

# EXPORT PLAN TEMPLATE

This template is designed as a guide to help you answer the key questions that will inform your decisions on how to enter a new export market.

Use the headings and topics to create a plan that is fit for your organisation.

For assistance, refer to the NZTE Export Essentials Guides for further information on key topics.

Remember, you don't know what you don't know, so it is important to seek the right advice for your business.

If you don't have one already, we highly recommend using a business coach or mentor to help guide you through the process.

Disclaimer: This tool is only intended as a general guide. We recommend you seek independent professional advice on any matter related to the specific use of the tool for your company.

## YOUR COMPANY NAME / BRAND HEADER

### CONTACT

DIRECT DIAL PHONE NUMBER:

POSTAL ADDRESS:

MOBILE PHONE NUMBER:

EMAIL ADDRESS:

PHYSICAL ADDRESS:

### ONLINE

WEBSITE:

GOOGLE+:

LINKED IN:

BLOG URL:

FACEBOOK:

YOUTUBE / VIMEO:

TWITTER

# BUSINESS OBJECTIVES, GOALS AND SWOT

CORE BUSINESS VALUES (What we do and don't do)	PURPOSE (Why we exist)	CUSTOMER VALUE PROPOSITION (The value we deliver to customers)
<p>What you stand for; ultimate set of behaviours and skills</p>	<p>What gets you out of bed in the morning? How do you inspire your staff to do good work for you? What is the positive impact that you have on the lives of the people you are trying to serve?</p>	<p>What is your product/service and why does your customer buy from you? How does your Value Proposition give your business a lasting advantage over your competitors and help drive you towards your ambitions?</p>
<p><b>What is your Big Hairy Audacious Goal?</b></p>		
EXPORT		OBJECTIVES
0-12 months	1-3 years	3-5 years
EXPORT		GOALS
0-12 months	1-3 years	3-5 years
<p>Outline your export goals (what do you want to achieve) in the short and long term: Ensure your goals are specific and measurable.</p>		

## SWOT Analysis

### Analysis of our Business

Include your advisors and key staff in this exercise.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

## Action plan

What actions will you take to address weakness and threats and take advantage of strengths and opportunities?

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

# TARGET MARKET OVERVIEW

## Country overview

Market size and key trends that are driving the growth and opportunity in this market.

## Macro factors

What are the macro economic factors in your selected country? Think about the potential risks or opportunities that these factors might pose.

- Economic environment (GDP, wealth, trade balance, etc.)
- Political environment in the target market
- Legal Environment
- Logistics (transportation and infrastructure issues)
- Tariff and non-tariff barriers (licenses, quotas, fees, documentation)
- Industry trends and other market factors (e.g. cultural, social, business practices)
- Ease of doing business

## Compliance issues

Compliance issues we have identified and how we have solved them or plan to solve them, for example:

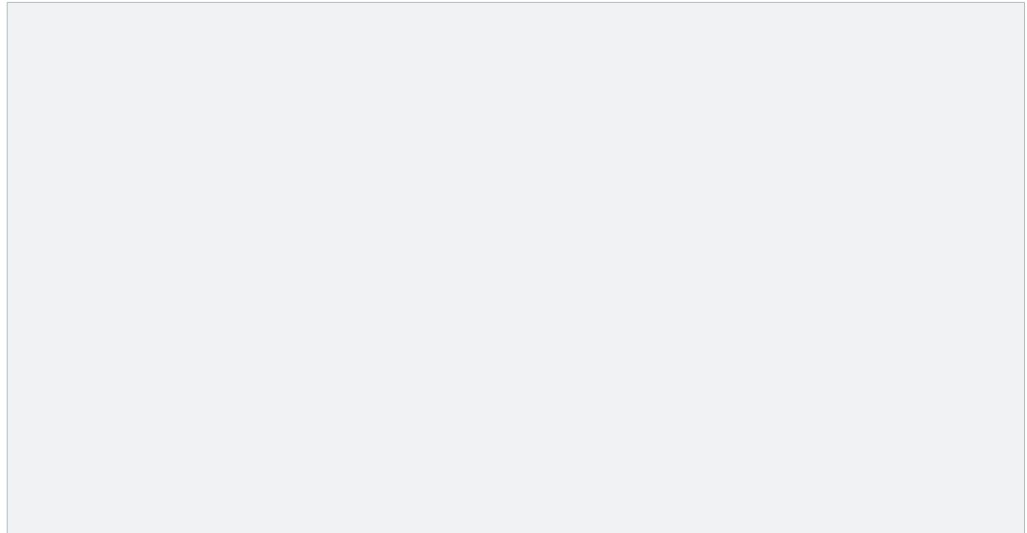
- Standards
- Certification
- Labelling and packaging requirements
- Registration
- Liability
- Barcodes and tracking
- Marking

