

Handout 1

Export readiness checklist

To test whether an Indonesian firm is ready to export, answer the following questions and then check the score:

GENERAL

1. Is the Indonesian firm's product or service already available? (Please select A, B or C)
A. Currently in production ____
B. At the prototype stage ____
C. At the idea stage only ____

2. Is the Indonesian firm's product or service currently being sold in Indonesia? (Please select A, B or C)
A. Currently selling, and market share is growing ____
B. Currently selling, but market share is low ____
C. Currently selling, but in only one city ____

3. Does the Indonesian firm have surplus production capacity or available specialists to meet increased demand for its product or service from other countries?
Yes____ No____

4. Does the Indonesian firm have the financing required to adapt its product or service to suit the target market and to promote it? (Please select A, B or C)
A. Financing is in place ____
B. Financing is being arranged ____
C. No financing is available ____

ABOUT THE FIRM

5. Is the Indonesian firm's management committed to sustaining its export effort?
Yes____ No____

6. Does the Indonesian firm have a good track record of meeting deadlines?
Yes____ No____

7. Does the Indonesian firm's management have experience in export markets?
Yes____ No____

ABOUT THE PRODUCT OR SERVICE

8. Does the Indonesian firm's product or service have a distinct competitive advantage (quality, price, uniqueness, innovation) over its competition?
Yes____ No____

9. Has the Indonesian firm adapted its packaging, labelling and/or promotional materials for the Canadian market?
Yes____ No____

10. Does the Indonesian firm have the capacity and resources to provide after-sales support and service in Canada?
Yes____ No____

11. Does the Indonesian firm have a Free on Board (FOB) or Cost, Insurance and Freight (CIF) price list for its product, or a rate list for its service?
Yes____ No____

12. Has the Indonesian firm undertaken any Canadian market research? (Please select A, B or C)
A. Completed primary and secondary market research, including a visit to Canada ____
B. Completed some primary and secondary market research ____
C. Completed no research____

13. Is the Indonesian firm's promotional material available in French and/or English? (Business cards, brochures, and website?)
Yes____ No____

14. Has the Indonesian firm started marketing your product or service in Canada?
Yes____ No____

15. Has the Indonesian firm engaged the services of a sales representative/distributor/agent or broker?
Yes____ No____

16. Has the Indonesian firm hired a freight forwarder or customs broker?
Yes____ No____

INTERPRETING THE SCORE

If the responses were "A" and/or "Yes" to a combined total of more than 12 of the questions, congratulations! The Indonesian firm understands the commitment, strategies and resources needed to be a successful exporter. At the very least, the firm has the foundation in place to consider exporting to Canada.

7 – 11: The Indonesian firm is not ready to export. It is on the right track, but there seem to be areas of weakness in its export strategy. It may be wise to seek advice and guidance from the IETC to consult with one of their trainers. It is also recommended to read through this step-by-step guide to get a better idea of what will be involved if the firm decides to export to Canada.

Less than 7: The Indonesian firm is not ready to export at all. It will definitely need to do more research and preparation before it exports to Canada. It would be wise to seek advice and guidance from the IETC to consult with one of their trainers. It is also recommended to read through this step-by-step guide to get a better idea of what will be involved if the firm decides to export to Canada.

Handout 2

The Elements of an Export Plan

An Export Plan should contain the following sections:

1. Executive Summary

The Executive Summary is usually written after the rest of the plan has been completed and is basically a 1 to 2-page summary of each element, including a summary of expectations and resources required, and recommendations for next steps.

2. Introduction

The Introduction provides the background for the Export Plan. It should include the overall purpose of the Export Plan, summarize the history and rationale for introducing the Indonesian firm to the Canadian market, and provide an overview of its export objectives and goals.

- Business history (all aspects: including sales, profits, etc.)
- Vision and mission statement
- Domestic market performance
- Organizational goals and objectives
- Purpose of the Export Plan
- Target market (Canada)
- Canadian market goals
- Short and medium-term objectives for exporting
- Location and facilities

3. Firm Overview

This provides a clear and concise description of the Indonesian firm, including history, vision and the value it brings to its customers. This section should incorporate highlights of the SWOT Analysis and include the reasons the firm is considering exporting as well as an assessment of its readiness to consider the Canadian market. It should also include a list and description of its management team and a comment on how it might fill any gaps in expertise required for exporting to Canada.

- Ownership of the firm
- Organizational structure
- Value proposition
- SWOT analysis
- Description of management team
- Staffing
- Level of commitment by senior management
- Relationship between exporting and other operations
- Experience and expertise in exporting
- Strategic alliances
- Export Team – skills and experience
- Labour market issues

In describing the ownership, management team and general staffing, the Indonesian firm should record and track the gender profile of the firm; i.e., is it owned by women, managed by women and/or is a large portion of the employees women (if yes then what are the percentages)? Under labour market issues, commitment to good labor practices (e.g., no child labour, safe working conditions, living wage, overtime, holidays, rights of representation) should be recorded and tracked.

