# export.business.gov.au

## Export Plan template

A good export plan can help you to define the direction of your business, create strategies to achieve your goals and get the support you’ll need to grow the business sustainably in the long term. This template steps you through the process of creating a solid, well-structured plan tailored to your business.

## Using this template

Before you complete this business plan template and start using it, consider the following:

1. **The Export Plan builds on the key fundamentals of your Business Plan.** If you don’t have a Business Plan, you need to go through this process first to consider if your business is ready and capable of tackling more complex markets offshore.
2. **Do your research.** You will need to make quite a few decisions about your business including structure, marketing strategies and finances before you can complete the template. By having the right information to hand you also can be more accurate in your forecasts and analysis.
3. **Determine who the plan is for.** Does it have more than one purpose? Will it be used internally or will third parties be involved? Deciding the purpose of the plan can help you target your answers. If third parties are involved, what is their level of interest and how much information is your business willing to share?
4. **Do not attempt to fill in the template from start to finish.** First decide which sections are relevant for your business and set aside the sections that don’t apply. You can always go back to the other sections later.
5. **Use the [*italicised text*].** The italicised text is there to help guide you by providing some more detailed questions you may like to answer when preparing your response. ***Please note:*** If a question does not apply to your circumstances it can be ignored.
6. **Get some help.** If you aren’t confident in completing the plan yourself, you can enlist the help of a professional (i.e. [export adviser](https://www.austrade.gov.au/Australian/How-Austrade-can-help/Trade-services/TradeStart), [business adviser](https://business.gov.au/expertise-and-advice) or accountant) to look through your plan and provide you with advice.
7. **Actual vs. expected figures.** Existing exporters can include actual figures in the plan, but if your business is just starting out and you are using expected figures for turnover and finances you will need to clearly show that these are expected figures or estimates.
8. **Write your summary last. Be succinct and use dot points.** You want to get to the point but not overlook important facts. This is your opportunity to sell yourself to prospective banks, investors, partners or wholesalers. They should be able to quickly read your plan, find it realistic and be motivated by what they read.
9. **Review. Review. Review.** Your export plan is there to make a good impression. Errors will only detract from your professional image. So ask a number of impartial people to proofread your final plan.

**[*INSERT YOUR BUSINESS LOGO*]**

[*Your Name*]

[*Your Title*]

[*Business Name*]

[*Main Business Address*]

**ABN:** [*ABN*]

**ACN:** [*ACN*]

[*Business Name*]

Export Plan

**Plan history:** *Your plan is a “living document”. Use it to seek input from relevant areas of your business. Use this section to keep track of who has reviewed and made changes to the plan.*

|  |  |  |
| --- | --- | --- |
| **Date** | **Summary of changes** | **Author** |
| *[Insert date]* | *[Insert summary of changes e.g. Initial draft]* | *[Insert name and role e.g. Mai Jones, Marketing Manager]* |
| *[Insert date]* | *[Insert summary of changes e.g. Updated market section to include recent research]* | *[Insert name and role e.g. Mai Jones, Marketing Manager]* |
| *[Insert date]* | *[Insert summary of changes e.g. Updated finance section]* | *[Insert name and role e.g. John Lee, Chief Finance Officer]* |

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## Export Plan Summary

**[*Please complete this page last*]**

### Executive Summary

This should be a maximum of half a page.

The key issues to address in this section are the company’s reasons for exporting and your overall objectives in entering overseas markets.

Objectives you could include:

* spreading market risk
* increasing production volumes
* lowering unit costs
* improving brand image or profits.

### Export Capability

**Date established:** *Insert the date you started trading.*

**Relevant experience:** *Briefly outline your experience and/or years in the industry and any major achievements/awards.*

**Products/services:** *What products/services are you selling? What is the anticipated demand for your products/services in export markets?*

**Unique selling proposition**: *How will your products/services succeed in the market where others may have failed? What gives your products/services the edge?*

**Production/service potential:** *How much of the company’s current production/service potential is currently utilised?*

**Laws and regulations:** *List all the licences or permits you have registered or will need to comply with to export your goods and services*

###

## Risk management

List the potential risks (in order of likelihood) that could impact your business.