# MARKET ENTRY STRATEGY

## Product for export market

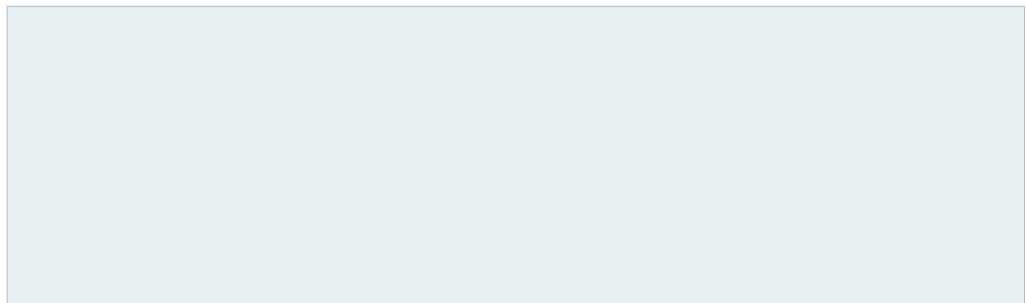
Which products or services will you sell and what adaptations or modifications might need to be made.

Think about seasonality, shelf-life and other life cycle issues, cultural differences, languages, etc.



## Market Niche

Outline the market niche that you have identified:



## Customer and market profiles

Outline your market segments in your chosen market and a brief strategy on how you will reach them, for example:

Who are they?

What do they do?

Why is your product/service relevant to them?

Where would they purchase your product/service?

If they are not the final purchaser, what is the role in the buying decision?

MARKET SEGMENT 1

MARKET SEGMENT 2

MARKET SEGMENT 3

## Demand validation

Outline your evidence that there is sufficient demand for your product/service in your chosen market to make it a viable option.

## Competitor analysis

Outline your competitors' strengths and weaknesses, and how you plan to compete against them:

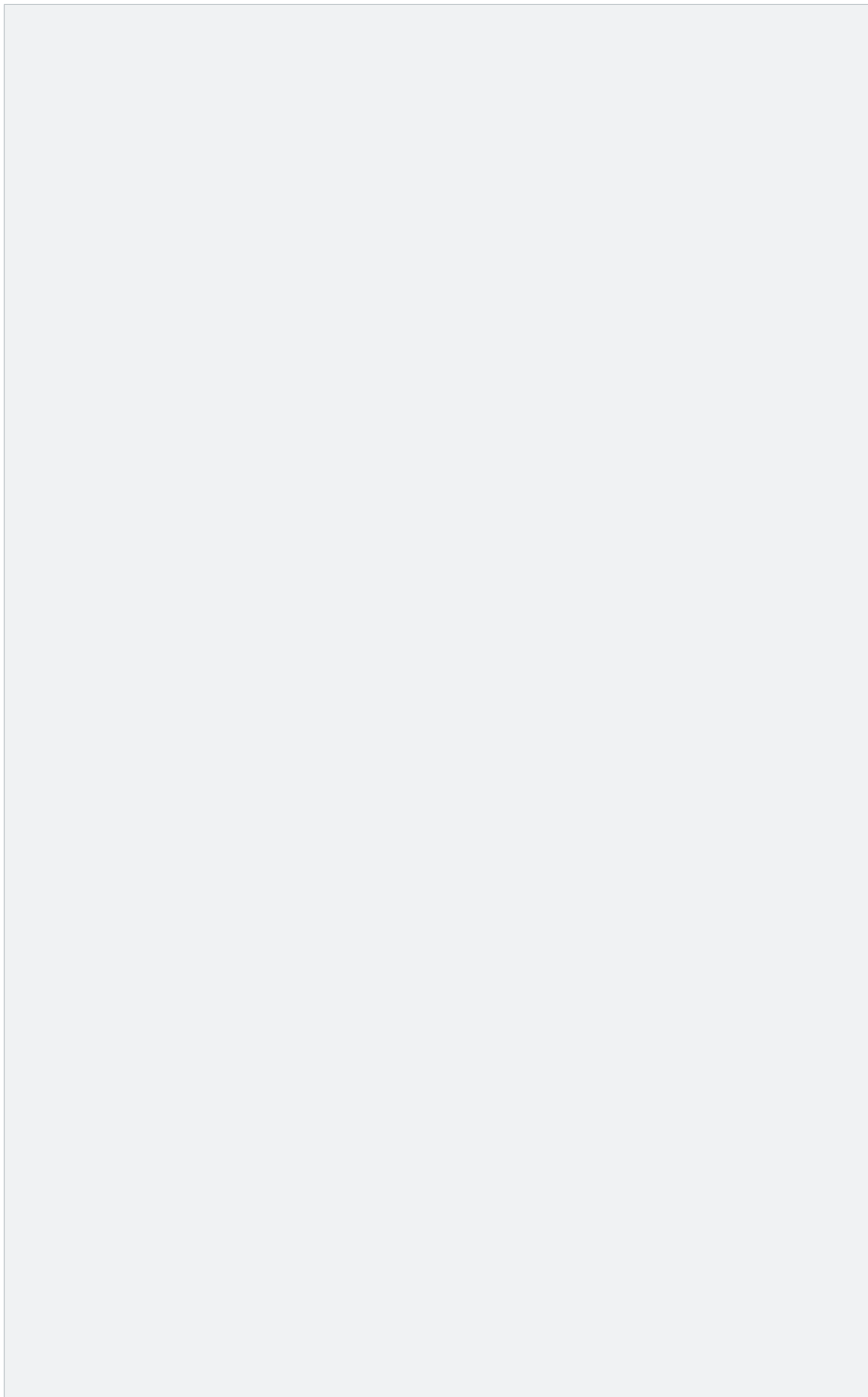
Cover your top three to five competitors.

COMPETITOR	STRENGTHS	WEAKNESSES	OUR RESPONSE
1:			
2:			
3:			
4:			
5:			

## Channel strategy

Outline how you plan to get your product or service to your customer, who you will be working with and why:

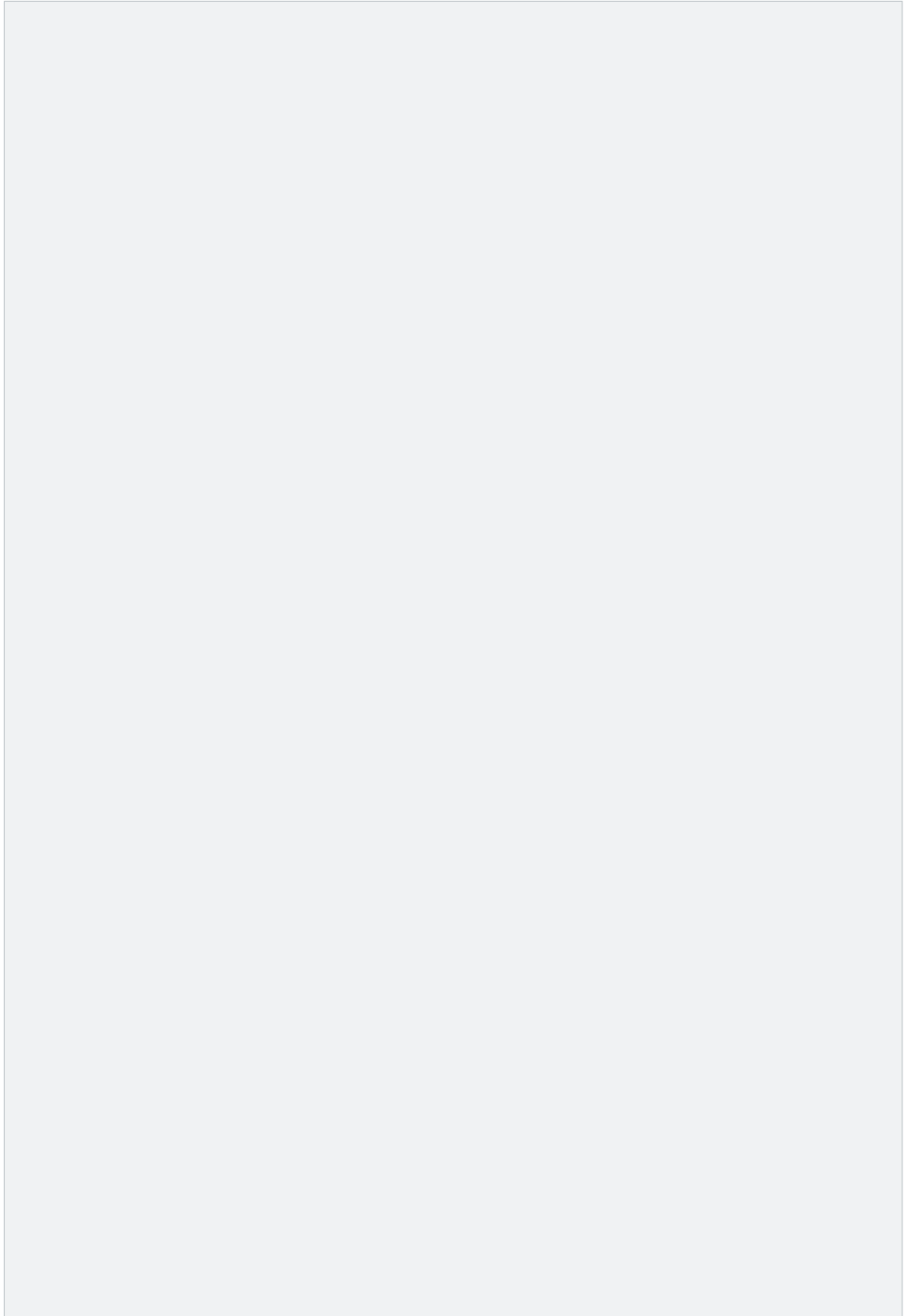
For example, shop, website, agents or distributors, wholesalers and retailers.





## Pricing strategy

Outline your selected pricing strategy and why. Include a stress test of your pricing strategy by outlining how you plan to manage your pricing in situation such as exchange rate fluctuations and competitor price drops, etc.