4. Product or Service

This provides a clear description of the Indonesian firm's export product or service, its unique selling points and how marketable it might be in Canada. Will the products or services need to be modified for the Canadian market? What are the Indonesian firm's competitive advantages and how will it differentiate itself?

- Description of products and services
- Key product/service features and benefits
- Other features (intellectual property, after sales, seasonality, shelf life and other life cycle issues, etc.)
- Adaptation and redesign required for exporting to Canada
- Production of products and services (including capacity issues, etc.)
- Quality assurance or certification requirements
- Product regulations in Canada
- Future products and services (new product Research and Development, etc.)
- Comparative advantage in production/product (advantageous selling attributes, etc.)

5. Export Objectives and Goals

This describes what the Indonesian firm expects to achieve by entering the Canadian export market within a certain timeframe, say within one year and within five years. The firm should describe the goals and objectives of exporting as compared to their overall/general objectives and may also wish to track export growth as percentage of their overall sales (compare to domestic sales).

6. Canadian Market Overview

Provides the results of the Indonesian firm's Canadian market research, including a description of the Canadian market in terms of size and trends, key economic, social, political and cultural characteristics, a profile of the target customer, buying patterns, and factors influencing purchasing decisions.

- Market research
- Political and legal environment
- Economic environment
- Size of market
- Key market segments & demographics
- Industry trends and other market factors
- Purchasing process and buying criteria (distribution and promotion channels: direct customers to end-users)
- Logistics (transportation and infrastructure issues)
- Description of industry participants/ industry profile
- Market share held by imports
- Tariff and non-tariff barriers (licenses, quotas, fees, documentation)
- Industry trends and other market factors (e.g. cultural, social, business practices)
- Market outlook (buyer analysis and projected demand for the product or service)

7. Market entry strategies (based mainly on issues of the Marketing Plan)

This analyzes the competitiveness of the Indonesian firm's product or service. This will help to position it effectively in the Canadian market, and to decide pricing and marketing strategies. It contains objectives in terms of market share, revenue and profit expectations and indicates the position the firm would like to occupy in the target market and explain how it will go about achieving that position.

- Identification of key target market segment(s) in Canada
- Description of key competitors and analysis of how they are marketing themselves
- Analysis of competitive position
- Product for export market (modifications, adaptations, etc.)
 - Competitive advantage – will you compete on price, design, uniqueness, quality, other?
 - Seasonality and life span issues, design, styles, etc.
 - Standards, quality controls, packaging, labelling, language issues
 - Intellectual property considerations

- Pricing strategy
 - Export pricing/costing
 - Current market pricing
 - Market constraints on price points for entry
- Promotion & sales strategy
 - Trade events and missions
 - In-market (point of sale, in store, etc.)
 - Advertising (media, etc.)
 - Development of sales leads
- Terms of sale
- Placement/distribution strategy
 - Description of intermediaries and partners
 - Strategic alliances (cooperation, joint ventures, licensing, franchising etc.) if applicable
 - After-sales servicing (returns, warranties, etc.)

8. Regulatory and logistical Issues

As a G7 country, Canada is governed by a strong regulatory framework, including laws that regulate international business with Canada. In addition, being part of the North American continent (but in many ways different than the U.S.) and having the second largest landmass in the world, logistics play a very crucial part for Indonesian exports to Canada. The following are the points that should be considered in this section:

- Intellectual and property protection
- International legal and regulatory issues
- Other legal and regulatory issues
- Timelines (from production to delivery)
- Use of trade service providers: Intermediaries such as customs brokers and freight forwarders
- Modes of transportation (including special needs such as refrigeration, etc.)
- Cargo and related insurance
- Inventory control and warehousing
- Trade documentation (customs, inspections, certification of origin, safety, health, packaging, etc.)

9. Risk factors

All Indonesian firms deal with risks in operating a business locally and these risks increase when they decide to venture into exports. However, as discussed earlier, the benefits of exporting will outweigh the costs if and only if the Indonesian firms can identify and manage the following risks:

- Market risks (Foreign and domestic)
 - Economy, political, social situation
 - Demand in Canada
 - Product Standards/certification
- Commercial
 - Partners, clients, credit
 - Payment Issues: Contracts, Credit
 - Dispute Resolution
 - Currency
- Internal Risks (your company stability, staffing, expertise, etc.)
- Political and other risks

10. Implementation Plan

This includes a list of all the key activities that need to be undertaken to achieve the Indonesian firm's export objectives. For each activity, it should indicate target dates and who will perform the activity. It should also include a design to evaluate the Export Plan at different stages to determine if the Indonesian firm's goals are being achieved and what modifications, if any, may be needed.

