

COMPANY NAME _____

INTRODUCTION TO EXPORT PLANS

It takes a systematic approach to export successfully. A key step in realizing success is documenting your plans in a comprehensive Export Plan.

If you plan your export efforts thoroughly, you will have a better chance for success in your target market. A well-designed Export Plan begins at home. It is built on a comprehensive domestic business plan that accurately reflects your current operations in your home country. If your business plan is out of date, now is the time to review and renew it. If you do not have one, this is definitely the time to create one. This simple process can help you to save time and resources by strategically planning and prioritizing your pursuit of export markets.

The template is organized according to the 4 stages in the GATEWAY to Trade programme. Please note that this is only a partial list of topics that need to be addressed in doing business internationally. The table format of this template can be very useful for building your plan. Some companies eventually move from this type of format to a more traditional report format for their plan. Either approach works, as long as you continue to work at it.



The Export Plan represents a long-term investment of your time, effort and resources. Involve your whole team – management, staff, associates and board of directors. They are all stakeholders in the success of the business and will have valuable contributions to make. The plan is a living document and will need your attention on a regular basis as your business evolves. Keep working with it. The rewards will be worth it.

Use this template, along with the SWOT exercise, Value Proposition exercise and website assessment to create your own plan.

(Insert Company Logo)

EXPORT PLAN

EXECUTIVE SUMMARY

In any business plan, the Executive Summary should be the last section to be written, as it represents a high-level summary of the contents of the plan.

The Executive Summary should summarize the major points, results of research, and decisions made. It should include, for example: the target export market, target customers in this market, export objectives, the market penetration strategy and any market intelligence or opportunity you may have acquired that you hope to capitalize on. Please note, that an Executive Summary is not a company profile.

The Executive Summary may be the most important part of your Export Plan – at least to those you hope will read it. Most interested parties will only read the Executive Summary before making a determination as to whether the rest of the plan should be perused. Use the Executive Summary as an opportunity to generate interest in what it is you hope to achieve.

The Executive Summary should be a maximum of one or two pages.

STAGE 1 – PREPARING YOUR BUSINESS

Company Description

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Description of Services	Features	Benefits
1.		
2.		
3.		
4.		

Value Proposition

Insert final value proposition from value proposition exercise

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Your Perfect Customer (or Partner)

Highlight 3 characteristics describing your perfect customer/partner

1.
2.
3.

Export Goals

Export goals should be SMART - specific, measurable, achievable, realistic, time-based

International
Market Goals

Action Items

Based on the results of your SWOT and Export Readiness Assessment note the actions your company should take to better prepare for export.

Who

Target
Date

Resources Required

1.

2.

3.

4.

Additional Comments
(Company)

Additional Comments
(Coach)

STAGE 2 – CONDUCTING MARKET RESEARCH

Market Research/Intelligence	
Include only information that is relevant to your company's export efforts.	
Market Demand	
Potential Clients	
Potential Partners	
Potential Competitors	
Potential Opportunities	
Potential Challenges	
Other	

Action Items	Who	Target Date	Resources Required
Note additional market research required, as well as the actions your company should take based on challenges and opportunities identified			
1.			
2.			
3.			
4.			
Additional Comments (Company)	Additional Comments (Coach)		

STAGE 3 – DEVELOPING A MARKETING PLAN

Marketing Collateral	None	Average	Excellent	Action Items
<ul style="list-style-type: none"> ▪ Marketing Plan ▪ Company Profile ▪ Messaging and Value Statements ▪ Portfolio ▪ Curriculum Vitae ▪ Testimonials ▪ Other 	<input type="checkbox"/> 	<input type="checkbox"/> 	<input type="checkbox"/> 	

<h3>Market Penetration Strategy</h3> <p>Describe your strategy to successfully penetrate your target market</p>

Action Items Based on the website assessment, current marketing materials, and proposed market penetration strategy, what actions must your company take to boost credibility and develop world-class marketing materials	Who	Target Date	Resources Required
1.			
2.			
3.			
4.			
Additional Comments (Company)	Additional Comments (Coach)		

STAGE 4 – ENTERING THE MARKET

MARKET ENTRY OPTIONS

Provide some insight on the below

Modes of Delivery	▪
Visa requirements	▪
Type of Strategic Alliance Desired	▪
Market Visit Objectives	▪
Other	▪

FINANCING NEEDS

Provide some insight on the below

Business Financing	▪
Market Development Financing	▪
Project Financing	▪
Other	▪

CONTRACTING AND LEGAL ASPECTS

Provide some insight on the below

Proposal Template Quotation Template Rate Sheet	
Non-Disclosure Agreement Template	
Contract Template	
Intellectual Property Protection	
Risk Management	
Other	

Action Items Based on the above what actions must your company take to prepare?	Who	Target Date	Resources Required
1.			
2.			
3.			
4.			
Additional Comments (Company)	Additional Comments (Coach)		

Overall Comments on Export Plan (Company)	Overall Comments on Export Plan (Coach)