



**Global Direct Investment Solutions**

*Corporate Development for a Networked World*

P.O. Box 439, Fox River Grove, IL 60021-0439  
TEL 847-304-4655 FAX 847-304-5375

**Base Agreement : GUIDE Area Profile**

We would like to participate in the GUIDE Area Profile service. We will send an e-mail with suggested content to publish a Profile on your website, consistent with the available examples and template. We will also send additional promotional materials for reference, and then schedule a meeting to share further knowledge of our area through an initial interview and a plan for periodic updates throughout the year.

The standard service description and terms of business form the basis of our agreement and are incorporated by reference as published on the website for all participants as a shared service:

- 1) The Standard GUIDE Area Profile Service Description
- 2) The Standard Terms of Engagement to Provide GUIDE Area Profile or SICR Services

Additional background is found on the [www.gdi-solutions.com](http://www.gdi-solutions.com) website in the "Services" section.

Optional services such as SICR (to participate in the proactive marketing and corporate relationship development work to develop well-qualified project referrals), familiarization visits, or other GUIDE services may be added to this Base Agreement by a simple amendment memo referencing the standard service descriptions as published, and confirming any variances from the standard scope and budget.

At this time we agree to the GUIDE Area Profile service for :

- \_\_\_ one year, at a 10% discounted fee of \$6750 for payment in full at this time
- \_\_\_ one year at \$7500, paid as \$2000 initially plus \$500 monthly, or as \$3000 plus \$1500 quarterly
- \_\_\_ three years at \$6000 per year, paid as \$500 per month or as \$1500 quarterly

Agreed,  
for Global Direct Investment Solutions, Inc.

Agreed,  
for \_\_\_\_\_  
*Participating organization*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

Bruce E. Donnelly, President

\_\_\_\_\_  
*Name and title*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*

*Please fax this agreement to Global Direct Investment Solutions at 847-304-5375 and then mail the signed originals (one for GDI Solutions' records plus one or more to sign and return for the records of the participant) along with the initial payment to the address above. Periodic payments can be arranged by automatic or electronic funds transfers for convenience. Contact us for details of such arrangements.*



## **Standard GUIDE Area Profile Service Description**

For general background, refer to the Services section of our website at [www.gdi-solutions.com](http://www.gdi-solutions.com). Our Standard Terms of Engagement apply to this annual service.

### **Objective:**

The GUIDE Area Profile is an annual service designed to support development of a closer working relationship between the designated relationship leader at Global Direct Investment Solutions and at the participating organization. The relationship leader is also responsible for our work among corporate executives to identify and support major direct investment projects in target regions and industry sectors.

One aspect of this relationship is to make basic knowledge about the area readily available through our website in the form of a GUIDE Area Profile page, several other GUIDE services, and related links or maps as demonstrated through examples on our website. As an executive summary presentation, however, this website content is expected to be more limited in scope than the knowledge about the area which our relationship leader should develop through initial work together and periodic follow-up contacts to remain aware of recent developments. It should highlight key points of expected interest.

### **Scope of work:**

The focus of Area Profile work isn't to gather and present statistical data, but rather to share local market knowledge, contacts, and various information sources which can help our relationship leader, corporate executives, or professional advisors to quickly recognize what differentiates the area from others, and when it may be a viable "long list" candidate worthy of closer examination and analysis for a project. The GUIDE services document what is available in a consistent, comparable way. They combine to form a response-oriented process to address investor enquiries on common topics of interest. They organize "on the shelf" knowledge and contacts for quick and easy reference, both by any visitors to our website and for our own use to highlight what differentiates an area for potential investors and their advisors.

The information required for the website presentation is provided by the participating organization, and is edited to maintain consistency with similar reports for other areas. This is expected to require several days of work initially plus periodic updates for significant new developments or to refine the presentation.