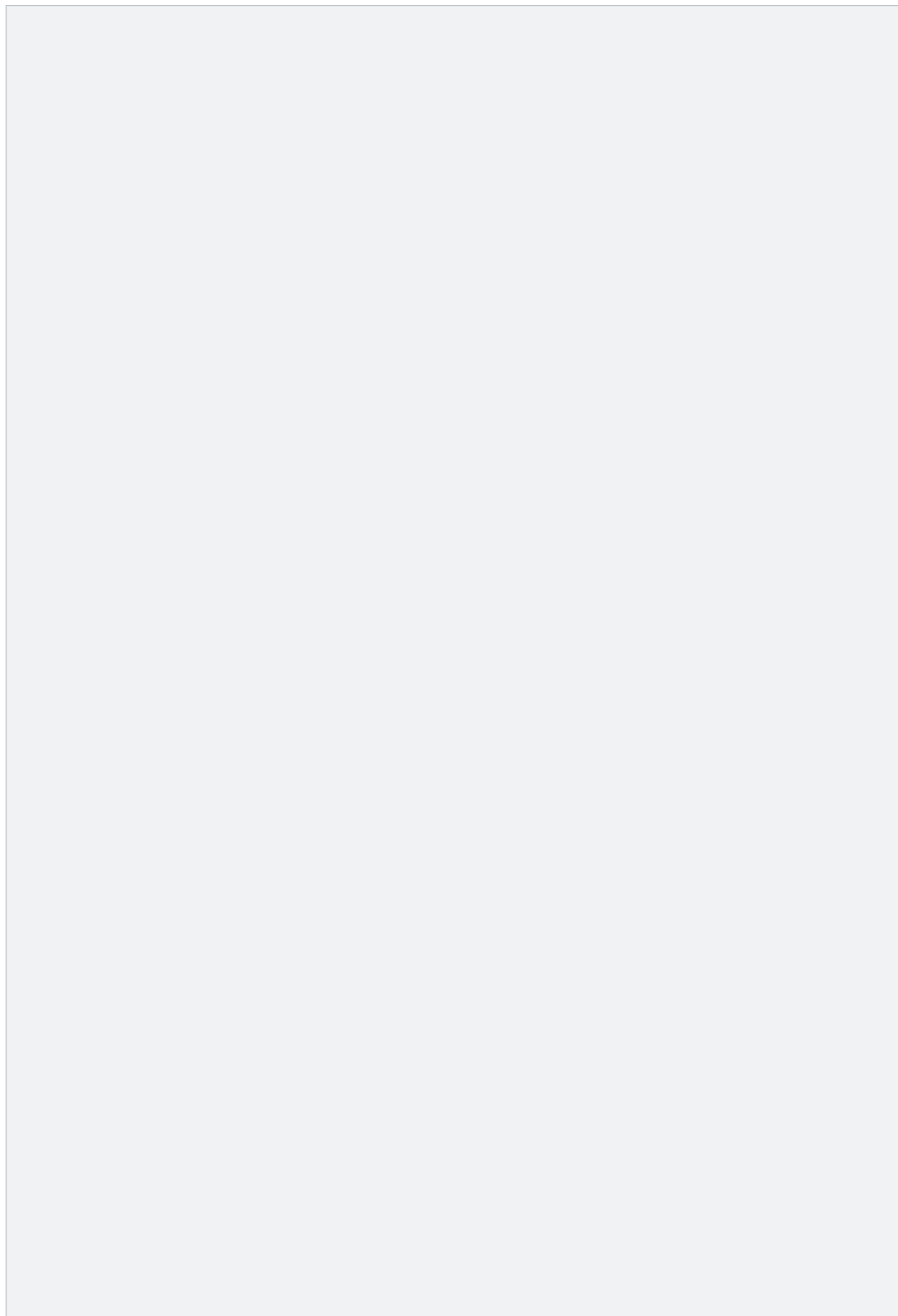


# SALES AND MARKETING

## Sales process

Detail your sales objectives for the first year and the process by which you will achieve them.