- Key activities and milestones
- Roles of various parties
- Timeline for completing tasks
- Monitoring and evaluation criteria and process (including the methods to be used to track and measure the firm's progress in the market)
- Financial Plan**
 - Revenues or sources of funding
 - Operating budget
 - Cost of sales
 - Marketing and promotional costs
 - Other expenses or expenditures

Handout 3

Conducting Market Research

How to get the most useful information from interviews:

The Indonesian firm must state its objectives at the outset and present its questions clearly. For example:

Firm Description – Brief description of the firm, its history, industries/markets served, professional affiliations (if any), and its product or service.

Objectives – Brief list of one or more objectives for the firm's planned exports (product or service) to Canada, based on its secondary market research.

Product or service – Clear description of the product or service the firm wants to export to Canada.

Questions – Questions based on the firm's secondary research (as specific as possible).

Remember: To ensure better response, careful research of the subject is needed.

Here is an example of how an Indonesian exporter of coconut oil might structure a phone interview with the Indonesian Trade Office in Ottawa, Canada.

Company Description – Our women-owned company has been a supplier of virgin coconut oil, organic coconut palm sugar, and arenga sugar from Indonesia since 2008. We have been exporting to the United States and Malaysia since 2013 and did \$45,000 USD in export sales in 2015. We are currently certified HACCP, USFDA, Organic, and Kosher.

Objectives – We are interested in exporting to Canada as our research shows that Canadians are interested in organic and responsibly sourced products that also have health benefits. Our goal is to target Canadian buyers in the food and cosmetics industry and to begin exporting within 12 months.

Product or service – The products we are specifically interested in exporting are virgin coconut oil and organic coconut palm sugar. Our products are of very high quality, sustainably sourced, and are suitable for human consumption or for beauty and health products. An important selling point is our fair trade relationship with farm families.

Sample Question – Through our research, we understand there is a major food tradeshow that is held every year in Canada called SIAL. We have visited the tradeshow website and it looks like there is a good fit for our products, so we have decided to send a representative from our company to participate in the SIAL show next year. We would like to set up meetings with potential Canadian agri-food buyers. Who can help us with this?

Possible Sources of Market Information

<ul style="list-style-type: none">-Competitors' websites-Potential customer websites-Commercial banks-Internet search engines, discussion boards-Online and offline commercial databases and subscription services-Conference Board of Canada and TFO Canada websites and Market Information Papers (MIPs)-Trade and business associations	<ul style="list-style-type: none">-Indonesian Trade Office in Canada-Canadian embassy in Indonesia-Exploratory mission to Canada-Attending or participating in trade shows-Other Indonesian firms exporting to Canada-DGNER, IETC, KADIN, ICCC websites
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Handout 4

Canadian Market Research Checklist

Helps identify what a firm should know about the Canadian market.

Canadian Political highlights

- The Canadian government
- Who's who
- Canadian relations with Indonesia, including agreements

Canadian Economic highlights

- The Canadian economy and trends
- General imports and exports
- Imports and exports to and from Indonesia
- Canadian imports for the firm's specific product or service

Consumer Trends

- General
- Specific for the sector
- Environment, gender and social responsibility

Business Information

- The currency
- The language(s)
- Business practices and regulations
- Differences in legal framework
- Work relationships
- Office hours and holidays

Partnering options

- Indonesian companies doing business in Canada
- Major companies from Canada doing business in Indonesia
- Options for local partners

Support for market-entry strategies

- Industry associations
- Trade events in Canada
- Other networking options
- Trade media
- Research facilities
- Market research sources

Cultural considerations

- Greetings and forms of address
- Do's and don'ts
- Cultural differences

Travel tips

- Visa, work permits or other requirements
- Business support services
- Travel arrangements
- Electrical voltage
- Others

Handout 4A

Standards

Standards for practices, technical requirements and product specifications are increasingly important in global trade. In Canada, importers are legally liable for defective products. To ensure high and consistent quality, Indonesian exporters to Canada must meet relevant Canadian and/or international standards.



International Standards

Indonesian exporters can familiarize themselves with international standards and apply for certification of their products through adherence to the [International Standards Association](#) (ISO) codes.

Example: Clothing exports to Canada must meet minimum standards based on factors such as flammability, durability and strength. In many cases, buyers also have their own specifications for imported items – this could include that clothing be colour-fast, pre-shrunk, sanitized, stain resistant, etc. Careful attention should be paid to overall workmanship and the quality of detailing.



