**COMPANY**

**Export Trade Plan**

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# EXECUTIVE SUMMARY

This section is typically written last & is no longer than three pages. This is designed particularly for a funding opportunity to showcase the characteristics, capabilities, & experiences of the company & management team; the nature & degree of innovativeness of the product or service & its market size & competitive advantage; & the expected results in terms of sales & profits over the next 3 years. If a reader only reads your executive summary, they will be able to understand why your business is pursuing an international market & what your competitive advantage in that market is. You may also wish to highlight how this trade plan will further your business’ overall business plan or strategy.

# INTRODUCTION

Bring the reader along to understand the type of business & description of the major products/services involved. Introduce why the business is ready to explore global market opportunities, describe the ability to meet the capacity of increased demand, & demonstrate all levels of management commitment to a long-term global business strategy. Provide a description of the country proposed for market entry if exporting or sourcing if importing, the rationale for selecting the country, & identification of sources of information. What additional staff or capital is necessary to succeed with this global business plan.

# COMPANY OVERVIEW

## COMPANY PROFILE

### Company at a Glance (location/facilities/history/certifications)

### Vision & Mission Statement

### Organizational Structure (overview/org chart)

### What We Do (unique value proposition)

### Products

### Experience & Capabilities (awards/expertise)

### Focus Industries & Customers

### International Experience

## COMPANY RESOURCES

### Financial Resources (internal/external)

### Human Resources (strategy/structure/people/process)

### Physical Resources (internal/external/outsourcing)

### Intellectual Resources (patents, trademarks, IP agreements)

## SWOT ANALYSIS

### Strengths (internal, positive factors)

### Weaknesses (internal, negative factors)

### Opportunities (external, positive factors)

### Threats (external, negative factors)

## GOALS & OBJECTIVES

### Success Measures (KPIs)

### Short-term (< 2 years): Goals & Objectives

### Medium-term (2 - 4 years): Goals & Objectives

### Long-term (+ 4 years): Goals & Objectives

# INTERNATIONAL MARKETING STRATEGY

## MARKET SELECTION

### Key Target Markets

### Selection Criteria

### Success Indicator Worksheet

## MARKET ANALYSIS

### Market Overview

### Market Research

### Consumer Trends

### Other (i.e. Free Trade Agreements, local partnerships, etc)

## POLITICAL & REGULATORY

### Political

### Economic Considerations

### Regulatory

## PRODUCT ADAPTATION

### Product Modification

### Product Certifications

## MARKETING PLAN

### Product Scope

### Market Entry Strategies

### Initial Market Entry

### Future Products

### Distribution

# PLANNING, IMPLEMENTATION & CONTROL

## PLANNING

### Required Resources

### Sales Channels

## BUDGETING

### Pricing Considerations

### Funding

### Forecasts

## IMPLEMENTATION & ACTION PLAN

### Control

### Action Plan

# EXAMPLE ACTION PLAN

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Priority** | **Objective** | **Task** | **Resources** | **Schedule** | **Evaluation** |
| 1 | Create or revise export plan | Review export plan template | Your time or staff time to write the plan | Over the next 3 weeks | Completion of plan |
| 2 | Internationalize website | Use template to identify enhancements; | Task in-house or contract web folks | Complete within 30 days | Evaluate early interest & other international transactions |
| 3 | Learn more about international transactions | Review learning resources | Identify what you need to know & who in the company needs to know it | Complete within 60 days | Number of error-free transactions |
| 4 | Monitor transaction activities | Proactively spot sales opportunities | Identify staffing & scheduling | Start within 14 days | Number of sales leads via website or other channels |
| 5 | Develop database of international prospects & customers & e-mail new product offers | Create database & email template for sending promotions; use social media | Identify staffing & frequency of messaging; include opt out | Start within 30 days | Number of messages; open rate; sales |
| 6 | Secure product certificates if needed | Underst& the process, turnaround time, etc. | Staff time | Complete within 14 days | Certificate in h& if needed by importing country |
| 7 | Determine whether product needs an export license | Review government lists | Staff time | Complete within 14 days |  |
| 8 | Learn how to calculate duties & taxes | Review recommended links | Staff time; no charge for information | Complete within 14 days | Accurate calculation & communication to buyer |
| 9 | Use tariff code lookup | Identify tariff code for your products (HTS number) | Staff time; no charge for information | Complete within 14 days | Accurate completion of shipping documents |
| 10 | Establish pricing & returns policy | Calculate landed costs & make revenue projections | Staff time | Complete within 14 days | Establish revenue benchmarks |
| 11 | Meet your local government export resource | Understand the services available to your company | Staff time | Complete within 30 days | Value of assistance provided |
| 12 | Research a new market | Review recommended links in A Basic Guide to Exporting | Staff time | Complete within 120 days | Go or no go decision |
| 13 | Travel to the market with help from your private & government export resource | Meet potential distributors | $4000 | Complete within first year | New revenue |