

# Business Interview Guide 1

## Business Retention & Expansion Questionnaire

This main BR&E survey captures core data on the business aligns with an associated programmable excel input document provided by SEDA. The survey is composed of 5 sections and can be used partially or fully in conjunction with other assessment interview guides:

- Business Information
- Workforce
- Sales
- Facility
- Business Climate

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### BUSINESS INFORMATION

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1. Description of products/services:

- ⚙ Retail
- ⚙ Service Industry
- ⚙ Agriculture Primary
- ⚙ Agri-value
- ⚙ Manufacturing
- ⚙ Forestry
- ⚙ Technology
- ⚙ Oil & Gas
- ⚙ Minerals
- ⚙ Other. Please specify.

2. Who are your competitors (local, regional, national, international)?

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

- ⚙ Access to skilled labour
- ⚙ Access to markets
- ⚙ Quality of life
- ⚙ Regulatory environment
- ⚙ Transportation linkages
- ⚙ Access to suppliers
- ⚙ Access to warehousing
- ⚙ Access to suitable land
- ⚙ Access to buildings for lease or purchase



- ⚙ Cost effective utilities
  - ⚙ Other. Please specify.
4. Life cycle stage of firm's primary product/service. Emerging/Growing/Maturing/Declining
5. What is this company's ownership status? Privately owned/Publicly owned
6. What is this company's legal status?
- ⚙ Sole proprietorship
  - ⚙ Partnership
  - ⚙ Corporation
  - ⚙ Limited liability partnership (LLP)
  - ⚙ Non-profit
  - ⚙ Other, If Other, please specify
7. Location of company's headquarters
- In Province  Elsewhere in nation  Outside Canada \*\* Specify specific location.
8. Does your company have any foreign ownership or investment? Yes/No
9. Is attracting foreign investment a part of your growth strategy? Yes/No
10. How long has this facility operated
- <1 Year  1-4 Years  5-9 Years  10-19 Years  >20 Years
11. Is an ownership change pending for this facility? Yes/No
- If Yes, what is the anticipated time frame  1 year or less  2 years  3 years+
12. What is your age group (estimate by interviewer - do not ask)?
- a. Is there a formal succession plan?  Yes  No
- b. If Yes, how do you plan to exit the business?
- ⚙ Selling to family member
  - ⚙ Selling to co-owner
  - ⚙ Selling to employees
  - ⚙ Sale arranged to outside party
  - ⚙ Other. Please specify
- c. If No, why not?
- ⚙ Plan to advertise business for sale on open market
  - ⚙ Business no longer viable
  - ⚙ Plan to sell land/building only on open market
  - ⚙ Other. Please specify.



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## WORKFORCE

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1. Total number of employees at this location?
  - a. Total employees Full time peak / Part time peak
2. Historical employment trends    No response/Declining/ Staying the same /Increasing
3. Projected number of employees at this facility in three years
4. How did the number of staff change, if at all, in the last 3 years?    No response/Declining/  
Staying the same /Increasing
5. Is the number of unfilled positions?            Decreasing/Stable/ Increasing
6. Where does the company attract the majority of its workers from?  
 Locally  Provincially  Nationally  Internationally
7. Percent of workforce
  - Skilled/Professional
  - Semi-skilled
  - Entry-level
8. Have you experienced or do you anticipate any significant changes in the makeup of your workforce? Yes/No
  - a. If Yes, how did/will you deal with this change?
    - Focus on employee retention with benefits & lifestyle options
    - Hold job fair
    - Create internship/apprenticeship program
    - Start employee referral program
    - Other. Please specify.
9. Is the company experiencing recruitment problems with any employee positions or skills? Yes/No    If Yes, please specify
10. Does this business provide benefits to full-time workers? Yes/No
11. Does this business provide benefits to part-time workers? Yes/No
12. Is company investment in employee training?    None provided /Decreasing/Stable/ Increasing
13. Union status Yes/No
  - a. If Yes, what is the status of labor-management relations?  
 Poor  Fair  Good  Excellent
14. How would you rate the productivity in this facility? On scale of 1 to 7.



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## SALES

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1. Are your sales Declining/Stable/Increasing
2. Is the market share of the company's key products Declining/Stable/Increasing
3. Please identify the source of your sales by percentage
  - Local / Regional
  - Provincial
  - National
  - United States
  - International (other than the USA)
4. Please identify the source of your supplies by percentage
  - Local / Regional
  - Provincial
  - National
  - United States
  - International (other than the USA)
5. What is your International trade status?
  - Import
  - Export
  - None
  - a. If import/export, are they:
    - Increasing
    - Declining
    - Staying the same
6. Where are your international markets?

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## FACILITY

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1. Status of facility Owned/Leased
  - If Leased, what is the length of term remaining
  - <1 Year  1 - 2 Years  3 - 5 Years  > 5 Years
  - Are you planning on renewing current lease? Yes/No If No, why not
2. Facility condition of facility Poor/Fair/Good/Excellent



3. Condition of equipment    Poor/Fair/Good/Excellent
4. Historical investment trends in facility    Declining/Staying the same/Increasing
5. Does the company plan to expand in the next three years? Yes/No
  - a. If Yes, will it be in this community? Yes/No
  - b. Is your current site adequate for the proposed expansion? Yes/No
  - c. Estimated total investment
    - ⚙️ Approximate percentage equipment/technology
    - ⚙️ Approximate percentage real estate
  - d. Estimated facility size increase (sq/ft)
    - ⚙️ Office space
    - ⚙️ Research space
    - ⚙️ Enclosed Warehouse
    - ⚙️ Manufacturing/Production area
    - ⚙️ Loading/unloading areas
    - ⚙️ Outside storage
    - ⚙️ Unenclosed land
    - ⚙️ Other. Please specify.
  - e. Estimated timeframe for expansion     < 1 Year  1-3 Years  > 3 Years
6. What, if any, are the major constraints on your expansion?

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## BUSINESS CLIMATE

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1. Please rate the following     N/A  Poor  Fair  Good  Excellent
  - Access to highway/roadway
  - Access to markets
  - Access to suppliers
  - Availability of road transport services
  - Availability of rail transport
  - Availability of warehousing
  - Recycling
  - Inspections (eg licensing)
  - Development approval process
  - Telecommunications (tel, Internet, Cell)
  - Availability of buildings for lease or purchase
  - Availability of appropriately zoned land
  - Water and sewerage supply
  - Other (please specify)



2. Please rate the following  N/A  Poor  Fair  Good  Excellent

- Workforce quality
- Workforce availability
- Workforce stability
- Local government
- Local tax structure
- Province tax structure
- Workers compensation rates
- Economic development
- Cultural/Recreational amenities
- Housing
- K - 12 education
- Colleges/Universities
- Technical training
- Please rate the local business climate

3. What are the community's strengths as a place to do business?

4. What are the community's weaknesses as a place to do business?

5. Are there suppliers you think could locate in this region? Yes/No If Yes, list

6. Are there customers that we should attract to this region? Yes/No If Yes, list

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### OVERALL ASSESSMENT BY INTERVIEWER

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1. Rate the following Facility's overall health      Poor/Fair/Good/Excellent
2. Overall health of the parent company      Poor/Fair/Good/Excellent
3. Local management's attitude toward the community      Poor/Fair/Good/Excellent
4. Parent company's attitude towards the community      Poor/Fair/Good/Excellent
5. Rate the risk Facility closing in the next 1 - 3 years      Low/Moderate/High
6. Rate the risk Facility downsizing in the next 1 - 3 years      Low/Moderate/High
7. Are there any local expansion plans in the next 12 - 18 months?      Yes/No

