

APPENDIX B

A Checklist for an Overseas Sales Visit

Preplanning is vital to a successful overseas sales trip. The following checklist highlights a number of important details that you should cover to 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.

Give-away gifts related to your product or service or to Canada are always welcome.

- 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 or service 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 agent to help you to 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.
- 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 that 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.

- Carry a list of C.I.F. (cost, insurance, freight) prices for all your products for each of the countries that you plan to visit and a list 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 service 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 visa required for your trip. Carry a few extra passport photos for additional visas that 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.

Little things, like knowing the local dress code, meal times, how to address people, and other customs, will eliminate small problems and will win you the good will of your hosts.