Canadian Standards

The [Standards Council of Canada](#) (SCC) is the government body responsible for developing and promoting standardization in Canada. Canada has four accredited Standards Development Organizations, which develop standards through stakeholder committee and can submit new standards to the SCC to be recognized as National Standards of Canada.

- [Canadian Standards Association](#)
- [Underwriters Laboratories of Canada](#)
- [Canadian General Standards Board](#)
- [Bureau de Normalisation du Québec](#)

These organizations develop four types of standards:

- **Performance Standards:** Set based on simulating the performance of a product under actual service conditions. Commonly used in food safety, fuel economy, and design of packaging for transporting hazardous goods.
- **Prescriptive Standards:** Identify product characteristics such as material thickness, type and dimension. Commonly used for furniture, industrial materials, etc.
- **Design Standards:** Identify specific design or technical characteristics of a product.
- **Management Standards:** Set out standards for quality and environmental management system processes.

Assessment to monitor and verify compliance with standards in Canada is achieved at three levels:

1. **Certification Organizations (COs):** Conduct on-site audits, take samples, and test products and services in order to issue CO marks attesting that they conform to the standards.
2. **Testing Organizations:** Perform tests according to recognized procedures and document their findings as to whether the product or service meets the appropriate standard.
3. **Management Systems Registrars:** Issue certificates to companies meeting ISO standards.

Indonesian exporters should visit the websites of Canada's standards development organizations to find out about current Canadian standards for their products, as well as certification and accreditation programs.

Handout 5

Pricing checklist

The checklist below can be used to track costs and determine the price of your product in the Canadian market. The space on the right is for making notes about any action items which may be required.

Sample of an Export Costing Worksheet	
ITEM	COST (Indonesian Rupiah)
1. Product cost per unit	
Materials	
Labour	
Factory overhead	
Administration	
Product modification and regulatory approval	
Export administration costs	
Advertising/promotional material	
Total Product Cost	
2. Export cost	
Crating	
Special labelling and packing charges	
Marking charges	
Loading and strapping charges	
Forwarding: <ul style="list-style-type: none"> • documentation • product insurance 	
Sub-total, export cost	
Add targeted profit	
Basic Selling Price	
Add agents commission (if applicable)	
Ex-works Sales Price	
3. Export shipping cost	
Inland freight	
Wharfage charge	
Total (f.o.b. port)	
Add: <ol style="list-style-type: none"> 1. air freight 2. marine freight 3. insurance 	
Total c.i.f. at port of entry	
4. Convert to Canadian dollar at current exchange rate (show rate)	Canadian \$

Handout 6

Reviewing Marketing Tools for the Canadian Market

Below is a list of marketing tools that may be used for the Canadian market. Please note that not all of them will be appropriate for all businesses. An Indonesian firm should go through the list of marketing tools and circle either yes (Y) or no (N) to determine whether or not the tools are adequate for marketing in Canada. It should also circle its response below, and indicate the priority of having this tool (H=High, M=Medium, L=Low)

Marketing Tool	Desired Impression	Are Yours...?	Yes	No	Priority H M L
Business Cards	Quality and excellence	distinctive and high quality	Y	N	H M L
		informative	Y	N	H M L
		in appropriate language(s)	Y	N	H M L
		including area codes, country, e-mail and website	Y	N	H M L
Website	Leading edge	professional looking and informative	Y	N	H M L
		updated regularly	Y	N	H M L
		including an email response option	Y	N	H M L
		including an on-line purchase option if appropriate	Y	N	H M L
Customer Testimonials	Company is highly recommended	representative	Y	N	H M L
		from top executives	Y	N	H M L
		included in brochure	Y	N	H M L
Brochures	World class	highlighting your uniqueness and relevance to target market	Y	N	H M L
		highlighting socially responsible aspects if they are a selling point	Y	N	H M L
		informative in appropriate language(s)	Y	N	H M L
		professionally printed and graphically pleasing	Y	N	H M L
Media Pieces	Company is a recognized leader	quoted in brochure	Y	N	H M L
		reproduced on letterhead	Y	N	H M L
		displayed in office, mailed out and on website	Y	N	H M L
Videos	Informative	professionally produced	Y	N	H M L
		describing features and benefits for your client	Y	N	H M L
Exhibits	Inviting and informative	professionally designed	Y	N	H M L
		designed to capture attention	Y	N	H M L
		easily conveying the main message	Y	N	H M L
		encouraging visitors to stop and obtain more information	Y	N	H M L
			Y	N	H M L

Handout 7

5 Ps Checklist

Please go through the following checklist for the five Ps of marketing to build out your Canadian marketing strategy. Make sure you document it all in your Export Plan.

