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A Guide to a New Business Model

***Re-Engineering the Delivery of the Trade
and Economic Program in Mexico***

**January, 1997
Department of Foreign Affairs and International Trade**

Foreword

The demands placed on Canada's Trade Commissioner Service in Mexico have changed substantially over the past several years. The volume of trade with Canada increased steadily after Mexico implemented a sweeping series of economic reforms beginning in the mid-1980s. The implementation of the North America Free Trade Agreement (NAFTA) in 1994 attracted a new wave of interest in Mexico, and a surge of requests for support from Canadian businesses. The trade agreement also created a whole new set of market access issues as Mexico amended hundreds of its regulations.

The following year, the Government of Canada introduced the Team Canada concept. This initiative was designed to coordinate the trade promotion efforts of government departments. The Team Canada concept reinforced the role of the Trade Commissioner Service: to identify and assess emerging markets, improve Canadian access to those markets, and provide market intelligence and support.

The Team Canada concept had many implications for the way that the Commercial and Economic Section of the Canadian Embassy in Mexico City and the consulates in Monterrey and Guadalajara fulfilled their mandates. In response, members of the Trade and Economic Program initiated a series of discussions to evaluate the needed changes. They concluded that they would need an entirely new business model. The model would have to include a team structure, redefined roles within the team and a new set of service standards. Such broad changes also implied the need for a training program, a plan for systematic implementation, and a method of assessing the performance of the new approach.

Guy E. Salessé, Deputy Director, Mexico Division (LMR), identified the need for the new business model and initiated the process of its development. In collaboration with Denis Thibault, Minister Counsellor at the Canadian Embassy in Mexico, they conceptualized the process and assigned a team to focus on developing the new approach. A team effort was mounted within the Department to take action on the ideas put forward by the staff in Mexico. Karl Boudreault, Senior Evaluation Manager, Office of the Inspector General (SIXE), was assigned the job of managing the project. Consultants were retained to facilitate the interviews, perform the research and provide the final concept for the new business model. They included Diane Charron, partner of Charron Dunlop and Daniel Dubé, partner of Samson & Associates.

The work was completed with the full cooperation and participation of the staff of the Commercial and Economic Section in Mexico City, Monterrey and Guadalajara. The project team is grateful for the insights of the staff: their practical knowledge of the current work process was essential to the validity of the new model; their continued cooperation and enthusiasm will be instrumental to making the new approach effective.

This guide is the end product of this broadly consultative exercise. It has two principal goals: to elaborate a vision for the new business model, and to provide a practical plan for putting it into action. The work was carried out in Mexico City, Monterrey and Guadalajara, and was limited to trade activities within Mexico. But it is anticipated that many of the ideas developed during the project will have broad application within the Trade Commissioner Service. The trade environment in Mexico has evolved more rapidly than in most countries, but we believe Trade Commissioners around the world are confronted with similar challenges.

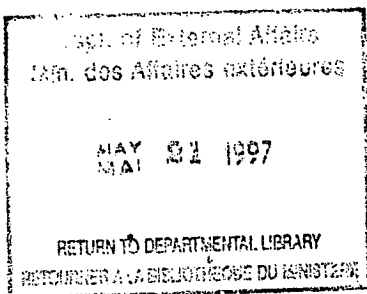


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Executive Summary

Background

In 1996, the Mexico Division (LMR), Latin America and Caribbean Bureau of the Department of Foreign Affairs and International Trade (DFAIT) developed a *Trade Action Plan for Mexico*. This plan implemented the Team Canada concept, in the context of changing demands for support from the Canadian business community. The *Trade Action Plan* envisioned a shift away from sectoral market information and event-driven activities, towards customized market intelligence and information-driven activities.

The staff of LMR in Ottawa and of the Commercial and Economic Section at the Canadian Embassy in Mexico City and in the consulates in Monterrey and Guadalajara concluded that these innovations would require an entirely new business model. A project team was appointed to conduct workshops in Mexico City, Monterrey and Guadalajara, consult LMR/DFAIT staff in Canada, and develop a model and implementation plan. This guide is the final result of this broadly consultative exercise.

