Export plan template

A solid export plan will help you decide on your long-term goals for your business. It will also give you a better grasp of what support you’ll need to reach them. This template helps you create a robust export plan that sets you up for success.

Do Export Essentials as you fill out this template

To get the most out of this template, we recommend you do the Export Essentials course. It’s free and online, and focuses on best practice for selling internationally. You can do it at your own pace or join a guided group. We’ll tell you when to do which modules.

[Export Essentials](https://my.nzte.govt.nz/article2/about-exported) — my NZTE

Get business advice

Finally, make sure you get the right advice for your business. We highly recommend using a business coach or mentor.

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| [Types of advice you’ll need](https://www.business.govt.nz/getting-started/advice-and-governance/types-of-advice-youll-need/) — business.govt.nz[How business advisors can help](https://www.business.govt.nz/getting-started/advice-and-governance/how-business-advisors-can-help/) — business.govt.nz |

All the best on your export journey!

business.govt.nz

New Zealand Trade and Enterprise (NZTE)
Te Taurapa Tūhono

How to use this template

When using this export plan, keep your reader in mind. That will help you decide how much information to put into it. For example, you might want to:

* use it for internal discussions
* share it with NZTE when you get their advice
* show it to your bank or guarantor when you’re getting a loan.

Fill out your plan gradually

Fill out your plan in chunks so you don’t get overwhelmed, in the order that feels right for your business.

You won’t have all the information you need immediately. That’s fine. The template gives you a good overview of what goes into an export plan, and what information you might need to get.

Include supporting documents

Attach any supporting documents you’ll include with your export plan, such as:

* financial documents (eg export costs or pricing spreadsheet, profit and loss statements, and break-even analysis)
* surveys
* resumes
* inventory lists.

Let us give you a hand

Look out for grey boxes. They contain links to useful resources, including relevant modules in Export Essentials.

If you’ve tried to fill in this template and need more help, you can contact an NZTE advisor.

0800 555 888

exporthelp@nzte.govt.nz

Export plan for

Plan history

Treat your plan as a living document. Keep it handy and update it whenever something changes in your business or when you get new information. Use this table to keep track of who has reviewed and updated your export plan.

|  |  |  |
| --- | --- | --- |
| **Date** | **Changes made** | **Name and role** |
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# Part 1: Know your business

If you want to export, you’ll have to know your business well. Start by thinking about your purpose and why you want to export.

## What’s your company’s purpose?

If you’re going into an overseas market, your business needs have to a strong sense of purpose. Why does your company exist, beyond making money? Why does what you do matter?

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| A clear purpose attracts employees, customers and investors, and motivates them to stay connected to you. Re-affirm your company's purpose statement. |
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| [Check out “Doing business for good” if your purpose is about doing good for the community or the environment](https://www.business.govt.nz/doing-business-for-good/doing-business-for-good-an-overview/) — business.govt.nz |

## Is exporting the best way for you to grow?

Being really clear on your long-term business goals is important. Will exporting help you reach them?

What’s driving you to export? What are you hoping to achieve?

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What goals or measures do you want to reach?

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How likely are you to achieve your goals and measures?

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| [Find out what you need to know about exporting](https://www.business.govt.nz/how-to-grow/exporting/what-you-need-to-know-about-exporting/) — business.govt.nz |

# Part 2: Know your market and customers

Knowing your market and customers well is vital to success.

## Which export market is the right choice?

The best way to avoid wasting time and money is to follow certain steps when choosing your export market, and to focus on one market at a time.

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| [Read about choosing an overseas market](https://www.business.govt.nz/how-to-grow/exporting/create-a-good-export-plan/) — business.govt.nz |

### List possible markets

This approach involves the following steps.

1. Identify what matters most to your business.

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2. List the countries that might offer the things that matter most. Exclude countries that are politically unstable or where it may be hard to get profits out.

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| Think about:* places you’ve travelled to, read about or researched
* places you’ve received enquiries, interest or web traffic from
* contacts who could help you launch in a market
* markets that New Zealand has free trade agreements with
* markets you can get to easily.
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|  |

3. Sort the remaining markets against the factors you identified in step 1.

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Finished? Hang on to your list. You’ll come back to it after the “Do market research” section.

