

Appendix 2: Community Investment Inquiry Sheet

COMPANY INFORMATION	
Company name:	
Address:	
Mailing address (if different):	
Telephone number:	
Cellular Number:	
Fax number:	
Web address:	
Email addresses:	
NAICS Code:	
INITIAL CONTACT INFORMATION	
1. Date of initial contact:	
2. Initial contact made via:	
	<input type="checkbox"/> Business Meeting
	<input type="checkbox"/> Email/Website
	<input type="checkbox"/> Phone
	<input type="checkbox"/> Regular Mail
	<input type="checkbox"/> Social Meeting
	<input type="checkbox"/> Trade Show
	<input type="checkbox"/> Other _____
3. Initial contact made by:	
	<input type="checkbox"/> Corporate official
	<input type="checkbox"/> Real estate developer
	<input type="checkbox"/> Site selector
	<input type="checkbox"/> Provincial office
	<input type="checkbox"/> Other community,
	<input type="checkbox"/> Workforce agency
	<input type="checkbox"/> Other (Please specify) _____

4. Contact	
Contact Type:	
Title:	Salutation:
First Name:	Last Name:
Corporate Name (if different than company):	
Address:	
Telephone number:	
Cellular Number:	
Fax number:	
Email addresses:	
Notes: _____ _____	
5. Action taken from initial contact:	
<input type="checkbox"/> Information emailed <input type="checkbox"/> information mailed <input type="checkbox"/> Phone conversation held <input type="checkbox"/> Meeting scheduled <input type="checkbox"/> Referral made to another agency	
6. Initial contact notes: _____ _____	
7. Follow-up date: _____	
8. Follow-up notes: _____ _____	
PROJECT INFORMATION	
9. Project name:	

<p>10. Timetable:</p> <p><input type="checkbox"/> To be determined</p> <p><input type="checkbox"/> Immediately</p> <p><input type="checkbox"/> 6 - 12 months</p> <p><input type="checkbox"/> 12 - 24 months</p> <p><input type="checkbox"/> Beyond 24 months</p>	
<p>11. Reason why local market area is being considered for this project: _____</p> <p>_____</p> <p>_____</p>	
<p>12. Total sales for prospect:</p>	<p>\$ _____</p>
<p>13. Total number of employees</p>	<p>_____</p>
<p>14. Estimated Jobs</p> <p>_____ Low Range</p> <p>_____ High Range</p> <p>_____ Projected</p>	
<p>15. Number of Jobs by type:</p> <p>_____ Skilled/Professional/Technical</p> <p>_____ Semi-skilled</p> <p>_____ Entry Level</p> <p>_____ Total</p>	
<p>16. Other locations being considered:</p>	<p>City _____ Province _____</p> <p>City _____ Province _____</p> <p>City _____ Province _____</p>

17. Type of project:

- Agriculture
- BIO
- Commercial
- Distribution/Warehouse
- Government
- Headquarters
- Healthcare/Medical Information Technology
- Land Development Manufacturing
- Other
- Office
- Research and Development
- Retail
- Other _____

18. Location requirements:

- Downtown
- Suburban
- Rural
- Near college / university
- Near highway
- Near airport
- Near rail access
- Broadband access
- Other _____

19. Location requirement notes:

20. Type of Project (Building and Land):

- Lease
- Purchase existing
- Purchase land

21. Project Specs (Building size)

Square Footage _____ to _____

22. Project Specs (Land size)	Acres needed _____ to _____
23. High ceilings <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, what is the required ceiling height (ft) _____
24. Loading Docks <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many _____
25. High capacity floor loads <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how this is the required concrete (inches) _____
26. High capacity/special electrical	If yes, what is the required electrical load? _____
Project requirement notes: _____	
INTERNAL USE ONLY	
27. Date:	
28. Rate status of prospect: <input type="checkbox"/> Inquiry / Information only <input type="checkbox"/> Active - detailed discussion <input type="checkbox"/> Active - short list <input type="checkbox"/> Active - ongoing discussion <input type="checkbox"/> Won <input type="checkbox"/> Lost	
29. Rate potential for winning: <input type="checkbox"/> High <input type="checkbox"/> Moderate <input type="checkbox"/> Low	
30. Status/Potential notes: _____ _____	