|  |
| --- |
| Check out our guide on [Export benefits and risks](https://www.export.business.gov.au/get-started-with-exporting/export-benefits-and-risks) to make sure you’ve got the common risks covered below. |

| Risk*Description of the risk and the potential impact to your business. E.g. Country risk political instability* | Likelihood*Highly Unlikely, Unlikely, Likely, Highly Likely* | Impact*High, Medium, Low* | Strategy*What actions will you take to minimise/mitigate the potential risk to your business?* |
| --- | --- | --- | --- |
| Not doing enough research to fully understand market access, registration and regulatory hurdles |  |  |  |
| Not protecting your intellectual property in each individual market |  |  |  |
| Not taking enough time to qualify potential business partners and ensure they offer the best channels to market or support to grow your brand |  |  |  |
| Not doing enough research to understand local cultural or regulatory requirements (ie. branding, ingredients, labelling) |  |  |  |
| Quoting incorrect inco-terms |  |  |  |
| Long and more complex payment terms (ie. Letters of credit, credit terms, post shipment payments) or the risks associated with not getting paid |  |  |  |
| Freight and logistics risks, including not obtaining correct documentation or approvals prior to shipment and having the goods stopped or refused at customs port of entry |  |  |  |
| *Add more here* |  |  |  |
| *Add more here*  |  |  |  |

### S.W.O.T. analysis

List each of your businesses strengths, weaknesses, opportunities or threats in the table below and then outline how you plan to address each of the weaknesses/threats.

| Strengths | Weaknesses |
| --- | --- |
| *e.g* *Advantage**Capabilities**Assets, people**Experience**Financial reserves**Value proposition**Price, value, quality* | *e.g.* *Disadvantages**Gap in capabilities* *Cash flow* *Suppliers**Experience* *Areas to improve**Causes of lost sales* |

| Opportunities | Threats |
| --- | --- |
| *e.g* *Areas to improve* *New segments**Competitor weakness**Industry trends**New products**New innovations**Key partnerships* | *e.g* *Economic movement* *Obstacles faced**Competitor actions**Political impacts**Environmental effects**Loss of key staff**Market demand* |

## The Market

### Market Analysis

|  |
| --- |
| Read our [Tips for choosing export markets](https://export.business.gov.au/find-markets-and-buyers/tips-for-choosing-export-markets).Use our [Find markets search tool](https://www.export.business.gov.au/find-export-markets/market-search-tool) to find market trends and insights on high performing markets for your products. |

**Market size**

* What is the size of the market?

**Market trends**

* What recent trends have emerged in the market? Is there a growth in GDP, gaps in the market, a decline in a competitor's market share, changes to legislation or market access, free trade agreement benefits?
* What does the competitive landscape look like?

**Anticipated demand and growth potential**

* What growth potential is available? What is the anticipated percentage growth of the product in the future?
* What will drive this growth? What support mechanisms do you need to have in place (e.g. supply capacity, staffing, cashflow)?
* Are there favourable seasonal variations?
* Is there a large key demographic that aligns with your brand?
* What is the anticipated quantity of products/services your customers are likely to purchase? For example, how much will an individual customer buy in 6 months or 12 months?

**Ease of access**

* What is the ease or difficulty in operating in that market (high level restrictions or an open economy)?

*List the legislation which will have some impact on the running of your export business. For example: international laws, consumer law, business law, or specific legislation to your industry or market.*

|  |
| --- |
| Find out more about [laws and regulations](https://export.business.gov.au/laws-and-regulations) you need to consider when exporting. Do our [Check market access](https://www.export.business.gov.au/find-export-markets/check-market-access) tutorial. |

### Competitor analysis

|  |
| --- |
| Use our [markets search tool](https://www.export.business.gov.au/find-export-markets/market-search-tool) to find competitive environment information. Do our [Competitor Analysis tutorial](https://www.export.business.gov.au/find-export-markets/competitor-analysis) and fill in the table below.  |

**Competitor details**

How do you rate against your competitors? How can you improve your offer? List at least 3 competitors in the table below by market.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Competitor 1**Add competitor name | **Competitor 2**Add competitor name | **Competitor 3**Add competitor name | **My competitive advantage** |
| **Size** |  |  |  |  |
| **Growth** |  |  |  |  |
| **Market share**  |  |  |  |  |
| **Ownership and leadership** *e.g. Are they owned by a multi-national?*  |  |  |  |  |
| **Product** *include key features* |  |  |  |  |
| **Price** |  |  |  |  |
| **Place** *How do they distribute their product? Where do customers buy products like yours?* |  |  |  |  |
| **Promotion***How do they promote their products?* |  |  |  |  |

### Products/services suitable for export

|  |  |  |  |
| --- | --- | --- | --- |
| Product/Service | Description | Modifications required | Price |
| *Product/ service name* | *Brief product/service description* | *Include changes required to make it suitable for export* *(ie. labelling, packaging sizes, ingredients)* | *Include the price* |
|  |  |  |  |
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### Market position

*Provide positioning for each target market.*

* Where do your products/services fit in the market? Be realistic in your assessment of whether your products are premium, mid-tier or mass market.
* How does this compare to your competitors?

Your market position in overseas markets may not be the same as it is in Australia and may not be the same even in each export market. A mass market product in Australia may be priced at the higher end of the market overseas once you factor in import duties, freight, unique regional inputs and the number of channel partners required to get your product to the end customer.