### Do market research

Thoroughly researching the market you want to export to is important. The more research the better.

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| --- |
| [Plan your research](https://www.business.govt.nz/how-to-grow/exporting/create-a-good-export-plan/) — business.govt.nz[Do the research](https://www.business.govt.nz/business-performance/marketing-strategy/marketing-strategy-overview/) — business.govt.nz |

|  |
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| Use free information and tools online[Find information on specific markets and industries](https://my.nzte.govt.nz/discover?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE[See what free-trade agreements are in force](https://www.mfat.govt.nz/en/trade/free-trade-agreements/free-trade-agreements-in-force/) — Ministry of Foreign Affairs and Trade [Use Tariff Finder to compare tariff rates between markets](https://www.tariff-finder.govt.nz/) — Ministry of Foreign Affairs and Trade [Play with StatsNZ’s Trade Dashboard](https://statisticsnz.shinyapps.io/trade_dashboard/) — StatsNZLook on government websites for useful information about their respective countries. |

|  |
| --- |
| Talk to people operating in the markets you’re considering[Contact New Zealanders and friends around the world](https://keanewzealand.com/) — Kea[Contact chambers of commerce](https://www.newzealandchambers.co.nz/new-zealand-chamber-network/) — New Zealand Chamber Network[Ask an NZTE customer advisor to recommend an exporter to talk to](https://www.nzte.govt.nz/form/contact?form=export?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — NZTE[Speak to freight forwarders and customs brokers](https://www.cbaff.org.nz/about-us/contact-us) — Customs Brokers and Freight Forwarders Federation of New Zealand |

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| --- |
| Find out what customers want[Find out what your customers want and how they think](https://www.business.govt.nz/business-performance/marketing-strategy/what-your-customers-want-and-how-they-think/) — business.govt.nz |

### Go back to your shortlist

Review the markets you shortlisted in “List possible markets” against what you’ve found in your research.

Write down the one or two export markets that seem to be the best fit with your product or service.

|  |
| --- |
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| Use our market comparison tool to compare markets you’ve researched.[Download the tool](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fassets.ctfassets.net%2Fpn8wbiqtnzw9%2F4vstwN4MidlGrn2yq2p6PH%2F9b6b061d02dc211af40f782db8ec08f4%2FMarket_Comparison_Tool.xlsx) (XLSX) — Google Sheets Open the link, select File → Save as → Download a copy[Watch this 2-minute video on how to use the tool](https://youtu.be/8I2JRKk36dU) — YouTube |

### Work out your ideal market size

What size market do you want to export to?

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| --- |
| “Size” can be volume (the number of units you expect to sell), or value (the dollar value of those sales). |
|  |

|  |
| --- |
| [Learn about market sizing](https://my.nzte.govt.nz/essentials/exportessentials/choosing-export-markets/market-validation/market-validation/market-sizing?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials |

### Segment your customers

Customer segmentation is grouping your customers by things that are relevant to your business, eg age, area, attributes and traits, or behaviour. Segmentation helps you find and target the people most likely to buy what you’re selling.

What is the demand for your product or service in this market?

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| --- |
|  |

What types of customers do you want to target?

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| --- |
|  |

 **What does each customer group want?**

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| --- |
|  |

|  |
| --- |
| [Learn about customer segmentation](https://my.nzte.govt.nz/essentials/exportessentials/choosing-export-markets/market-validation/market-validation/customer-segmentation?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials[Marketing and selling your products or services](https://www.business.govt.nz/how-to-grow/boosting-sales/marketing-and-sales/) — business.govt.nz |

## Who’s your competitor in your target market?

It pays to really analyse your competition before entering an export market. New Zealand businesses often find competition overseas is tougher than at home.

Using a market research agency is a good idea if you’re serious about an export market. They can get you specific information to help you analyse your competition.

Write down three companies you’ll compete with in your export market.

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|  |

What’s your competitive advantage? What are you offering that they’re not? Why should anyone care?