P	Questions for the Export Plan
PRODUCT	<ul style="list-style-type: none"> <input type="checkbox"/> What does the customer want from the product? <input type="checkbox"/> What features does it have to meet these needs? <input type="checkbox"/> How does it need to be adapted for Canadian markets? <input type="checkbox"/> How is it branded? <input type="checkbox"/> How is it differentiated versus your competitors? <input type="checkbox"/> Will there be special packaging and labeling requirements for Canadian markets? <input type="checkbox"/> Does it meet Canadian and international standards? <input type="checkbox"/> Do we need to consider other languages and units of measure?
PLACE	<ul style="list-style-type: none"> <input type="checkbox"/> Where do buyers look for your product or service? <input type="checkbox"/> If they look in a store, what kind? <input type="checkbox"/> How can you access the right distribution channels? <input type="checkbox"/> Do you need to use a sales team? <input type="checkbox"/> What do your competitors do, and how can you learn from that and/or differentiate? <input type="checkbox"/> How can you find the right partner?
PRICE	<ul style="list-style-type: none"> <input type="checkbox"/> What is the value of the product or service to the buyer? <input type="checkbox"/> Are there established price points for products or services in this area? <input type="checkbox"/> How will your price compare with your competitors? <input type="checkbox"/> How will you calculate the landed price which will include transportation costs? <input type="checkbox"/> What kind of payment terms should be negotiated?
PROMOTION	<ul style="list-style-type: none"> <input type="checkbox"/> Where and when can you get across your marketing messages to your target market? <input type="checkbox"/> What trade fairs should be considered? <input type="checkbox"/> Do you have a sufficient budget for promotion? <input type="checkbox"/> Will you reach your audience by advertising, use of media, or the Internet? <input type="checkbox"/> When is the best time to promote? <input type="checkbox"/> How do your competitors do their promotions? And how does that influence your choice of promotional activity?
PEOPLE	<ul style="list-style-type: none"> <input type="checkbox"/> What skills do the employees need? <input type="checkbox"/> Is senior management supportive? <input type="checkbox"/> Does your team understand how to deal with different cultures? <input type="checkbox"/> Have you selected the right partners, agents, distributors? <input type="checkbox"/> Does the entire team share the same values and have a focus on customer service?

Handout 08

Exporting Services to Canada

The service sector is the fastest growing sector worldwide. Increasingly services are being traded across borders. The following is a selected list of services which can be traded. There are 4 modes of exporting a service to Canada, and they are listed in the box below.

Services which can be exported

- Accountancy
- Advertising
- Architecture and Planning
- Audio-visual
- Business Process Outsourcing
- Construction and related
- Design services
- Education and Training
- Engineering
- Environmental services
- Event Management
- Finance and Investment
- Health-related
- Information Technology services
- Legal Services
- Marketing and Communications
- Management Consulting
- Packaging services
- Publishing services
- Translation
- Transportation and Logistics
- Travel-related ...and many more

Ways in which services can be exported

- **Mode 1: Cross border**
The service itself crosses the border.
(e.g. via internet, or transportation services)
- **Mode 2: Consumption abroad**
The buyer travels across the border.
(e.g. tourism-related, foreign students)
- **Mode 3: Commercial presence**
Establishment of an office or entity in the country.
(e.g. financial, construction or distribution services)
- **Mode 4: Movement of natural persons**
The supplier travels across the border.
(e.g. trades people, educators and trainers)

Exporting Services is Different

- Because a service is “invisible”, the Indonesian exporter is actually “selling a promise” to perform
- It is necessary to build your profile and credibility in the market
- Good networking skills at events helps to identify contacts and opportunities
- Relationship marketing helps to build confidence over time
- Establishing a strategic alliance with a foreign partner is often a good strategy
- Having excellent promotional materials is key – website, brochure, client testimonials, past projects
- Making the service more “tangible” also helps – videos, photos, demonstration of results

Handout 09

Selling directly to the Canadian buyer isn't always the best approach

As an exporter, it can be tempting to skip the middle-man in Indonesia and sell directly to a buyer in Canada. Sometimes, having fewer people involved in getting a product or service to Canadian consumers can increase an Indonesian exporter's profit margin. However, that's not always the case.

If an Indonesian firm:

- has never exported
- can't produce much volume
- doesn't know much about Canada
- doesn't have staff who can speak English or French



It might have more success partnering with an Indonesian intermediary.

If an Indonesian firm:

- has experience exporting
- has ability to increase production significantly
- has knowledge about Canada or has staff who can spend time researching Canada
- has staff who can read, write and speak English or French



It might consider partnering with a Canadian intermediary.