The scope of GUIDE Area Profile work does not, however, include support of the SICR marketing, corporate relationship development, professional networking, and other activities of Global Direct Investment Solutions to reach and arouse interest among executives.

Our SICR service is the work to proactively take such local knowledge to market, develop top corporate relationships, and do all the marketing work to consistently find many project leads, as opposed to just responding to enquiries. As an independent service, Global Direct Investment Solutions is not offering an exclusive "lead generation", "appointment setting", or "targeting" and "research" to push the promotional interests of one area. Instead, our role is to develop working relationships and share local area knowledge which can produce relevant introductions at any time, whether in response to enquiries from investors and advisors, or through our more proactive marketing work. This is analogous to the role of a retailer who attracts many clients with related but different buying interests to create an efficient distribution channel for many products, as opposed to trying to sell individual products "door to door" on any given day.



## Time Constraints for the Work Plan

Given the limited scope of work foreseen for the GUIDE Area Profile, which is intended to keep the budget down so that more areas may participate and provide useful knowledge for convenient reference by executives, there are limits on how much time can be invested during the year on work with any single area. We can do additional work as may be agreed individually, but that is beyond the scope of this standardized service.

After all, the main focus of our work is intended to be on services such as SICR, to proactively find and introduce executives who welcome project support to the people with the knowledge and capabilities to help them. If we spend too much time with representatives of any one area, it is unfair to the other participants who support the same services at the same price, and reduces our ability to deliver higher value more efficiently for the benefit of all participants.

As a shared service, minor variances are expected. Some areas will have more information available than others, and some presentations will require more effort than others to synthesize such local knowledge into a persuasive summary, but the budget level for all areas is based upon an assumption of roughly 40 hours of professional work per year on average for GUIDE Area Profile work with any participating area. A few will require more, and a few will require less.

If significant work on behalf of one area is agreed to be necessary in excess of that standard level, then it would be approved separately within the scope of the overall Base Agreement for our working relationship, typically on a time and expense basis, whether as a verbal commitment or a formal amendment memo (additional scope and fee proposed and confirmed in writing, such as by e-mail).

## Familiarization Visits to the Area

Like site selection consultants, we receive many invitations for familiarization visits to areas which are interested in our capabilities to reach potential investors. The GUIDE Area Profile service provides a better solution. Instead of investing through an expensive program of familiarization visits to share knowledge with only a handful of professionals who may be potential “influencers” for future projects if they remember and share such knowledge with investors at that time, the GUIDE Area Profile work makes local knowledge openly available to all executives and their advisors already on a 7x24 basis to complement what we share personally with our own contacts after any such familiarization programs.

Of course, there is high value in getting to know an area more directly through personal visits, including meetings with existing investors and with the people who are likely to be supporting potential investors or their advisors when they investigate the area. It is very useful, but there are thousands of places and only so many work days in the year. Such trips take considerable time away from other marketing activities, including our time to travel there and back as well as all the preparatory work by the hosts, so they are very costly in terms of professional time beyond any payment for the direct travel expenses involved.

Some areas regard familiarization visits as a good investment, while others do not regard them as a good use of resources, especially when funds are limited and there is no real assurance that the visitor is likely to serve an actual potential investor in the area soon. From our perspective, they are optional rather than a necessary part of this service.



A familiarization visit may be more appropriate when a specific project is being supported, such as to help a potential investor gather more knowledge about the area, even if not yet at the stage of a more detailed search with the help of a professional advisor to compare alternatives. For example, we may meet an investor with potential interest in an area on the basis of our general background knowledge, but a visit may help to differentiate whether it is really a good “match” with the area, and perhaps provide better anecdotal evidence to encourage the investor to visit.