The Need for Teamwork

The most important finding from staff workshops was a widely shared view that a *new team approach* would be needed. This reflects an understanding that intelligence gathering requires a network of pre-established personal relationships. The only way to maintain persistent contacts with a constantly rotating Canada-based staff is to share contacts and networking information within teams made up of both Canadian and locally engaged staff.

There was also a broad consensus that teamwork is most likely to be achieved if team activities are guided by *principles* rather than a traditional hierarchy. The principles identified include clear priorities, transparency and consistency, accountability, recognition of performance, and respect for risk-taking. These principles should drive the implementation of the new business model.

Business Processes

The new business model embodies a number of *processes* that are to be carried out in a team environment. These result in the delivery of support to Canada's exporters. They consist mainly of collecting business intelligence, assessing it, storing it, and using it to promote Canadian exports to Mexico.

Sources of Intelligence

Market intelligence is obtained from personal contacts based on established relationships. Such relationships are usually established and nurtured through two essential activities: calling on contacts and attending events and meetings. Staff will spend more time outside the office meeting with contacts as well as following up with them by telephone. It is

essential that the team develop methods of sharing contacts and intelligence-gathering results.

Uses of Intelligence

Under the new model, market information and intelligence is used for two purposes: improving market access for Canadian exporters and investors, and matching Canadian sellers with Mexican buyers. Improving market access involves four sets of activities: monitoring Mexican trade policy, advocacy, supporting Canadian delegations, and responding to support requests from Canadian companies. Matching buyers and sellers relies heavily on established networks. This process also involves outreach activities in Mexico and Canada.

Human Resource Organization

The new business model will require a committed work force, operating within an appropriate structure, continuously adapting to a changing environment. The most important factor in building team commitment is the communication of a clear vision of the new business model and the principles that underlie it. Teams must also be empowered to manage their own work processes and resources.

This guide provides roles and reporting relationships for four teams and establishes criteria by which their performance can be assessed. Role descriptions have been prepared for four major functions: Minister Counsellor, Trade Commissioner, Commercial Officer and Trade System Specialist. These functions will be distributed among several teams:

- The Mexico City staff are organized into sector teams. Two of the Trade Commissioners heading those teams also have functional responsibilities for trade promotion and trade policy.
- The Guadalajara and Monterrey teams each have three members, who are collectively responsible for all sectors in their geographic area.
- Special Initiatives Teams will be set up as needed to respond to requests by the coordinators or by a Trade Commissioner.
- A Business Direction Team is responsible for overall strategy, leadership, guidance and management. This team will be made up of the Minister Counsellor and the Trade Commissioners responsible for trade policy and trade promotion functions.

The managerial accountability framework now in place should be modified to reflect the new business model. A fundamental part of the new framework should include signing and decision-making authorities as well as access to an appropriate level of travel and hospitality budgets for Trade Commissioners and Commercial Officers, as these are essential tools in the process of developing contacts and gathering market intelligence.

Building Competency

The expanding scope of work has created the need for a broader set of *competencies*. New mechanisms will be needed to fill gaps in existing competencies and to identify and develop the new competencies that will be required to meet evolving needs. To facilitate this process, the project team has developed a series of *Competency Profiles* to be used as tools for identifying training needs and developing training plans for teams and individuals.

Performance Assessment

The shift towards teamwork and away from traditional supervisory approaches will require increased responsibility and accountability for results. Performance can be assessed by monitoring achievement of *service standards*. The project team recommends that existing standards be reviewed, clarified and revised. *A better understanding of clients and their needs is required.*

The project team has provided a set of *performance indicators* to assess the achievement of service standards. They include customer indicators, sector indicators, human resource indicators and workload indicators. Many indicators should be combined into an overall scorecard, to monitor performance on an ongoing basis.

Implementation Plan

The initial phase of introducing the essential concepts of the new model is already complete. The second phase, putting the model into action, will begin in February 1997. From April to June 1997, efforts will focus on consolidating the new model and developing a shared commitment. The final phase begins in September 1997, when newly arrived staff are integrated into the model.