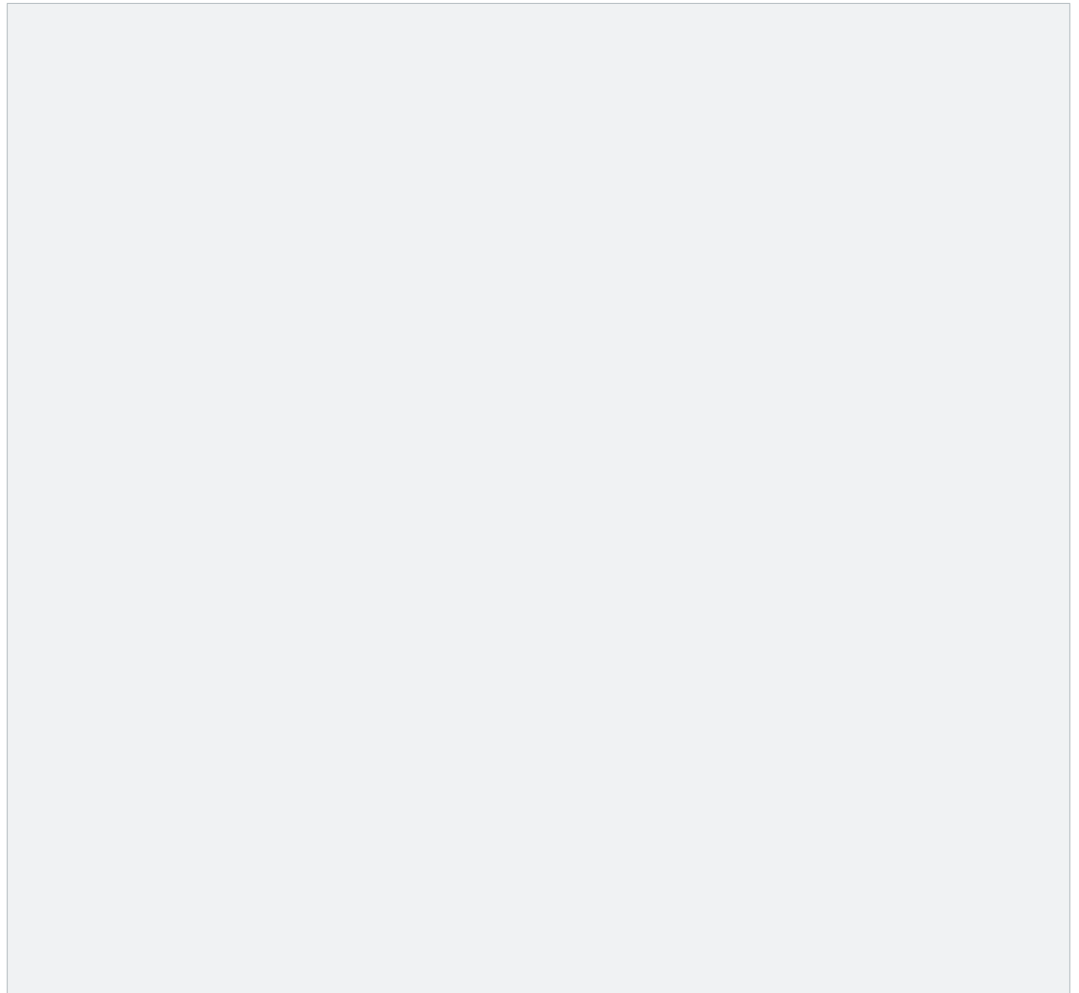
- How will you identify new customers, qualify and review and ensure that the right customers are being reached at the right time?
- How will you prioritise customer opportunities?
- How will you monitor customer acquisition costs?
- Do you operate a systematic, repeatable sales process?
- What are your and your channel partners' roles in the sales process?