Handout 10

To evaluate a prospective intermediary in detail, use the checklist below.

Checklist for evaluating a prospective intermediary	
<p>Size of sales force</p> <p>Make sure they have appropriate human resources</p>	<ul style="list-style-type: none"> • How many field sales personnel does the agent or distributor have? • What are its short- and long-range expansion plans, if any?
<p>Sales of record</p> <p>Make sure they are secure, stable, and reputable</p>	<ul style="list-style-type: none"> • Has its sales growth been consistent over the past five years? If not, why not? • What are its sales objectives for the next year? How were they determined?
<p>Territorial analysis</p> <p>Make sure they cover the regions in Canada that you are interested in</p>	<ul style="list-style-type: none"> • What territory does it now cover in Canada? Is it consistent with the coverage you are looking for? • Does it have any branch offices in the Canadian region you wish to cover?
<p>Product or service mix</p> <p>Make sure they can represent your product appropriately</p>	<ul style="list-style-type: none"> • How many product or service lines does it represent? • Are they compatible with yours? • Does it represent any other Indonesian firms? • Would there be any conflict of interest?
<p>Facilities and equipment</p> <p>Make sure they have appropriate facilities and after-sales services</p>	<ul style="list-style-type: none"> • Does it have adequate warehouse facilities? • What is its method of stock control? • If servicing is required, is it equipped and qualified to do so? • If necessary, would it be willing to inventory repair parts and replacement items?
<p>Marketing policies</p> <p>Make sure they are knowledgeable about your product and motivated to sell</p>	<ul style="list-style-type: none"> • How is its sales staff compensated? • How does it monitor sales performance? • How does it train its sales staff?
<p>Customer profile</p> <p>Make sure they are knowledgeable about your sector</p>	<ul style="list-style-type: none"> • What types of customers is it currently in contact with? • Are its interests compatible with your lines? • Who are its key accounts?
<p>Suppliers represented</p> <p>Make sure you will receive a good level of attention.</p>	<ul style="list-style-type: none"> • How many principals does it currently represent? • What percentage of its total business would you represent? How does this percentage compare with other suppliers?
<p>Promotion</p> <p>Make sure they can help you with most or all of your market research and promotion needs</p>	<ul style="list-style-type: none"> • Can it help you research market information? • What types of media does it use, if any, to promote sales? • Would you be expected to share promotional costs? • If necessary, can it translate your advertising copy? • Does it have its own website?

Handout 11

Participating in a Trade Show

Trade shows are one of the most popular ways of promoting sales in Canada. There are specific tasks that need to be considered for each step in participating in a trade show. The following checklist is helpful to make sure that a firm/company is prepared for an upcoming trade show.

Step 1: Before the Trade Show.

Whether it is setting up its own booth as an exhibitor or just attending the trade show, the firm has to make sure that they plan ahead to make their visit successful.

- Set the objective for attending (Increased sales, obtaining new customers, or understanding the competition).
- Prepare the budget (airfare, hotel, promotional materials, etc.).
- Prepare promotional materials (business cards, brochures, etc.) Make sure photography for posters or brochures is high quality.
- Make sure the website is up-to-date and that there is a working email address.
- Design the booth to reflect the firm/company's brand. The firm should use their logo, colours and images that tell the story of their products.
- Prepare for travel (arrange travel documents, prepare for culture, language, etc.).
- Research the target customers and email them to set up an appointment

Step 2: During the Trade Show.

When a firm is at the trade show, their representatives should walk around and meet people. Firm's must research its competition and build relationships with potential partners or customers.

- Obtain list of delegates if available.
- Review representative's role in booth, product knowledge, what to say/what not to say. Interact with customers and be friendly.
- Make sure there is a lot of space for potential buyers in your booth. Do not overcrowd the booth or block the entrance.
- Walk around the show and research competition.
- Walk around the show and meet potential partners or buyers.
- Prepare give-aways at the booth (to collect business cards).
- Arrange publicity, interviews, press conference if appropriate.
- If the firm is selling their products at their booth, they need to make sure to have enough products with them to sell. Each product should be labelled with their logo and price. They should have a table near the entrance of their booth to process customer payments.

Step 3: After the Trade Show.

Now is the time for the firms make sure potential customers remember them. Although the trade show is done, there is a lot of follow-up work needed to keep building their relationships.

- Follow up with all key contacts and customers immediately after the show (either by email or by phone). Confirm orders and issue invoices.
- Follow up with any potential customers within two weeks of the show.
- Review budget, calculate expenses, pay bills.
- Set timeline target to close deal with potential customers.
- Continue networking with customers and potential customers.
- Analyze the success of the trade fair – new sales leads, new contacts.
- Identify key lessons learned to improve for the next show.