Outstanding Issues

This guide presents a practical model for implementing team approaches to the job of supporting Canada's exporters in Mexico. But it is based on certain assumptions that were not evaluated as part of the project. It assumes the need to shift towards market intelligence and information-based activities. Moreover, it assumes that senior management will move quickly to clarify who the clients are and how service priorities will be set.

Re-Engineering the Delivery of the Trade and Economic Program in Mexico

The business model described in this document reflects a fundamental understanding that market intelligence is at the heart of international trade today. New technologies are making general information about Mexican markets available from a distance. Companies can conduct basic evaluations of opportunities in Mexico without ever leaving Canada. And when they do travel to Mexico and contact members of the Trade Commissioner Service, they are more prepared than ever before. They are increasingly focused on gathering *intelligence* that is specific to their firm's unique products and services, which is in contrast to seeking *information* about the overall market.

The staff of the Trade and Economic Program in Mexico understand that their resources, skills and efforts must be mobilized to serve these changing needs. From the beginning, this essential principle was the driving force behind the effort to develop a new business model. The model was also heavily influenced by the Team Canada concept and the *Trade Action Plan for Mexico*, which was developed to implement that initiative within DFAIT.

The Shift Towards Market Intelligence

The new business model incorporates a fundamental shift away from market *information* and towards market *intelligence* as the key element in the trade promotion support provided to Canadian companies visiting Mexico. The expectation that this trend will continue is a crucial assumption underlying most of the ideas and advice in this guide.

Mexican market information provided by DFAIT, for example the Export *i* Mexico series, is usually organized into sectoral profiles. It includes analyses of industrial structure along with descriptions of customers, competitors and regulatory agencies. It incorporates an outlook of emerging market trends over the near-to-medium term. And it features lists of contacts and sources of additional information. This information is intended to help Canadian companies to evaluate the Mexican market in their sector before they develop their own market entry strategies. It is distributed in the form of printed handbooks as well as using electronic media such as FaxLink and CD-ROM. This frees the Trade Commissioner Service abroad to focus on providing market intelligence and counselling services to individual businesses.

Market intelligence differs from market information because it relates to the market position of an individual company or product rather than to the market as a whole. It typically involves specific information needed to implement a company's market entry strategy and is generally of a confidential nature. Intelligence is, therefore, not usually disseminated on

a sectoral basis. Whereas market information is generally assembled from published sources, intelligence is acquired largely through personal contact and business relationships. Market intelligence tends to have a very short life span and is not usually pre-packaged. It is closely targeted and generally seen as value-added to pre-existing market information.

Market Information	Market Intelligence
Sectoral focus	Focused on individual companies
Available to any Canadian business	Provided to companies or groups of companies
Medium-term relevance	Short-term relevance
Prepared from published information, available at a distance	Prepared from close contact with personal sources
Can be assembled quickly, with little preparation	Requires pre-established network of contacts
Moderate added value from TCS	High added value from TCS

The Team Canada Concept

The Team Canada concept, introduced by the Prime Minister in 1995, underlies the new approach to trade promotion. It stresses the use of the Trade Commissioner Service as the delivery arm for coordinated trade promotion efforts by various federal government departments.

Members of Team Canada abroad have the job of stimulating the demand for Canadian products and services and matching Canadian sellers with the opportunities they discover. To do so, they must build contacts and sources of information within the local business community. Thus, the team members abroad are the eyes, ears and voice of the Canadian business community in Mexico. Their role includes the following specific functions:

- identifying and assessing emerging markets;
- improving Canadian access to those markets; and
- providing market intelligence and support in Mexico.

The Department's Team Canada partners are other federal government departments, including Industry Canada, Agriculture and Agri-Food Canada, ACOA, FORD Q and WD, as well as provincial governments. Those team members have a mandate to ensure that exporters become *export-ready* before they leave Canada. This means helping companies to understand Mexican markets, to assess their own capacity to export, and to learn the procedures and logistics of exporting goods and services. Among other things, this includes the delivery of market information prepared by DFAIT to end users.

The new business model is based on the assumption that the domestic team members will achieve their goals. At the same time, it recognizes that the Team Canada approach is equally dependent for its success on the work of team members abroad.

