

# Appendix B

## A checklist for an overseas sales visit

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Preplanning is vital to a successful overseas sales trip. The following checklist highlights a number of important details you should cover to ensure that you make the most of your first, exploratory overseas sales trip.

- If you intend to apply for PEMD assistance, make your application two to three months prior to your planned departure (see *Financial information and assistance* in *The players* section for details).
  - Two or three months prior to your departure, write to the trade commissioner at the Canadian embassy in your target country(ies) and provide details of your product and your plans to market it. Outline your objectives and expectations for this first exploratory trip. As soon as your travel plans are finalized, inform the trade commissioner.
  - Use a reliable travel agency to help you plan your itinerary and to take advantage of the most efficient and economical travel routes. When you have approved the plan, make confirmed travel and hotel reservations and reconfirm them just before you arrive.
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Two or three months prior to your departure, write to the trade commissioner at the Canadian embassy in your target country(ies).

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- Carry a good supply of business cards printed in English or French on one side and, if possible, in the language of the country to be visited on the other. Exchange business cards with each of the contacts you visit.
  - Include a supply of business stationery, sales brochures, literature and photographs of your product for use abroad. A small dictaphone or recorder is very handy for making on-the-spot notes to yourself on meeting details, outcomes, agreements and undertakings made during your meetings.
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Give-away gifts related to your product or to Canada are always welcomed.

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- Carry a list of C.I.F. prices for all your products for each of the countries you plan to visit and of scheduled sailings to these countries from major Canadian ports.
- Samples of your products, if feasible, or small give-away gifts related to your product or to Canada are always welcomed by contacts. Check local customs regulations on these with your trade commissioner.
- Ensure that you have a valid Canadian passport and any visas required for your trip. Carry a few extra passport photos for additional visas you may need on the trip. You should also be sure that you have an up-to-date record of required immunization shots and you should carry it with your passport.