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|  |

# Part 3: Know what resources you need

Even if you’re confident about demand in a new market, you need to make sure you have what you need before you start exporting.

|  |
| --- |
| [Learn about resource planning](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/resource-planning?tabIndex=1?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials |

## What resources do you need?

Have a go at filling this out.

|  |
| --- |
| **People and culture requirements** |
| * What extra skills will you need to bring into your team or invest in over time?
* Where will these skills or resources be located?
* What role will they play in your export plan?
* What will it cost approximately? For example, you may estimate $15,000 for recruitment.
 |
| Requirement |  |
| Action needed |  |
| Date needed |  |
| Person responsible |  |
| Costs |  |

|  |
| --- |
| **Systems and infrastructure requirements** |
| * What changes will you have to make to scale internationally and prepare for your target market?
* How will you handle shipping and logistics?
* What will it cost approximately? For example, it might cost $2,500 to upgrade your customer database.
 |
| Requirement |  |
| Action needed |  |
| Date needed |  |
| Person responsible |  |
| Costs |  |

|  |
| --- |
| **Market and customer requirements** |
| * What market do you want to operate in?
* What are you offering?
* How will you need to change your product or service for that market? How will you need to change your sales and marketing strategies?
 |
| Requirement |  |
| Action needed |  |
| Date needed |  |
| Person responsible |  |
| Costs |  |

|  |
| --- |
| **Financial requirements** |
| * Do you have enough capital to meet your sales goals?
* What do your shareholders expect?
* How much profit do you want to make?
 |
| Requirement |  |
| Action needed |  |
| Date needed |  |
| Person responsible |  |
| Costs |  |

## Are you getting those resources?

Keep track of whether you can get the resources you need. Copy and paste the table if you need more room.

|  |
| --- |
| **[What you’ve asked for]**  |
| Application details |  |
| Date sent |  |
| Date response received |  |
| Contact person (name, email, phone) |  |
| Other notes |  |

## How will you fund your export plans?

Exporting can put a big financial strain on your business, and breaking even will take time. Think about whether you’re likely to have these extra costs.

|  |  |
| --- | --- |
| **Type of cost** | **Are you likely to have this cost?** |
| New equipment to increase production | Yes / No |
| Extra staff | Yes / No |
| Market research and other agencies you outsource work to (eg a distributor) | Yes / No |
| Shipping delays | Yes / No |
| Travel  | Yes / No |
| Set-up costs | Yes / No |

Work closely with your financial advisor and accountant to calculate your selling price, likely sales and break-even point (how much you must sell to cover costs). They may be able to help you with trade insurance to cover payment risks and make your cashflow easier to manage.

If you need funding, you could consider selling a share of your business, or getting a loan.

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| [Learn about funding your expansion overseas in the free InvestEd course](https://my.nzte.govt.nz/essentials/invested/?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) —myNZTE[Learn more about finance and modelling](https://www.business.govt.nz/how-to-grow/exporting/create-a-good-export-plan/#e-30347) — business.govt.nz[Get financial help](https://www.business.govt.nz/how-to-grow/exporting/create-a-good-export-plan/#e-30350) — business.govt.nz |

# Part 4: Know your marketing mix

Selling is easier if you have a clear value proposition statement (sometimes called a “unique selling proposition”). You use this statement to reach would-be customers, so you need to make sure you’re telling them the right things. You may want to adapt your value proposition for your overseas customers.

Write your value proposition in 25 words or fewer.

|  |
| --- |
| What emotional need are you meeting for your customers? Why would they choose your product or service? |
|  |

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| [Learn to develop your unique selling point](https://www.business.govt.nz/getting-started/building-a-brand/developing-your-unique-selling-point/) — business.govt.nz[Learn how to write a good value proposition](https://my.nzte.govt.nz/article2/how-to-attract-consumers-in-a-new-export-market?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE |

## How will you price for export?

You’ll want to fully understand everything that affects what you can charge for your product or service in your export market.

|  |
| --- |
| [Use our “Pricing your products for export” template to understand export costs](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fassets.ctfassets.net%2Fpuga2cn07wue%2F67vzr071t8iKAvj2CvjOKe%2F43afcdee68139621a9701fa060fa4025%2FPricing_your_products_for_export.xlsx) (XLSX) — Google SheetsOpen the link, select File → Save as → Download a copy |

### What are your costs?

Do you plan to offer any discounts? If you do, what are they? Can you afford a discount strategy?

|  |
| --- |
|  |

What buffer do you need to add to your price for cost increases and unexpected costs?