The roles of the domestic and foreign-service members of Team Canada can be compared to a relay race. The domestic members prepare the Canadian exporter at home and then pass the “baton” to members abroad to complete the race. This is a simplification. It serves to illustrate the point that to win the export race to Mexico, Team Canada members in Canada and Mexico must *both* win *their* part of the relay.

Canada’s Trade Action Plan for Mexico

Another element underlying the new business model is DFAIT’s *Trade Action Plan for Mexico*. This plan was prepared as part of Canada’s International Business Strategy, which is a key component of the Team Canada concept. This plan describes a new role for the Trade Commissioner Service within the team. It sets out four broad changes that are implied by the new mandate.

1. Greater distinction between market information and market intelligence. Market information can be packaged and disseminated in Canada on a sectoral basis. Market intelligence requires on-the-ground support in Mexico.
2. Moving away from event-driven activities and towards information-driven activities based on emerging economic and market trends.
3. Greater emphasis on helping small- to medium-sized Canadian companies. The domestic partners need to place a greater emphasis on assisting such companies to become export-ready before they leave Canada. This will position them to take advantage of the intelligence-gathering capabilities of the team members in Mexico.
4. Providing customized advice to individual Canadian companies.

These new approaches are expected to apply scarce resources more effectively so as to deliver services to those Canadian companies that are most likely to expand their export activities as a result.

Team Principles

Consultations with DFAIT staff in Canada and Mexico revealed a solid consensus that a new approach to providing trade promotion services was needed. Indeed, it was the perception of the need for change among the staff that led to this project in the first place.

More specifically, there is a widespread understanding that better *teamwork* will be the key to providing more effective support to Canada’s exporters. In particular, the staff believe that sharing information, ideas, experiences, clients and contacts will make both the team and its individual members more effective. They also believe that team members should be empowered to manage the performance of their unit by participating in planning, control, coordination and developing improvements. This kind of cooperation and participation is seen as not only making the organization more responsive, but also more adaptable to Mexico’s continuously changing business conditions.

There was also a broad consensus that teamwork should be guided by principles rather than a traditional hierarchical configuration. There is wide support among the staff for the proposition that specific principles

should drive the development and implementation of the new business model. It is believed that the consistent application of these principles will reinforce teamwork, remove some of the barriers to change and facilitate the transition.

The practical application of these principles to day-to-day operations will require the full participation of every member of the Trade and Economic Program in Mexico. A commitment to a shared set of values is a prerequisite for true teamwork. This commitment is most likely to be achieved if everyone on the team has a voice in defining those values. The desired outcome is a mutual understanding of the new roles, policies and work procedures that will be required. The key principles discussed by the staff are briefly described below.

Clear Priorities

Teamwork cannot be effective unless each team member shares the same understanding of who the clients are, what their needs are, and which clients and needs will receive the highest priority. Some staff believe that this was not accomplished under the previous business model, but that it is achievable through group participation.

Transparency and Consistency

Many of the staff hold the view that management decisions have not always been consistent or transparent. The result is sometimes a feeling of insecurity that comes from having one's work life affected by unseen factors. They believe that a team cannot function effectively if its individual members feel insecure. Therefore, decisions regarding staffing actions and priority setting must be clearly communicated to team members and seen to be rational and consistent.

Accountability

A recurring observation during staff interviews was that the organization lacks an adequate system of individual accountability. As a result, it is felt that some staff members are not pulling their weight, and some staff say that work gets passed on to other employees. This creates an environment which is not conducive to teamwork. A team works best when each individual is held responsible for his or her performance. Otherwise, other team members are not challenged to do their best.

Recognition of Performance

In an effective team, individual members often take initiatives that make the group as a whole more effective, but are not necessarily in the interests of the individual. Recognition from other team members is a strong motivator for this kind of behaviour. Many of the staff indicated that good performance was not presently recognized by management. This is seen as a disincentive for personal initiative.

Respect for Risk-taking

The shift in emphasis towards market intelligence and information-driven activities will be best accomplished in an environment which encourages the assumption of calculated risks and group learning from review of both positive and negative experiences. The staff believe that this would be more likely to occur if management was more tolerant of initiatives that, with benefit of hindsight, turn out to be mistakes.

