



*Proposal to serve:*

## **Bartlesville Development Corporation**

*With services of:*

## **Proactive Business Recruitment**

*Prepared by:*

Dean F. Whittaker  
May 5, 2010



Targeted Lead Development

Predictive Models

Industry Intelligence

1121 Ottawa Beach Rd., Ste 200

Holland, MI 49424

616.786.2500

[www.whittakerassociates.com](http://www.whittakerassociates.com)



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## How we can help?

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Whittaker Associates can assist the Bartlesville Development Corporation by engaging our 30 years of experience in target marketing research to create a database of high-quality companies that are viable candidates to locate, expand, or consolidate within the Bartlesville, Oklahoma area.

## What are we going to do?

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### *Development of Target Company Profile*

The first step in implementation is to determine “best prospect” companies. The answers to two questions help determine the feasibility and desirability of companies. These two questions are: 1) What companies will best fit the characteristics of the region and benefit from what the area has to offer, and 2) What companies will provide the benefits that the region is seeking including increased employment opportunities and expansion of the area’s tax bases?

The Whittaker Associates Team, working in conjunction with you, your staff, and community leaders, will develop a “best prospect” target company profile that describes the characteristics of the typical company most likely to benefit from the region’s resources and provide the benefits the community is seeking. The profile will be used to filter multiple company databases to identify those firms that match. Special emphasis will be placed on those companies with 50 to 250 employees in order to further diversify the area’s economic base and to focus on those firms often overlooked by competing economic development organizations.

### *Company Identification Process*

We will use a *predictive analytic process* in which we construct a weighted matrix of event variables to rank companies as to the probability of relocating or expanding. These variables include existing relationships within the region, changes in leadership, changes in ownership, new product announcements, significant new contracts, and other events which would impact their facility requirement. We will also factor in regional industry growth patterns and new and expanded announcements to determine those firms which are feasible to locate in your region and which will serve your economic development objectives.



### *Generation of Company Intelligence Reports*

The target company profile will be used to filter our proprietary WALTER database as well as other company demographic sources to compile a database of 360 target companies within 4 target industries. Each target company record will contain the company name, address, and a primary contact person and their email addresses when available. This database of companies is further enhanced by adding the product/service description, industry classification, and recent pertinent articles. An effort will be made to determine existing relationships between the Bartlesville area and these target companies working with Bartlesville community leaders and business retirees. A list containing 90 industry-specific firms will be delivered per month for a four-month period, starting September 1, 2010.

### *Company Qualification Process*

Subject to approval by the Bartlesville recruitment team, the target companies will be sent material introducing Bartlesville. A decision maker at each target company will be contacted by telephone to determine their level of interest in locating or expanding within the Bartlesville area. Firms will be qualified as Project (imminent), Prospect (has project, but no clear plans), Suspect (company is interested, but no project), or Work in Progress (being contacted). Up to four attempts will be made to reach the decision makers in each firm. We expect to reach at least 65% of the decision makers within the target companies over a two-week period of time. On-going contact with all firms on the list is strongly recommended.

### *Tracking System*

This database of target companies will be presented in our lead-tracking system, WALTER, for your review. You may choose to use this tracking system to process these leads, or you may download the database into an Excel format to import into your existing tracking software.

The benefit of using WALTER is that it provides a collaboration tool for us to work together as the companies are being researched, qualified, and followed-up with. WALTER is accessible anywhere that you have access to the Internet, and it creates a high level of transparency and accountability for those who have access to the password-protected database tool and the information that it contains.



### *City Comparison*

A spreadsheet will be created comparing the city of Bartlesville to the cities of the 360 target companies on several location factors. This spreadsheet will be compatible with mail merge for your convenience.

## **What do you get?**

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You will receive a qualified database of 360 target companies within four target industry sectors.

These target companies will fit a profile of firms that are both desirable to recruit by providing the benefits of wages and tax base that you seek, and that would benefit from the resources in your community. Each Company Intelligence Reports will be delivered to you in our web-based lead tracking system called WALTER. This tool gives you the ability to monitor the identification and qualification process and allows Whittaker Associates to monitor the results of the overall targeting effort.

You will also receive a city comparison spreadsheet evaluating side-by-side Bartlesville to the target companies' cities on several location factors.

