How would you rate the parent company's affinity to the community?
 Excellent Good Fair Poor Not applicable
- 115. How would you rate the risk of this facility closing in the next 1 - 3 years?
 Low Moderate High
- 116. How would you rate the risk of this facility downsizing in the next 1 - 3 years?
 Low Moderate High
- 117. Are there any local expansion plans in the next 12 - 18 months?
 Yes No

118. Assessment notes:
