

# Site Visit Checklist

*This is a comprehensive Site Visit Checklist. Not all items may be relevant for your site visit.*

## I. Pre-Visit Preparation:

### *Understand the Company's Needs:*

- ☐ If you know, research the company thoroughly (industry, size, history, financial stability). Your project manager should be able to provide some initial feedback, such as the type of industry, product, and number of employees
- ☐ Identify their specific project needs (kind of space, square footage, acreage, utilities, workforce, transportation).
- ☐ Determine their key decision-making factors (cost, speed, quality of life, etc.).
- ☐ Obtain their project timeline and decision-making process.

### *Prepare the Site/Building Information:*

- ☐ Gather detailed information on available sites/buildings (size, zoning, ownership, etc.).
- ☐ Prepare site/building data sheets with photos, maps, and technical specifications.
- ☐ Verify utility availability and capacity (water, sewer, electricity, gas, telecom).
- ☐ Assess site accessibility (transportation infrastructure, proximity to highways, airports, etc.).
- ☐ If applicable, confirm the building or site is in optimal condition.
- ☐ Make sure the route to the site is clean and free of debris.
- ☐ Have a pre-determined location on the site where you will meet. A tent is always good for shade or rain.
- ☐ Always have bottles of water and a snack available.
- ☐ Prepare a map and directions to the site if other vehicles are involved.
- ☐ If your community doesn't have adequate resources, feel free to reach out to your utility partners or neighboring counties for help, but be sure to prioritize confidentiality.

### *Compile Community Information:*

- ☐ Gather data on the local labor market (availability, skills, wage rates).
- ☐ Prepare information on the local economy, major industries, and growth trends.
- ☐ Collect data on quality-of-life factors (housing, schools, healthcare, recreation, cost of living).
- ☐ Compile information on local government, taxes, and regulations.

### *Develop a Comprehensive Proposal:*

- ☐ Prepare a customized proposal or RFI that addresses the company's specific needs.
- ☐ Outline potential incentives (tax abatements, grants, workforce training programs).
- ☐ Present a clear and concise value proposition for the location.
- ☐ Include all relevant data and supporting documentation.

### *Coordinate Logistics:*

- ☐ Develop a detailed itinerary for the site visit, including times, locations, and attendees.

- ☐ Arrange transportation for the company representatives (airport pickup, ground transportation).
- ☐ Book accommodations for the visitors, if necessary.
- ☐ Schedule meetings with key stakeholders (local officials, utility providers, workforce development partners).
- ☐ Plan meals and any social events. Ask your project manager if there are any food allergies.
- ☐ Prepare name tags for all attendees.

*Prepare the Presentation:*

- ☐ Develop a compelling presentation that highlights the community's strengths and addresses the company's concerns.
- ☐ Use high-quality visuals, such as maps, charts, and photos.
- ☐ Practice the presentation and anticipate potential questions.
- ☐ Ensure all presentation materials are readily available (hard copies, digital files).

*Assemble a Team:*

- ☐ Identify key stakeholders to participate in the site visit.

*Brief the team on the company's needs and the visit agenda.*

- ☐ Assign roles and responsibilities to team members.
- ☐ Ensure the team is professional, knowledgeable, and enthusiastic.

*Confirm all details:*

- ☐ Confirm the date and time of the visit with the company or project manager(s).
- ☐ Confirm all reservations (transportation, accommodation, venues).
- ☐ Send a reminder of the itinerary to the company and all participants.

## **II. During the Site Visit:**

*Execute the Itinerary:*

- ☐ Follow the planned itinerary but be flexible and adaptable to changes, especially weather.
- ☐ Ensure smooth transitions between locations and meetings.
- ☐ Keep the visit on schedule.

*Facilitate Meetings:*

- ☐ Introduce all participants and facilitate introductions.
- ☐ Ensure all meetings are productive and focused.
- ☐ Provide clear and concise answers to the company's questions.
- ☐ Actively listen to the company's needs and concerns.

*Showcase the Community:*

- ☐ Highlight the community's assets and amenities.
- ☐ Provide opportunities for the company representatives to experience the local quality of life.
- ☐ Be prepared to address any negative perceptions.

*Present the Proposal:*

- ☐ Present the proposal clearly and persuasively.
- ☐ Emphasize the value proposition and the benefits of the location.
- ☐ Address any questions or concerns about the proposal.

*Gather Feedback:*

- ☐ Solicit feedback from the company representatives throughout the visit.
- ☐ Identify any remaining questions or concerns.
- ☐ Determine the company's next steps and timeline.

*Maintain Professionalism:*

- ☐ Be punctual, courteous, and respectful at all times.
- ☐ Dress professionally and appropriately.
- ☐ Be knowledgeable about the community and the proposal.
- ☐ Project a positive and enthusiastic attitude.

*Ensure Confidentiality:*

- ☐ Handle all information with the utmost confidentiality.
- ☐ Remind all participants of the importance of confidentiality.

### **III. Post-Visit Follow-Up:**

*Send a Thank-You Note:*

- ☐ Send a personalized thank-you note or email to the company representatives and/or project manager(s) within 24 hours.
- ☐ Reiterate the community's interest in the project.

*Provide Additional Information:*

- ☐ Promptly respond to any remaining questions or requests for information.
- ☐ Provide any additional data or documentation that was requested.
- ☐ Maintain Communication:
  - ☐ Stay in regular contact with the company representatives if they freely offer their contact information.
- ☐ Provide updates on any relevant developments in the community.
- ☐ Monitor the company's decision-making process.

*Debrief the Team:*

- ☐ Gather feedback from the team members involved in the site visit.
- ☐ Evaluate the success of the visit and identify areas for improvement.
- ☐ Document all feedback and lessons learned.

*Track the Project:*

- ☐ Maintain a detailed record of all communication and activities related to the project.
- ☐ Update project status in your tracking system.
- ☐ Continue to monitor and pursue the project until a final decision is made.