Synchronist Business Information System®

x-Tool How-To # 8

Synchronist Cluster Scenario Analysis

"Data mining" is easily accomplished with e-Synchronist x-Tool. The following sample x-Tool analysis techniques can be used to identify specific groups of companies with shared characteristics within a specific scenario. Some have potential to be tapped while others have problems that can be addressed for and/or by the group.

These are only examples. They can be modified with the addition of any other piece of interview data or with company criteria to further refine the group of companies identified. The general format is:

> Topical issues or parameters
> Company parameters
>
> Company parameters frequently used include:
> > Geographic location (within a region)
> > NAICS / Industry
> > Employment size
> > Local vs. branch presence
> > Number of patents
> > Where R&D takes place (in-state/region or outside)

If you identify a filter you find useful, please send them along with a note describing your use so we can check them out for use by other Synchronist Users. Eric, ecanada@blanecanada.com

Screens for Useful for Partners and Clients

Manufacturing Extension Program (MEP)
> Product Life Cycle - maturing and emerging
> New product introductions
> > ▪ None recent past
> > ▪ None planned
> Sales stable or declining
> Technology change

Synchronist x-Tool Use

First, save the x-Tool spread sheet to your desktop. Follow the instructions on the instructions tab. Then close the server version of Excel on the screen and Exit Synchronist. Open the saved x-Tool on your computer.

To use x-Tool Screening techniques, the filter pull-downs must be visible on the data worksheet. If the filter pull-down is not visible at the top of each column on the data sheet, go to the text menu, click on Data, scroll down to filter and click on the Auto filter option.

When a column filter has been set, the pull-down arrow for that column will turn blue as a reminder.

The form should be set to manually recalculate. (Tools, Options, Calculate, Manual) Once you have set your column filters, use the F9 function key to force a recalculation and graphing. Recalculation progress will show in the lower left corner of the x-Tool.

Trick: When you set a filter, use the Color/Fill tool from the Excel tool bar to highlight the column that has been changed. This will make it easy to reset the filtered columns.

MEP and Workforce (need help)
Technology change
Workforce stability
Workforce training budget increasing
Workforce skill gaps
Unfilled positions increasing

Workforce (growth oriented)
R&D (new product development)
New products introduced
New product planned
Technology change
Workforce growing
Workforce training budget increasing
Workforce skill gaps
Unfilled positions increasing

Expansion
Room to expand
Lease
Plans to expand
Ownership change
Growth barriers
Growth potential
Trouble with HQ

Entrepreneurship and Innovation Center
R&D investment level
R&D focus (new product, production, product improvement)
Product life cycle status (mature, stable, emerging, declining)
New products planned
New skill training level
Technology orientation (every company is somewhere between a producer of technology to those who resist technology)
Growth potential
How management grows the business (fast adapter is very different than a leader/innovator)
% or # of technical workers (management, scientist, engineers)

Export Service
Product Life Cycle
Company's primary market
Total company sales
Export sales as a percentage of total sales
Production facilities outside the country

Real Estate Needs
No room to expand
Plans to expand
New products introduced
New products planned

Leased Facility Screen
 Lease facilities (yes)
 Number of employees
 Lease expiration date
 Business sector
 Facility type

Business Development Incentives Targets

 For the State Department of Development and the Governors office it is a very BIG point when they can help a company via tax credits because they have can have a direct impact on growth (i.e. they don't offer workforce development or tech assistance solutions etc). The following identifies some of the relevant screens to identify companies that potentially qualify for these incentives. Additional detail can be added to screen for qualification criteria such as the number of employees, geographic location, etc.

Job Tax Credits
 Companies with Plans to Expand
  Facility type (manufacturing, telecommunications, etc.)
 Companies with Growth Potential (<60 percentile)
Investment Tax Credits
 Companies with Plans to Expand
  Facility type (manufacturing, telecommunications, etc.)
  In community since (<3 years)
  Capital investment (<$50,000)
 Companies with Growth Potential (<60 percentile)
Optional Investment Tax Credits
 Companies with Plans to Expand
  In community since (<3 years)
  Capital investment (<$50,000)
 Companies with Growth Potential (<60 percentile)
Headquarters Tax Credit (attraction project)
Research & Development Tax Credit
 Facility type (manufacturing, telecommunications, etc.)
 R&D investment
 R&D on-site or in state
Retraining Tax Credit
 Training
 Training Increasing
 New skill training
Child Care Tax Credit
 Child care concerns (public service >3)
Small Business [fast growth] Tax Credits
 Companies with fewer than x employees

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