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| --- |
| For example, do you need to plan for increased shipping or material costs, or delayed access to certain products? |
|  |

### What value do you offer?

Does your price reflect the quality of your product?

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|  |

Will your price be competitive?

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**What else could affect your pricing?**

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**What are your competitors charging in that market?**

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**How will you earn revenue?**

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| For example, will you charge fees for transactions or for licences? |
|  |

**How will you set your price?**

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| --- |
| For example, will you add a percentage to your costs, or will you charge what you think your customers will pay? |
|  |

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| --- |
| [Learn about pricing and pricing strategies](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/pricing-strategies/what-should-i-charge-for-my-product-service-in-my-export-market/introduction?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials [How to set the right price](https://www.business.govt.nz/business-performance/marketing-strategy/how-to-set-the-right-price/) — business.govt.nz |

## How will you market your product or service?

Marketing is the co-ordinated process of getting your product or service to your customer. Marketing is crucial especially if you’ll have lots of competition.

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| [Learn about marketing and sales](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/sales-and-marketing?tabIndex=0?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials[Do a self-assessment of your marketing strategy](https://www.business.govt.nz/business-performance/marketing-strategy/marketing-strategy-overview/) — business.govt.nz[Learn how marketing looks at everything from start to finish](https://www.business.govt.nz/how-to-grow/boosting-sales/marketing-and-sales/) — business.govt.nz[Plan and track your marketing activity with our “Marketing Roadmap” template](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fassets.ctfassets.net%2Fpuga2cn07wue%2F32X3tdIWdTM6gwQWyLIuHM%2Fa773e32921ba300f1fa63e50261ca2d2%2FMarketing_Roadmap_Template.xlsx) (XLSX) — Google SheetsOpen the link, select File → Save as → Download a copy |

### Developing your online presence

Your website should be the centre of your brand in your new market.

Is your website easy to use on different screens (eg laptop, tablet and phone)?

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| If your site is hard to read on different devices, customers won’t stay on your site. Search engines will also show your website lower in search results. |
|  |

What digital channels are your customers on?

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| For example, if your customers are on Instagram, you’ll want to be there too. |
|  |

What digital channels in your new market offer two-way communication?

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| --- |
| The best channels let you hear your customers’ joys, pains, frustrations and motivations, and allow you to keep adapting your product or service.  |
|  |

### Selling online

Every business should have at least a basic online presence. Your competitors will, and your customers will expect you to have one too.

You should also have a way for customers to buy your product or service online (unless your distribution agreement does not allow it). You could sell:

* directly — eg on your own website or social media page
* indirectly — eg on a third-party marketplace like Amazon.

Which online option will you use?

|  |
| --- |
| * Basic — your website or social media page, with a way for customers to reach you.
* Mid-level — a website or social media page connected to a third-party e‑commerce platform that can handle orders and customer payments.
* Full service — an online store that automates as much of the sales process as possible. The store should be able to take orders, process payments, update stock in real time and generate reports. It could be on your own website, a third-party e‑commerce platform or social media.
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|  |

### Examining your competitors’ marketing

Investigate how your competitors market themselves.

What works for them? How can you easily differentiate your brand?

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| For example, a New Zealand company in the horticulture technology sector noticed that five of their six competitors used green for their branding. The company realised a different main colour would help them stand out from their competition at trade shows (virtual and in-person) and on their website. |
|  |

## What will your sales process be?

Your sales process is how you take people from just knowing about your brand, to being repeat customers who tell others about you.

If you want to grow your business in an overseas market, write down your sales process. If your process is all in your head, your sales team will find it hard to be consistent.

What is your current sales process? What steps do you take people through on their buying journey?

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| --- |
|  |

Do you need to change anything to get more people to buy? What do you need to do differently?

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| [Learn how to sell in your new market](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/sales-and-marketing/how-to-sell-your-product-in-your-new-market/introduction-how-to-sell-your-product-in-your-new-market?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials[Sales is about place and promotion](https://www.business.govt.nz/how-to-grow/boosting-sales/marketing-and-sales/) — business.govt.nz |

What is the strategy behind your export plan?

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What are your sales goals for your new market?

