

ANNOTATED TABLE OF CONTENTS FOR SBA EXPORT BUSINESS PLANNER

Chapter 1. Using This Planner **03**

This brief introductory section gives preliminary instructions and tips on working through the planner. It shows how the interactive worksheet sections function within the PDF file and gives tutorials on filling out and printing worksheets. Tips are given on saving your work and finding supplementary resources.

Chapter 2. Introduction to Exporting **08**

Basic facts are given on what it means to export. A landmark study on exports by Howard Lewis III and J. David Richardson is discussed.

Service Exports, which are increasingly viable and attractive, are the subject of the first section.

Should You Export? Benefits and tradeoffs of exporting for your business are discussed and myths about exporting are dispelled.

Federal programs and the increased interest of the government in exports are the topic of **Government's Role: Working together to ensure success.**

A list of links to **SBA Video clips** promoting exporting is given to the reader in this chapter.

What's in it for your business? This section highlights the positive effects of exporting for businesses.

Resource list for beginning exporters contains links to some federal resources for beginning exporters.

Chapter 3. Training and Counseling **16**

This section summarizes how **SBA District Offices, Small Business Development Centers, SCORE, Women's Business Centers, U.S. Export Assistance Centers** help businesses.

Chapter 4. Getting Started: Creating an Export Business Plan

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The **Importance of Planning** section highlights the benefits and importance of planning in the initial stages of exporting. Keys to discuss and planning steps are discussed.

Export Readiness worksheets for profiling your current business are provided, as well as resources for conducting an industry analysis, identifying products with export potential, and finding profitable foreign markets.

The third section of the chapter discusses different **harmonized product classifications**; **identifying the largest and fastest-growing markets for your product**; and **market research resources**.

Next, federal resources for **determining your expansion needs** are provided, followed by worksheets for **setting short term and long term export goals**.

Chapter 5. Developing Your Marketing Plan

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This chapter of the planner provides information, references to resources, and a large number of worksheets on the topics of:

- In-Depth Exploration of Chosen Markets
- Your Industry in Global Markets
- Determining Your Method of Exporting
- Marketing Your Product/Service
- Practical Needs for Marketing Your Product
- Defining Your Marketing Strategy
- Identifying Customers within Your Chosen Markets
- Entering Foreign Markets
- Getting Your Product Export-Ready
- About ISO Certification

Chapter 6: Financing Your Export Venture

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Locating an SBA lender and provides a link to an SBA-compiled list of all export lenders. It then provides information on the **SBA Export Express**. This program's features are briefly listed and frequently asked questions are answered.

Next, detailed information on the following is given:

- The **Export Working Capital Program**, which is meant to increase flexibility in negotiating export payment terms through loans that are given in advance of finalization of an export sale or contract.
- The **International Trade Loan (ITL)**, which is designed to help you enter and expand into international markets and, when adversely affected by import competition, make the investments that are necessary to better compete.
- **Export-Import Bank of the United States**, which assumes the credit and country risks that private banks are unable or unwilling to accept.

Chapter 7. Accounting Worksheets: Costing, Financial Forecasting and Product Pricing

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Accounting analysis that should be performed to evaluate how exporting will affect your business is the first topic of the chapter. Brief instruction and worksheets to complete are given on the following:

- Forecasting Your Sales
- Projecting the Cost of Goods Sold
- Export Costing
- International Marketing Expenses
- Calculating Projected Income
- Your Break-Even Analysis

A multitude of **International Payment Methods** are described next in the chapter.

Product pricing is the next focus of the chapter, with the following topics discussed:

- Two **Methods of International Pricing** for exporters' goods are discussed in following section.
- Various **International Expenses** that businesses may incur in the process of internationalizing a product.
- Finding the correct **Price for Your Product**.
- **Other Pricing Factors to Consider**, such as market demand and competition.

Setting Terms of Sale is the final topic of the chapter.

Chapter 8. Utilizing Technology for Successful Exporting **128**

General E-Commerce and **E-Commerce Tools** are the first topics covered by this chapter. **Equipping Your Business with Technology** that is adequate to engage in E-Commerce is the final topic. This section has a focus on basic needs, such as teleconference capability and a website.

Chapter 9. Your New Marketing Plan: Summary, Timeline and Updates **135**

Chapter 9 provides brief instructions on worksheets for **Timetable Steps**, Marketing Plan Summary, Export Programs & Services

Utilizing SBA Export Express Resources is again stressed in this chapter, which outlines how the program can help to fund your exporting needs.

Chapter 10. Transportation and Documentation **147**

The **Role of the Freight Forwarder** is discussed in this section of the chapter. Freight Forwarders are resource that should be familiar with the legal and logistical aspects of exporting and will perform these functions for you.

Which **Mode of Transportation** to use for your exports, **documentation** for your business and export shipments, **packaging** methods and markings; and acquisition of **Temporary Export Licenses and ATA Carnets** are covered in the remainder of the chapter.

Resources **157**

Glossary of Terms and Acronyms **163**

List of Forms and Worksheets **186**

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