Team Problem Solving

The project team held a series of discussions with the staff of the Commercial and Economic Section at the Canadian Embassy in Mexico City and with at the consulates in Monterrey and Guadalajara. In the process they identified a long list of factors that were seen to be interfering with productivity and motivation among the staff. They included several categories of problems:

- **Customer Problems.** There is a general lack of understanding about who the organization's clients are, and which requests for service should receive priority. Clients are often unprepared and have unrealistic expectations about the services they will receive.
- **Team Canada Problems.** The staff believe that there are too many companies arriving in Mexico that are not export-ready. At the same time, the staff are generally not adequately prepared with information about the capabilities and structure of Canadian industries.
- **Management and Administration Problems.** Many workshop participants expressed the view that administrative inefficiencies make them less effective in their work. Most of the specific complaints concern duplication of effort or the failure to clearly define responsibilities.
- **Data Access Problems.** Virtually every member of the staff reported some problem with obtaining information on Mexican companies and contacts. There was a general view that a better contact management system was needed to support more sharing of information among the staff.
- **Other Problems.** Some staff said that their work was hampered by the difficulties of working in three languages and distractions from trade promotion work caused by requests for immigration information or assistance. In some cases distractions are caused by the lack of an efficient filtering system for incoming calls and visitors.

The staff suggested dozens of potential solutions to individual problems. The project team did not evaluate these suggestions individually. Instead it considered the underlying problems as factors in the design of the new business model. The project team believes that effective teamwork, supported by a customer service orientation, leadership, and information sharing will effectively solve these kinds of problems as they occur.

Work Processes

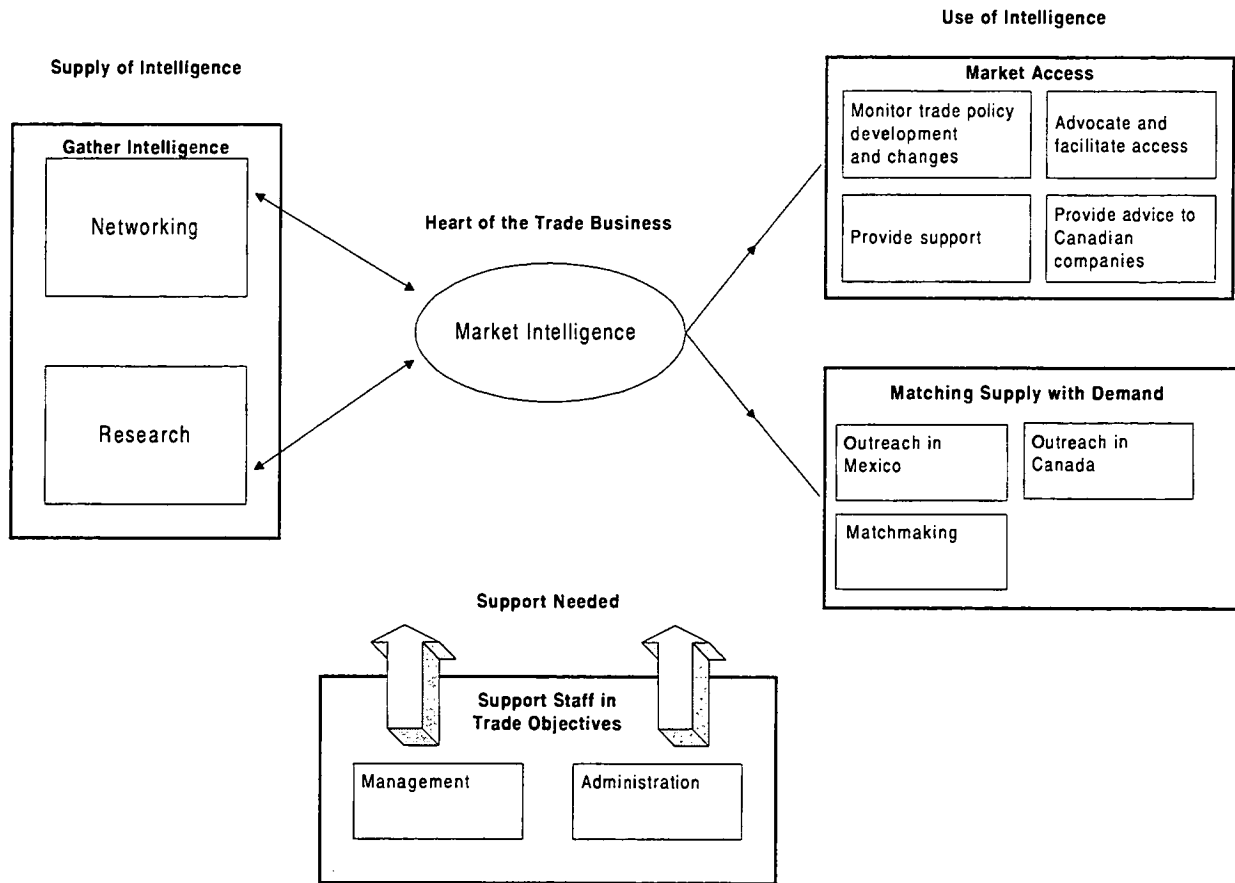
The Flow of Market Information and Intelligence