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What are your long-term revenue goals? Break these down into months and weeks.

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What actions will you take to achieve these goals? What will you do to encourage customers to buy? Consider both your domestic and export markets.

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| [Make your strategic sales plan](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/sales-and-marketing/how-to-sell-your-product-in-your-new-market/make-a-sales-plan-for-your-new-market?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials [Get an introduction to business strategy](https://www.business.govt.nz/business-performance/business-strategy/introduction-to-strategy/) — business.govt.nz [Upskill with Digital Boost, a free online skills programme for businesses](https://digitalboost.business.govt.nz/s/?language=en_NZ) — business.govt.nz |

## How will you distribute your product or service?

A distribution or sales channel is how you reach overseas buyers. The best one for your business depends on what you sell, who your target customers are, how much control you want, and so on.

What distribution channels will you use?

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| --- |
| * Direct — eg sales reps, overseas office, your website, multi-business, sales events
* Hybrid — eg joint venture partnerships, strategic alliance
* Indirect — eg channel partnerships, e‑commerce marketplaces, royalties, licensing, franchising
 |
|  |

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| [Learn about sales channels](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/channels-to-market-export/sales-channels-1/the-big-three?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials |

# Part 5: Think about logistics and compliance

## What export rules do you need to know?

Rules for exporting can be very different between markets. They can change often but you need to keep up, otherwise you may have to pay big penalties.

Rules and regulations (compliance) can include things like:

* product labelling
* customs procedures
* standards
* data privacy.

Write down three compliance requirements you need to meet to export.

|  |
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|  |

List any permits or licences you’ll need to get to export.

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| [Learn why compliance matters](https://my.nzte.govt.nz/essentials/exportessentials/choosing-export-markets/market-validation/compliance/why-compliance-is-crucial?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials[Government agencies can help when you export](https://www.business.govt.nz/how-to-grow/exporting/government-agencies-can-help-when-you-export/) — business.govt.nz |

## Who will your export partners be?

Few exporters enter a new market alone. Partnering with a company that’s already in the market allows you to learn from them, and might make it easier for you to borrow.

Your partnership could be a joint venture or strategic alliance. Or you could partner with people like:

* agents
* consultants
* distributors
* retailers
* systems integrators
* value-added resellers.

Do you have any current partners?

|  |
| --- |
|  |

Who do you plan on partnering with?

|  |
| --- |
|  |

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| --- |
| [Learn how to find a partner](https://my.nzte.govt.nz/essentials/exportessentials/market-entry/channels-to-market-export/finding-a-partner/introduction-finding-a-partner?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — Export Essentials [Learn different ways to ship and distribute](https://www.business.govt.nz/how-to-grow/exporting/different-ways-to-ship-and-distribute/) — business.govt.nz[Find out how to choose a partner](https://my.nzte.govt.nz/article2/how-to-choose-an-in-market-partner?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE[Download a distribution agreement template](https://my.nzte.govt.nz/article2/distribution-agreement-template?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE |

# Part 6: Protect your intellectual property

Intellectual property (IP) typically includes things like a logo, brand, trade secret, design or invention.

What IP do you have? How will you stop someone from copying it?

|  |  |
| --- | --- |
| **Problem or conflict source** | For example, you have an original idea that someone could copy. |
| **Solution** | If you share your idea with anyone, even within your business, you could have them sign a non-disclosure agreement. |

|  |  |
| --- | --- |
| **Problem or conflict source** |  |
| **Solution** |  |

|  |  |
| --- | --- |
| **Problem or conflict source** |  |
| **Solution** |  |

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| [Think about intellectual property if you export a service](https://www.business.govt.nz/how-to-grow/exporting/create-a-good-export-plan/) — business.govt.nz[Learn what intellectual property is](https://www.business.govt.nz/risks-and-operations/intellectual-property-protection/what-is-intellectual-property/) — business.govt.nz[Learn about intellectual property protection for exporters](https://my.nzte.govt.nz/article2/intellectual-property-protection-for-exporters?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE[Find out three things to consider about Māori IP](https://my.nzte.govt.nz/article2/3-things-to-consider-about-maori-ip?utm_source=MBIE&utm_campaign=mbie_export_plan_template&utm_medium=partners) — myNZTE |