### Unique selling proposition (USP)

*Outline your USP*

* How will your products/services succeed in the market where others may have failed?
* What gives your products/services the edge?
* Do you offer value added services that your competitors don’t?

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| Check out our [Unique selling proposition tutorial](https://www.export.business.gov.au/get-started-with-exporting/develop-your-unique-selling-proposition) to create a compelling USP. |

### Export pricing strategy

Never offer export pricing without understanding all the costs associated with getting that product to your end buyer in market. You need to fully research the distribution channels, marketing requirements, warehousing, registration, regulation, Inco-terms and market access costs so you can factor them into your export pricing. This is where many businesses underestimate the cost, complexity and expectations from each party of getting a product into the market.

|  |
| --- |
| Do our [Export pricing tutorial](https://www.export.business.gov.au/pricing-costs-and-finance/set-your-export-pricing) to work out your pricing strategy. |

## Your channel strategy

### Key customers

Identify your key customers via the market channels. This is likely to be in the form of a wholesaler, distributor, agent, broker, franchisee, licensee or direct to consumer depending on your business model and the local market requirements.

Some businesses also sell across vertical channels so they need to identify each of those channels along with the end user which might be significantly different across industry sectors.

|  |
| --- |
| Check out our [Channels to market](https://www.export.business.gov.au/find-export-markets/channels-to-market) guide and to learn how to find customers through agents, distributers, trade shows, selling online and more. |

### Sales & distribution channels

Consider vertical channels for your products in new markets. Especially if your product has multiple applications.

You might be able to work with multiple partners based on those market channels under exclusivity agreements without any crossover thereby expanding your customer base exponentially.

For example, you might be producing a paint product that can be used in mining, automotive and industrial applications. Your key market channels could be mining companies, hardware outlets and automotive distributors.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Channel type | Products/services | % of sales  | Advantages | Disadvantages |
| *e.g. Shopfront, internet, direct mail, export or wholesale* | *List all the products/services sold via this channel* | *What % of overall sales do you expect to sell via this channel?* | *What advantages are there of using this channel for these products?* | *What challenges do you expect to face using this channel? How will you overcome them?* |
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### Advertising & promotion plan

* What strategies do you have for promoting and advertising your products/services in the next 12 months?
* Do you need to modify your marketing materials to suit international markets?

This can be difficult to anticipate for export markets if you are new to exporting. If you have a detailed domestic marketing and promotional strategy, use it to discuss what activities you could replicate in overseas markets.

Then you can plan out a calendar of events with your channel partners and allocate suitable resources to support these activities. As you enter new markets it will help you to plan out both your domestic and export strategies along with resources and costs.

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| --- | --- | --- | --- |
| Promotion/advertising type | Expected business improvement | Cost ($) | Target date |
| *Print media advertising, online advertising, trade show, mail-out, giveaway, media release, social media campaign or event.* | *How do you expect it will improve your business success?* | *$* | *Month/**Year* |
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## Management and implementation plan

*Outline your business structure in an organisation chart and who will be responsible for managing and overseeing the development and implementation of the export strategy.*

Figure 1: Example Organisation Chart.



### Details of management & ownership of the export activities for the business:

* Who will be running the export business?
* How will senior management and areas of the business help implement the export plan? Outline their role in the business, the strengths of each employee involved in the export side of your business.

**Experience:**

* What experience do the business owners and key personnel have at exporting?
* How many years have they owned or run a business? List any previous businesses owned/managed.
* List any major achievements/awards.
* What other relevant experience do you have?

Ensure that the business has key management and stakeholder support to undertake export activities. This includes dedicated staff for business development, sales and operational activities for export.

List out current staff with relevant qualifications and the percentage of time allocated to export activities. If current staff are not adequately skilled then training program will be required.

### Training and support

* Do you need to travel to provide face to face training for sales staff?
* Have you factored in these costs or can this be delivered online?
* Have you checked your eligibility for the [Export Market Development Grant](https://www.austrade.gov.au/Australian/Export/Export-Grants/About/what-is-emdg) to help with these costs?

|  |
| --- |
| Check out [Get exporting training](https://www.export.business.gov.au/get-started-with-exporting/get-export-training) to build your skills. |

### Suppliers

*Provide details of your main suppliers that are critical to your export business.*

* Who are your main suppliers?
* What do they supply to your business?
* Will they be able to meet your requirements as your business grows?
* If not, have you sourced alternative suppliers to fill the gap?
* Does the supplier have right accreditations to meet international market standards where needed?
* Are they reliable and consistent on quality standards and lead times?
* Is their pricing competitive especially with economies of scale?
* How will you maintain a good relationship with them?

### Production capacity

*Provide details of your spare production capacity including any seasonal fluctuations and lead times required.*

This will form a basis for important discussions with potential customers or partners and help you ensure you can deliver on orders and expectations.