Handout 12

Laws and Regulations for Importing into Canada		
Health and Safety	Description	Guidance Documents
Consumer Product Safety Act Health Canada	Regulates the safety of consumer products to protect the public by addressing or preventing potential danger.	Canada Consumer Product Safety Act Quick Reference Guide
Hazardous Products Act and Regulations Health Canada	Regulates the sale and importation of controlled products (e.g., chemicals) considered hazardous and intended for use in a work place. Includes requirements for labelling with hazard symbols.	Work Safe B.C. Summary of Hazardous Products Act
Food Products	Description	Guidance Documents
Food and Drugs Act and Regulations Health Canada (enforced by CFIA)	Primary regulation that covers all food and beverage products, drugs (pharmaceuticals), cosmetics and therapeutic devices. Includes requirements for food safety, labelling, allergens, etc.	CFIA Food Guidance Document Repository Guide to Importing Food Products Commercially
Canada Agricultural Products Act** Health Canada (enforced by CFIA)	Regulates agricultural products for import, export and trade between provinces. Includes regulations for dairy products, eggs, fresh fruit, vegetables, honey, and livestock, among others.	Import Requirements for Fresh Fruit and Vegetables Import Requirements for Processed Foods
Fish Inspection Act** Health Canada (enforced by CFIA)	Regulates inspection of fish and marine plants. Sets the rules for the different types of fish and fish related products that can enter Canada.	Fish Import Program Policy
Meat Inspection Act** Health Canada (enforced by CFIA)	Regulates the import and export and trade between provinces of all meat and meat products. Sets rules for the inspection of meat and meat products and establishments where these products are prepared.	Meat Hygiene Manual of Procedures: Chapter 10-Imports Foreign Companies Eligible to Export Meat to Canada
Organic Products Regulations CFIA	Products labeled as organic must meet mandatory Canadian Organic Standards and be legally certified to be traded across provincial or international borders or to use the Canada Organic Logo.	CFIA Organic Products Canadian Organic Growers
Safe Food for Canadians Act CFIA, expected to come into force sometime in 2016. This act	This new Act will consolidate three CFIA inspection statutes for agricultural products, fish and meat into a single set of regulations that will apply to all food that is imported, exported or prepared for inter-provincial trade in Canada. Importers will have a greater legal responsibility for ensuring the safety of food they bring into Canada.	
Plants and Animals	Description	Guidance Documents
Plant Protection Act Environment and Climate Change Canada	Regulates the importation of plants to prevent the spread of pests that can pose a threat to plants, agriculture and forestry in Canada.	CFIA Plant Guidance Document Repository Plant Protection Import Procedures
Health of Animals Act CFIA	Sets rules to stop the spread of diseases and toxic substances that could affect animals or that may be transmitted by animals to persons. Includes animal products such as hides, leather, honey, etc.	CFIA Animal Guidance Document Repository Importation of Integumentary Tissue (hides/leather)

Competition	Description	Guidance Documents
Competition Act Competition Bureau	Maintains and encourages competition in Canada by regulating mergers, criminal business offenses (e.g., conspiracy, bid-rigging) and reviewable practices (e.g., competitor agreements).	Competition Bureau: Our Legislation
Combating Counterfeit Products Act Competition Bureau/CBSA	Provides new authority and tools to CBSA to reduce trade in counterfeit goods sold in Canada, including detaining suspected counterfeit goods at the border and in some cases laying criminal charges.	Innovation, Science and Economic Development Canada: Frequently Asked Questions Innovation, Science and Economic Development Canada Fact Sheet- What the Combating Counterfeit Products Act Means
Consumer Packaging and Labelling Act** Competition Bureau	Provides requirements for mandatory label information and product claims, as well as package design, fill levels and standard sizes.	Guide to the Consumer Packaging and Labelling Act and Regulations
Textile Labelling Act Competition Bureau	Outlines additional labelling requirements to protect consumers against misrepresentation of textile fibre products.	Guide to the Textile Labelling and Advertising Regulations
Customs	Description	Guidance Documents
Custom Tariff Act CBSA	Regulates the imposition of Canadian customs duties and other charges according to the World Customs Organization Harmonized System (HS) codes.	Customs Tariff by Chapter
Export and Import Permits Act GAC	Regulates the Import Control List and issuance of import permits for the importation of products on this list. Also sets out rules for Tariff Rate Quotas.	Memorandum D19-10-2 GAC Import Controls
Prohibited Goods CBSA	Outlines prohibited or restricted goods, including counterfeit products, certain agricultural products, offensive weapons, pornography, hate literature, various endangered species, and goods that are internationally sanctioned.	D9 Memoranda: Prohibited Importations
Tariff Rate Quotas CBSA	Outlines the established tariff rate quotas for agricultural products included on the Import Control List. Imports within the quota are subject to a lower rate of duty than imports above the quota.	D10-18-1: Tariff Rate Quotas

** Sometime in 2016, *The Safe Food for Canadians Act* will consolidate legislation from the *Canada Agricultural Products Act*, *Fish Inspection Act*, *the Meat Inspection Act*, and the food provisions of the *Consumer Packaging and Labelling Act*.

