

Planning and Tracking: Emphasizing the Client

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The Trade Information Systems Division (TPP) develops support tools for our International Business Development (IBD) programs. WIN Exports, the most comprehensive database of Canadian export capabilities, and TAMS, a project tracking system widely used at our USA missions, are typical TPP products. We also manage the planning and tracking systems for trade missions.

Two factors are changing how DFAIT and other departments support IBD: budget cuts are forcing all levels of government to harmonize their efforts and better track their results; an avalanche of information readily available from other sources requires us to refine the services we offer our clients. These factors will affect how missions operate and the type of tools they need.

As the lead IBD department, DFAIT plays a prominent role in CIBS (Canadian International Business Development Strategy). CIBS is a consultative process through which 22 federal departments and agencies offering IBD services (and controlling a combined IBD budget of some \$600 million), provincial governments, regional development agencies and the private sector have agreed to eliminate duplication of effort and set IBD priorities and levels of service. This *Team Canada* approach to IBD requires extensive information-sharing among participants and an agreed set of procedures for dealing with our common business sector clients. As a result of CIBS, trade offices will come under increasing pressure from a wider range of intermediaries requesting services for their constituents. This will require us to

plan and track the results of our efforts in a format meaningful to other Team Canada players, including the business community. Another factor mitigating for client-based performance indicators is the Quality Service Initiative being introduced throughout the federal government. We must change from tracking activities to tracking our clients and the services we provide them.

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[Canadian business]. . . attaches high value to the types of intelligence that trade officers may be uniquely positioned to provide. Export-ready firms want trade leads, inside knowledge about decision-makers and up-to-the-minute status reports of large projects.
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TPP is working to provide better information sharing among CIBS participants and to provide improved planning and tracking systems for missions. This year we introduced a new, simplified Mission Planning System, and WIN for Windows, an improved yet simplified version of WIN Exports, our main sourcing tool. This version of WIN will also be deployed domestically to the International Trade Centers, the provinces and other Team Canada participants who will help us to maintain it.

WIN for Windows will incorporate several new features, the most important of which is the Client Tracking System (CTS). CTS replaces the outmoded quarterly Trade Tracking System (at last!). Using it, an officer can, with just a few clicks of the mouse, record actions taken on behalf of a

particular client. If the client is not a WIN registrant, the officer can also enter their address, fax number and contact name. The mission sends this tracking data to TPP. We integrate it into the main database and redistribute the latter to all WIN users. Data transfer will be effected by e-mail, but an *on-line* version is in production for Canada-based users. With CTS, WIN is no longer just a sourcing tool. It is also a messaging system, a client database and an indicator of workload at missions. Linking reports about client services to our client database means that for the first time we can see exactly what we do for whom, by mission, industry sector and location and type of client.

Information generated by CTS is vital for planning at several levels. Program managers at missions get an indication of workload distribution between staff members, can determine whether workload correlates to planned priorities and whether existing sectorial responsibilities should be adjusted between staff. Geographic divisions at headquarters can compare client-related activities between their missions. Provincial governments can see how well we serve their firms. CIBS participants will use the data for their next round of priority-setting.

WIN for Windows will also incorporate a Market Information Messaging System (MIMS) that enables trade officers to look up potential suppliers and fax them a trade lead, for example, directly from their workstation via SIGNET. MIMS messages are automatically added to the tracking system. In similar fashion, TAMS information, such as the list of firms participating in a trade event, is automatically tracked.

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