## **When do you get it?**

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### *Time Table*

Create Target Company Profile: July 8

Identification of Target Companies/City Comparison: July 15 - Dec 1\*

Qualification of Target Companies: Sept 31 – Dec 31

\* Each list of 90 target companies will be delivered on the 1<sup>st</sup> of the month, beginning September 1, 2010 and ending December 1, 2010

## **What does it cost?**

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**The costs for the services provided by Whittaker Associates are as follows:**

Company Identification & Qualification (360 firms @ \$125/ea)...\$45,000\*

\*Includes a one-year subscription to WALTER (Sept 1, 2010 – Sept 1, 2011), our web-based business opportunity tracking system (\$100 per user per month, thereafter).



**Payment is due in the following manner:**

\$15,000 .....	due upon engagement
\$6,000 .....	due August 1, 2010
\$6,000 .....	due September 1, 2010
\$6,000 .....	due October 1, 2010
\$6,000 .....	due November 1, 2010
\$6,000 .....	due December 1, 2010

Total Cost: \$45,000

**What are the terms and conditions?**

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The use of the target company data is licensed to the Bartlesville Development Corporation for their use in marketing their region and is not be re-sold or distributed to others without written permission from Whittaker Associates, Inc.

**Who is going to do it?**

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**Dean Whittaker, President/CEO** and founder of Whittaker Associates, Inc., served as the Managing Director of the Illinois Office of Industrial Development as well as the Director of the Center for Entrepreneurial Resources and Applied Research at Ball State University prior to forming Whittaker Associates, Inc. in 1987.

A frequent lecturer, teacher, and author on the use of information technology in economic development and industrial real estate, Mr. Whittaker is a Certified Economic Developer by the International Economic Development Council. His academic credentials are from Illinois State University and the University of Illinois.

**Vidhan Rana, Research Analyst**, Vidhan's primary responsibilities include gathering and analyzing data on targeted companies to anticipate corporate actions, and using predictive analytical techniques to improve the lead qualification process used by the company. Vidhan plays a key role in the development of Whittaker's primary online lead tracking and management tool, the WALTER System, and has taken the lead in creating a database of



companies from emerging markets currently or potentially looking to expand in North America.

Originally from Kathmandu, Nepal, Vidhan is a Summa Cum Laude graduate of Hope College, with degrees in economics and management.

**Jami Miedema, Research Analyst**, as a research analyst Jami's responsibilities include gathering and examining information related to economic development, industry trends, and growth patterns. Jami also maintains the company financials.

In her position here at Whittaker Associates, Jami has conducted research on over 45 projects. Her biggest assignment to date was for the Tennessee Department of Economic and Community Development, which entailed research on over 1000 companies. Jami came to Whittaker Associates with several years of experience in customer service and management.

Jami received her bachelor's degree in finance from Grand Valley State University. She is an active volunteer with Habitat for Humanity and in her community.

## What do they say about us?

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Our reputation as a company and as individuals within the company is very important to us. We take pride in what our clients have to say about us and our work. Here are a few clients within your area that have offered to share their opinions about us.

Dublin-Laurens Georgia Economic Development Authority





## Shreveport, Louisiana

**W. Kurt Foreman**  
Northwest Louisiana Economic Develop...  
Senior Vice President

(318) 677-2512 Work  
kurt@nledf.org  
400 Edwards Street  
Shreveport, LA 71101  
www.nledf.org

## Longview, Texas

**Susan Mazarakes**  
Longview Economic Development Corp...  
Executive Director (Acting)

(903) 753-7878 Work  
(800) 952-2613 Work  
Mobile  
susan@longviewusa.com  
410 North Center Street  
Longview, TX 75601  
<http://www.longviewedc.com>

## How do you engage us?

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To engage the services of Whittaker Associates, Inc. as outlined in this proposal, please sign the Letter of Agreement below and return it along with your retainer payment (\$15,000). We are prepared to begin work on your project immediately.



## Letter of Agreement

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**Bartlesville Development Corporation  
Proactive Business Opportunity Development**

Total Project Cost: \$45,000

Agreed to and accepted on the \_\_\_\_\_ day of \_\_\_\_\_, 2010.

By: \_\_\_\_\_

Title: \_\_\_\_\_

Whittaker Associates, Inc.

A handwritten signature in black ink that reads "Sean F. Whittaker".

President/CEO

Date: May 5, 2010

**The offer of services is valid for thirty (30) days starting 5/5/10**  
Any disputes arising will be resolved through a mediation service.