## Marketing and Promotions activities

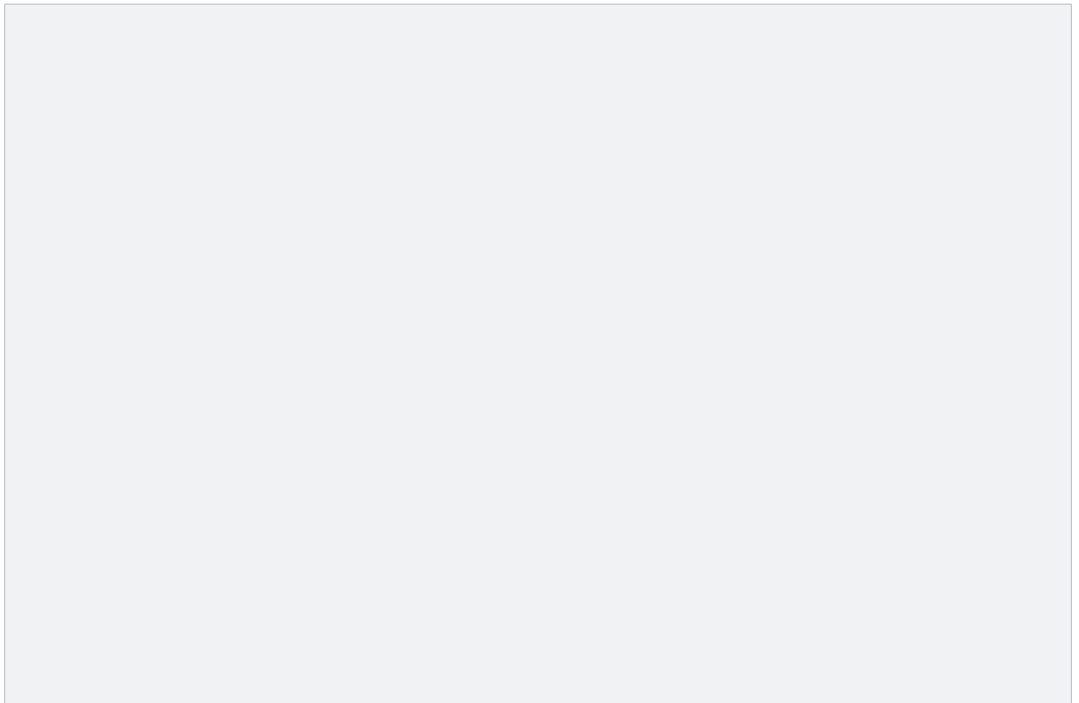
Detail your marketing and promotional objectives for the first year and how you plan to support your customers and partners to ensure that sales objectives are met. For example:

- Trade events
- Advertising
- Social Media
- Point of Sale
- In-store promotions
- Training for in-market partners
- After-sales service activities



## Marketing budget

Outline your marketing expenditure for the first year



## Branding and IP protection

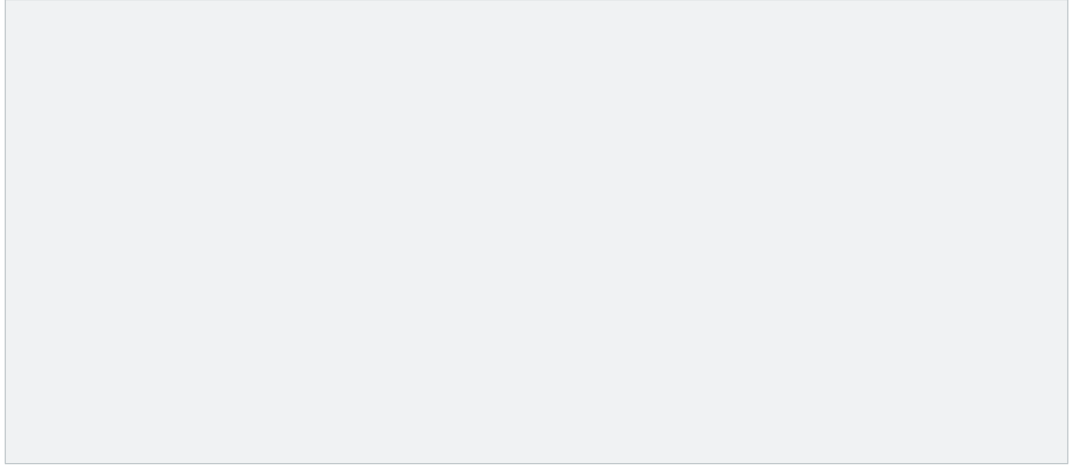
What Intellectual Property do you own and how will you protect it from being copied or damaged?