In any case, familiarization visits are beyond the standard scope of the GUIDE Area Profile work because some areas may want to do them and feel the additional expense involved is justifiable, while other areas may not be in a position to afford them, or may feel that such an expense is not appropriate, especially in the absence of a specific project of potential interest. Besides, the cost of such visits varies widely, particularly because of the travel and time involved. We therefore have excluded such work from the GUIDE Area Profile work plan (and budgeted hours), and have not budgeted travel time and expenses into this service. It is assumed that all meetings with the participating area representatives will either be at our place of business, or at events where we can meet privately, or simply take advantage of our travel for other purposes. For example, if we are visiting the area on other business, we can take advantage of the trip to meet efficiently.

We therefore propose any such familiarization visits on an individual basis through an informal or formal amendment memo to the Base Agreement to cover the time and expenses involved as may be negotiated at the time. Since travel to and from an area can consume more professional time than the actual relevant meetings in the area, we plan such trips very selectively.

By the nature of the GUIDE Area Profile relationship, however, we gradually build up greater knowledge of an area by working together over time, and share it openly, so there should be greater value in such visits than has been common in the past through other approaches. With the basic relationship and knowledge-sharing process already in place, we can take advantage of efficient opportunities for such visits, such as when we are in the area already on other business.

As this business develops, the “one stop shop” nature of our relationship leader also plays an important role in this regard. We intend to have such leaders in regional centers, closer to the areas which participate in this service, so that it becomes easier to meet on short notice with less travel time and expense. This should also help the relationship leader to develop better local area knowledge than is possible when covering widely scattered locations. No matter where in the world a project enquiry originates, the relationship leader handling the corporate relationship will consult the regional relationship leader for local knowledge about investment alternatives. This should create a far more efficient process to share valuable knowledge derived from local visits.



## **Deliverables**

The “deliverables” of the annual GUIDE Area Profile work are as follows :

- 1) The standard website presentation and links of the GUIDE Area Profile empower executives and their advisors anywhere to easily find such local knowledge, linked resources, and key contacts.

We can offer no assurance, of course, about how many investors will make use of such market information, but we intend to actively promote our website and business for this purpose. The Area Profile is the first tool we use to support our research and referral work for companies.

- 2) We designate a specific relationship leader in our company who will be responsible not only for the preparation and maintenance of the Area Profile on the website, but also for additional knowledge to support any enquiries which may be relevant to the area. This creates a sort of independent “hot line” or “one stop shop” capability for an entire region, regardless of political boundaries, local agendas, and competition among areas.

For example, a relationship leader for the northeast US or southeast US region can work with multiple local areas in those regions, even if they compete directly or have an overlapping scope of responsibility, just as we work with multiple professional services.

There may be a state agency, a utility, a city, and a county which all have capabilities related to a particular area. Each can be a separate GUIDE Area Profile relationship to develop a better understanding of their respective capabilities and scope, or they may all agree to collaborate with a designated lead contact among themselves as one Area Profile participant. Either way, the role of our relationship leader is to know the participating organization well and understand what it can deliver for investors, so the scope of work differs according to the participant. Participation by a state agency develops knowledge about what can be done at the state level to support investors – not details about every local area within the entire state.

- 3) We develop and maintain more detailed information about participating areas than is published through the website. This is for our private internal reference when handling investor enquiries, but it is still a deliverable of this work by providing a foundation for better support to investors than is otherwise possible. There are thousands of areas of potential interest to investors, so the investment in the performance of this work helps to create one part of that required base of knowledge – for the participating area.
- 4) As explained in the section on familiarization visits, although we do not include the time and expense of such trips in the basic scope of the GUIDE Area Profile work, the existence of an established working relationship makes it easier to arrange more efficient and productive visits to the area, such as when we are in the area on other business already. Since we have a process in place to openly share such local market knowledge, rather than simply keep it to ourselves, and know more about the area in advance, the value of such visits should be higher to participants.
- 5) We also expect to share non-confidential market knowledge with participants, such as our own analysis of market trends from our corporate relationship and networking activities. This would not include company-specific research except as background for relevant referrals, such as to summarize what a potential investor has authorized us to share when making an introduction.