

1. VISION STATEMENT

Define your purpose and objectives for entering international markets.

* **Prompt:** What does success in exporting look like for your business?
  + Example: “Our vision is to become a recognized leader in sustainable packaging in European markets, driving 25% of revenue from exports within two years.”

2. MARKET RESEARCH

Identify and analyze your target markets, focusing on demand, customer preferences, and competition.

* **Target Countries:** List your top 2-3 target countries and any early signs of demand.
* **Market Demand:** Describe how your product or service meets the needs or trends in each target market.
* **Competitive Analysis:** Identify key competitors in each market, their strengths and weaknesses, and how your offering compares.

*Industry-Specific Customization:*

* **Product-Based:** Assess if similar products are popular in each market and consider demand trends (e.g., organic certification or sustainable packaging requirements).
* **Service-Based:** Determine if your service requires localization, such as language adaptation or cultural sensitivity.

3. COMPLIANCE & DOCUMENTATION

Identify regulatory requirements, necessary documentation, and certifications for each target market.

* **Key Regulations:** List the specific regulations (e.g., safety standards, environmental certifications) that apply to your product or service.
* **Required Documentation:** Detail all necessary documents (e.g., customs forms, import/export licenses, compliance certifications).
* **Testing, Certification Needs:** Outline any testing or certification required for compliance in your target markets.

*Industry-Specific Customization:*

* **Product-Based:** Food, cosmetics, or electronics may require ingredient labeling, safety testing, or environmental certifications. Some products may require reformulation to comply with local regulations.
* **Service-Based:** Intellectual property (IP) protections or data compliance, such as GDPR in the EU, may be required.

4. PRICING STRATEGY

Develop a competitive pricing strategy that includes local market conditions, currency considerations, and profit margin targets.

* **Pricing by Market:** Determine pricing for each target market based on local demand and competitor pricing.
* **Currency & Conversion:** Plan for fluctuations in currency and whether you’ll list prices in local currency.
* **Profit Margin Goals:** Calculate target profit margins after factoring in local costs, tariffs, and shipping expenses.

*Industry-Specific Customization:*

* **Product-Based:** Include tariffs, import duties, and distribution costs in your calculations.
* **Service-Based:** Consider local rates for similar services, adjusting for factors like currency volatility or billing preferences (e.g., subscription vs. one-time fees).

5. LOGISTICS & SHIPPING

Outline your logistics plan, including shipping methods, warehousing, and customs handling.

* **Shipping Methods**: Describe whether you’ll use air, sea, or land transport, and evaluate providers in each target region.
* **Warehousing Needs**: Decide if you need local warehousing, drop shipping, or fulfillment services.
* **Customs & Duties**: Plan for customs clearance, import duties, and tax considerations.
* **Returns:** Create a clear communication plan for your returns policy and build this into your shipping and logistics plan.

*Industry-Specific Customization*:

* **Product-Based**: Focus on temperature-controlled shipping for perishables, bulk shipping options for heavy items, or special packaging for fragile products.
* **Service-Based**: If applicable, address any digital delivery methods, local server requirements, or logistics for physical equipment associated with the service.

6. MARKETING & SALES STRATEGY

Develop a marketing and sales plan to attract and retain customers in each target market.

* **Market Positioning**: Describe how your product or service will stand out in the target market.
* **Sales Channels**: List primary sales channels, such as e-commerce, retail partnerships, or trade shows. Review your website for internationalization or localization to improve customer acquisition and retention.
* **Marketing Tactics**: Outline specific marketing methods, like social media campaigns, localized content, influencer partnerships, or region-specific promotions.
* **Customer Service Plan:** Research your target markets to understand customer service expectations and build them into your customer service plan.

*Industry-Specific Customization*:

* **Product-Based**: Consider local partnerships with retailers, cultural customization of branding, or leveraging local holidays for promotions.
* **Service-Based**: Focus on language localization, partnership with local service providers, or digital marketing channels (e.g., LinkedIn for B2B services).

7. FINANCIAL PLAN & RESOURCES

Prepare a financial overview that includes your investment plan, revenue projections, and funding sources.

* **Initial Investment Requirements**: Calculate initial costs, such as regulatory fees, marketing, and logistics setup.
* **Revenue Goals**: Set revenue targets based on expected sales in each target market.
* **Funding Sources**: Identify resources to support your export plan, such as grants (e.g., STEP grants), loans, or partnerships.

*Industry-Specific Customization*:

* **Product-Based**: Include costs for production scaling, quality control, and inventory management.
* **Service-Based**: Consider investments in digital infrastructure, training for localization, and professional services (e.g., legal support for compliance).

8. RISK MANAGEMENT & CONTINGENCY PLAN

Outline potential risks and your strategies to mitigate them.

* **Identified Risks**: List specific risks, such as currency fluctuations, compliance delays, or supply chain disruptions.
* **Mitigation Strategies**: Detail how you’ll address each risk (e.g., hedging against currency risk, diversifying suppliers).
* **Contingency Plans**: Define backup plans in case of delays, compliance issues, or unexpected costs.

9. IMPLEMENTATION TIMELINE & MILESTONES

Create a timeline that breaks down the steps needed to implement your export plan.

* **Short-Term Milestones**: Identify actions to complete within the next 3–6 months.
* **Long-Term Milestones**: Outline goals for the next 1–2 years as you expand your export activities.
* **Key Performance Indicators (KPIs)**: Set KPIs for tracking progress, such as sales volume, customer acquisition, and return on investment.

This template is intended to be flexible, so customize each section as needed to fit your business model and industry. With this plan, you’ll be able to track progress, adjust strategies, and create a clear roadmap for successful international growth.