

GEENYUS! CHECKLIST: BUSINESS EXPORT READINESS ASSESSMENT- A2IM

Company:

Contact:

Title:

Address:

Telephone:

Fax:

Email:

Website:

Visited by:

Date of Visit

Date Report Completed:

Company added to CRM: Y/ N

I. COMPANY BACKGROUND

1. Describe company industry and product line (get copies of product literature; price lists):
2. Number of years in business? Year established?
3. Describe company organization structure:
4. Number of employees? Annual sales? Export sales?

II. GOING GLOBAL: EXPORT EXPERIENCE

1. Why does the company want to start or increase export activity? (check all that apply)
 - a. To increase profits thereby increasing jobs
 - b. To level sales peaks and valleys
 - c. To maximize use of installed capacity
 - d. To diversify risk
 - e. To keep up with the competition
 - f. To satisfy customer demand
(websites hits; trade show or other inquiries)
2. Is management clearly committed to international market expansion? Yes/ No
[Caution: The greatest barrier to successful exporting is the mindset of the CEO]
3. Does the business have an exportable product or service? (describe; Y/N) **A2IM WILL COMPLETE THIS SECTION FOR ALL A2IM MEMBERS**
 - a. Review statistics from Census Bureau for level of US exports: _____
 - b. Does product have a solid market share in US domestic market? Yes ___% No
 - c. Is the weight/volume of the product reasonable given freight costs? Yes No
 - d. Is management willing to modify products to satisfy market conditions or foreign regulations? Yes No
 - e. Can the technology be licensed instead of exporting the product? Yes No
 - f. Are services delivered through/ with foreign partners (e.g. professional services)?

4. Where are the most promising markets? **A2IM WILL COMPLETE THIS SECTION FOR ALL A2IM MEMBERS**

- a. List current and past export markets: _____
- b. Describe exporting frequency; difficulties or barriers encountered: _____
- c. Inquiries from websites or trade shows indicate interest in product or service? Y/N; Describe: _____
- d. Describe specific interest in new potential markets in China and S. Korea, other: _____
- e. Internal/ external market conditions causing demand to increase or decrease? _____
- f. Who are company's competitors (global markets and market share)? _____

III. MAKING THE SALE: MARKETING PLANS

1. How and to whom are the products or services sold (advertising and promotion)?
 - a. Describe sales/distribution methods; marketing channels: _____
 - b. Describe company's domestic target markets and customers, including geographic and demographic characteristics.
 - c. What were the key results/ conclusions of any market research done?
- 2.. Which products and/or services demonstrate the greatest domestic and/or international success? What are the respective market shares?
3. What are the company's plans/ budget for meeting international marketing goals?
 - a. Company interest in identifying potential representatives, distributors or partners through ESD-GEENYUS!? Yes___ No___
 - b. What domestic and/or international trade shows does the company now attend? List: _____
 - c. Company interest in participating in targeted trade shows or missions to find appropriate reps or distributors? Yes___ No ___

IV. CLOSING THE DEAL: SALES LOGISTICS

1. How does firm respond to inquiries? _____ How soon? _____ Who responds? _____ What language(s)? _____ Samples sent? Yes/ No Export price list? Yes/ No
2. Has company considered financing, and are its bankers willing and able to consult on foreign sales collections, etc? Yes/ **No** Preferred payment methods: _____
3. How are products shipped internationally? _____ Special requirements? _____ [Freight forwarders provide information regarding the shipment of products from their source to their destination by the most efficient means. Additionally, forwarders are well-versed in export documentation.]
4. Does the company have appropriate legal advice for international transactions? Yes No [Possible attorney uses: contracts, intellectual property protection, product liability, etc.]

5. What package or ingredient changes are needed for export? **Translations** _____
6. Has promotional information on products/ services been translated into the language of the targeted market(s)? Yes _____ No _____
 [Translators can translate material and manuals into many languages with appropriate sensitivities to cultural nuances.]

V. PROVIDING ASSISTANCE: ACTION PLAN TO BE COMPLETED BY ESD

1. Company requests assistance, customized research or follow-up:
 - a. Targeted markets: _____
 - b. Trade leads: _____
 - c. Sales/ Distribution channels: _____
 - d. Logistics/ Shipment: _____
 - e. Trade finance: _____
 - f. Export education/ training: _____
 - g. Other: _____
2. Referrals made to: DOC-EAC/ DC SBDC ExIm TDA Other _____
 for the following services: _____
3. Company qualified for program assistance: EMAS GEMS
4. Company recruited for trade show/ mission/ event: _____
5. Additional non-trade-related technical assistance needed: _____
6. Company not interested in exporting at this time. Reason: _____