PROBLEM OR CONFLICT SOURCE	SOLUTION

# REQUIRED RESOURCES

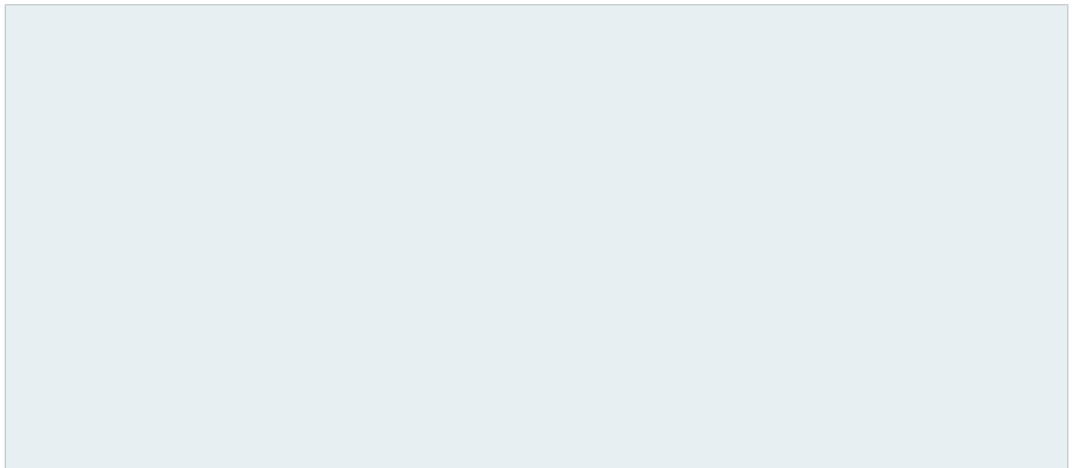
## Capacity requirements

Outline here any extra requirements that your business will need to ensure that you can meet the demands of your new market.



## HR requirements

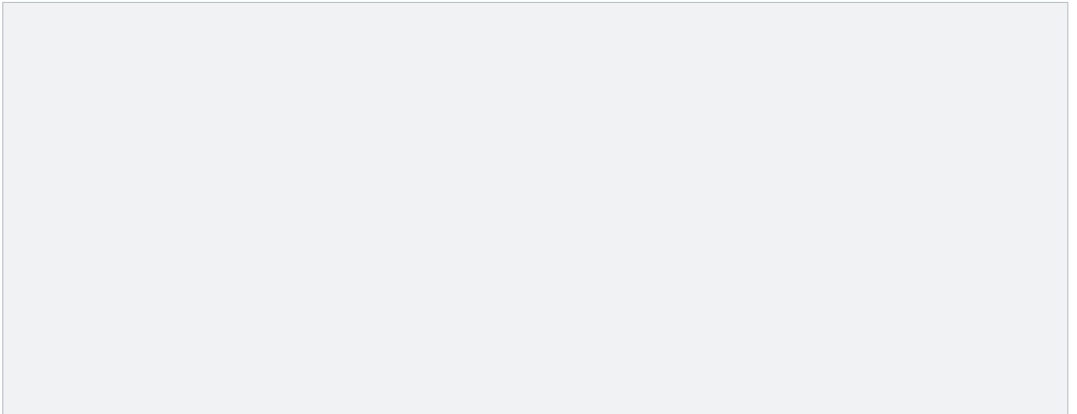
Include an outline of additional human resource requirements that you will need to ensure that your home market continues to thrive and that you can dedicate the time necessary to develop export markets.



## Business systems

Outline any changes to your systems that you will need to develop to ensure that you have consistent, repeatable processes that will allow you to scale.

For example, systems for accounting, budgets, tax and compliance issues, production and order fulfilment.



## Cost of sales

Outline your cost of sales for the first year.

## Working capital

Asses here any major changes to working capital that will impact your cash-flow in the first year, and how you plan to address them.

- Increased level of inventory to support new markets
- Purchase of new machinery
- New staff to cover exports

## Cash flow forecast

Address how your business will manage cash-flow in the first year. summary of our cash flow forecast:

- Cash flow forecast attached

## Export ROI

Define how long your business is able to withstand the additional expenditure until the export business generates profits.

Remember that export sales almost always take longer to develop than originally anticipated.

## Monitoring performance

The Key Performance Indicators we plan to use to monitor business performance:

### FINANCIAL KPIs

### MARKETING KPIs

### SPECIFIC KPIs THAT DRIVE OUR BUSINESS

## Attachments

List the financial documents attached to your Business Plan.