If you have low levels of spare capacity:

* address how you plan to increase capacity to meet potential sales
* ask your partners for 12-month forecasts to help with outsourcing production, increasing plant and equipment, or
* seek funding to support expansion.

Waiting until you receive an order is likely too late to consider these issues.

### Freight and logistics

*Provide details of how you will get the goods to the buyer.*

* Will the goods be shipped via air or sea?
* Are there any cold chain requirements or special shipping requirements (e.g. perishable goods)?
* Have you checked the stability of your goods in high or humid temperatures?
* Do you need any special export documentation to accompany the goods (ie. certificates of origin – preferential or non-preferential, certificates of free sale, certificates of manufacture, carnets, organic certifications)?
* Does the partner have their own freight forwarding agent that they work with or do you need to find one for yourself?
* Is any special packaging needed to meet export requirements (e.g. ISPM-15 accredited export pallets or crates)?
* Do you need to invest in more heavy-duty packaging to avoid damage in transit?
* Have you discussed Incoterms with the buyer and do you understand your obligations associated with the agreed terms?

|  |
| --- |
| Check out [Contracts and shipping](https://www.export.business.gov.au/contracts-and-shipping) for help. |

### Payment types accepted

*Provide details of the payment types you’ll accept.*

* Will you accept prepayment pre-shipment through electronic bank transfers (TT), Escrow, Paypal; Documentary Letters of Credit; Documentary Sight Collections; Documentary Term Collections, Payment Post-Shipment Delivery?

|  |
| --- |
| Do our tutorial to [Set up payment methods](https://www.export.business.gov.au/pricing-costs-and-finance/export-payment-methods) for exporting  |

### Warranties & refunds

*Describe your warranties and refunds policy and process.*

* If you manufacture certain goods, what are the warranty terms?
* What is your refund/exchange policy?
* What is the refund policy for the retailer and is there specific country legislation the manufacturer is required to meet with regards to consumer rights?
* Have you factored this into your export pricing model?

### Research & development (R&D)/innovation activities

*Describe the R&D and innovation activities you’ll implement enable successful exporting.*

* Do you need to improve your production processes?
* What financial and/or staff resources will you allocate?
* Do you need to re-develop your products to meet offshore requirements?
* Have you checked if you are eligible for the [R&D Tax Incentive](https://www.business.gov.au/Grants-and-Programs/Research-and-Development-Tax-Incentive)?

### Intellectual property strategy

*Describe your IP strategy for exporting.*

* How do you plan to protect your innovations and brand?
* Do you have non-disclosure or confidentiality agreements in place?

List any current trademarks, patents, designs and websites (domain names) you have registered and for which international markets.

### Insurance

|  |  |
| --- | --- |
| Professional indemnity | *Provide details.* *This covers any legal action taken out as a result of your professional advice* |
| Product liability | *Provide details.* *This covers any legal action taken out as a result of injury, damage or death from your product. Always check that your policy covers new markets that you enter and seek out other insurance providers if they don’t cover those international markets. Some larger retailers also have a requirement for a specified level of cover so make sure you check this when signing contracts.* |
| Business assets | *Provide details if you have insured your business assets in the event of a fire, burglary or damage? For example: building, contents, motor vehicles.* |
| Business revenue | *Provide details if you have insured your business in the event of business interruption where you cannot trade because of a particular event and are unable to make money?* |

## The Finances

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| Read our [Export costs](https://www.export.business.gov.au/pricing-costs-and-finance/export-costs) and [finance](https://www.export.business.gov.au/pricing-costs-and-finance/export-finance) guide to understand your expenses and find out how to access grants, loans and other finance to help you get started with exporting. |

### Key objectives & financial review

**Financial objectives**

*List your key financial objectives.*

*These can be in the form of sales or profit targets. You could also list your main financial management goals such as cost reduction targets.*

**Finance required**

* How much upfront money do you need?
* Where will you get the funds?
* What portion will you be seeking from loans, investors, business partners, friends or relatives, venture capital or government funding?
* How much of your own money are you contributing towards the business?
* When applying for bank loans and government grants, you’ll need to work closely with an accountant to supply financial statements to support your application. Most government grants will require the last three years of standard accountant prepared Profit & Loss and Balance Sheet statements.

## Supporting documentation

Attached is my supporting documentation in relation to this export plan. The attached documents include:

* *List all of your attachments here. These may include resumes, inventory list, survey/questionnaire and/or financial documents.*
* *Export costs spreadsheet*
* *Export pricing spreadsheet*
* *Balance Sheet*
* *Profit & Loss Statement*
* *Break even analysis*

|  |
| --- |
| You can find templates and instructions in our [Export pricing tutorial](https://export.business.gov.au/pricing-costs-and-finance/check-your-export-pricing).  |