Handout 13

Types of Intellectual Property Rights

Trademarks	Patents	Copyright	Industrial Designs
<ul style="list-style-type: none">• A brand or other sign that identifies a company's goods or services• Registered trademarks in Canada have exclusive rights for 15 years (renewable)• Unregistered trademarks may still be protected under common law	<ul style="list-style-type: none">• An exclusive right granted for an invention - a product or process• Canadian patents apply for 20 years from date of filing an application• Protected and registered on a national basis (covers Canada only)	<ul style="list-style-type: none">• Protection for literary, artistic, dramatic and musical creations• Copyright is automatic; however, registration is still recommended• Copyright exists for the life of the author plus 50 years after death	<ul style="list-style-type: none">• Protection for the original visual features of an article• Registered industrial designs protected for up to 10 years in Canada• Firms can sell their rights or license others to make, use and sell their design

Source: Definitions from [Canadian Intellectual Property Office](#)

Handout 14

Types of Importation Documents

Depending on the product and country of origin, required documents may include:

1. **Bill of Lading or Airway Bill:** Contract for carriage issued by the ocean or air carrier. Gives title to the goods and signed copies are proof of ownership.
2. **Cargo Control Document:** Used by carriers to report shipments to CBSA (first record of shipment's arrival). Also used for shipments moved in-bond to an inland CBSA office, sufferance warehouse or bonded warehouse.
3. **Certificate of Origin (Form A):** Required by CBSA to establish where goods were manufactured and to determine the applicable rate of customs duty, including any claims for preferential rates of duty. More information can be found in [Memorandum D11-4-2](#).
4. **Canada Customs Coding Form (Form B):** Used to account for goods regardless of the value imported for commercial use in Canada. An [example](#) of the form is available from CBSA.
5. **Commercial Invoice:** Used by the exporter to charge payment of goods to the Canadian buyer. Exporters can provide either a [Canada Customs Invoice](#) (CCI) or their own forms that include all necessary standard information. CBSA uses the invoice to apply duties and other import taxes (e.g., GST). Avoid later reassessments by ensuring your invoice has enough detail to identify the goods, determine the quantity and establish the tariff classification correctly, including: date of issue, name and address of buyer and seller, contract number, description of goods, unit price, number of units per package, total weight and terms of delivery and payment.
6. **Inspection Certificates:** Sanitary and other certificates are required for some types of products entering Canada, including plants, seeds, animals, pharmaceuticals, nursery stock and meat. More information is available from [Health Canada](#).
7. **Export Permits:** Permits may be required, such as those for endangered species, and are issued by the Indonesian government.
8. **Import Permits:** Global Affairs Canada requires import permits for goods such as textiles and clothing, agricultural and steel products and some food items such as dairy products, poultry and eggs. [Other government departments](#) may require import permits for a range of goods.
9. **Packing List:** May be required to supplement a commercial invoice, and is provided by the shipper. Identifies the shipper, the shipping company and the importer.
10. **Insurance Documents:** Issued by the insurance underwriter and provides proof that the goods are insured as they are being transported.

Handout 15

Import documentation checklist

Please go through the following checklist and indicate which items you are totally familiar with and can prepare with little or no assistance.

Export Documentation	Yes	No	Unsure
Contract of Sale 1. <i>Pro-forma invoice</i>	Y	N	U
Contract of Carriage 2. <i>Bill of Lading</i> 3. <i>Air Waybill</i> 4. <i>Road Consignment Note</i> 5. <i>Rail Consignment Note</i>	Y Y Y Y	N N N N	U U U U
Insurance Policy Document ▪ <i>Marine Insurance</i>	Y	N	U
Payment-related Documents ▪ <i>Letter of Credit</i> ▪ <i>Bill of Exchange/Bank Draft</i>	Y Y	N N	U U
Other export documentation 1. <i>Commercial Invoice</i> 2. <i>Packing List</i> 3. <i>Certificate of Origin</i> 4. <i>Insurance Certificate</i> 5. <i>Pre-shipment Inspection Certificates</i> 6. <i>Fumigation Certificates</i> 7. <i>Health and Phytosanitary Certificates</i>	Y Y Y Y Y Y Y	N N N N N N N	U U U U U U U