The new business model is a framework within which business *processes* take place. These activities result in the delivery of service to clients of the Trade Commissioner Service, which are reflected in observable performance indicators. This chapter describes the work processes required under the new business model.

The shift in emphasis from market information to market intelligence does not imply that the former will no longer be required. In some cases, requests for information from clients may simply be for more closely-targetted information than is available from existing sector-wide market profiles. But in an increasing proportion of cases, the need is for facts and opinion which must be obtained from established networks of contacts, often on an “off the record” basis. Thus the word *intelligence* conveys elements of both immediacy and confidentiality. The model reflects the continuing need for both information and intelligence. But at the same time, it takes into account that market intelligence will be the dominant focus of the Trade Commissioner Service in the future, and that new work processes will be required to provide it.

The provision of market information and intelligence can be seen as a flow of information between several work processes and more than one team member. Members of the team gather the needed information either through conventional market research or by accessing their pre-existing business networks. This implies that high-priority sectors will have been selected in advance so that networking activity is effectively targetted. Next, the team assesses the information and takes action to ensure that it can be accessed if it is needed again. The information or intelligence is then presented to the client or used in internal processes. All of these work activities are supported by appropriate management and administrative processes, as illustrated in an accompanying graphic.

MARKET INTELLIGENCE PROCESS



Targetting Intelligence-Gathering Activities

Members of the Trade Commissioner Service have limited resources to cater to a growing number of requests for service. Moreover, market intelligence is very difficult to acquire without first developing a network of contacts. This means that networking activities need to be concentrated in priority sectors. An initial group of priority sectors are identified in the *Trade Action Plan for Mexico* and they are listed in an accompanying table. Staff of the Trade and Economic Program must regularly review the situation and stay abreast of important developments in other sectors. Close collaboration with other members of Team Canada can help to identify sectors where Canadian capabilities are most closely matched to Mexican needs. In particular, this will require regular contact with the Mexico Division (LMR) and the T-Branch.

The interaction with other members of Team Canada can be accomplished using effective communications mechanisms within DFAIT. While the Trade and Economic Program ensures a presence in Mexico, DFAIT in Ottawa provides the link to Team Canada. Market information will be used to review the relevance of Mexican sectors in terms of opportunities for Canadian companies. Market intelligence will be used to flag events which may have an impact on Canadian business in those sectors.

The staff in Mexico will need to fully understand the Canadian side of the sectors they are assigned, including the business and industry structures as well as the Team Canada players responsible for those sectors. Good communications within the Mexican team will also be essential.

Priority Sectors	Additional Sectors of Interest
Advanced Manufacturing Technology and Industrial Machinery	Environmental Equipment and Services
Agricultural and Agri-Food Products and Services	Information Technology and Other Advanced Products and Services
Cultural and Educational Products and Services	Mining Equipment and Services
Electric Power Equipment and Services	Automotive Maintenance Equipment and Aftermarket Parts
Oil and Gas Equipment and Services	Transportation Equipment and Services

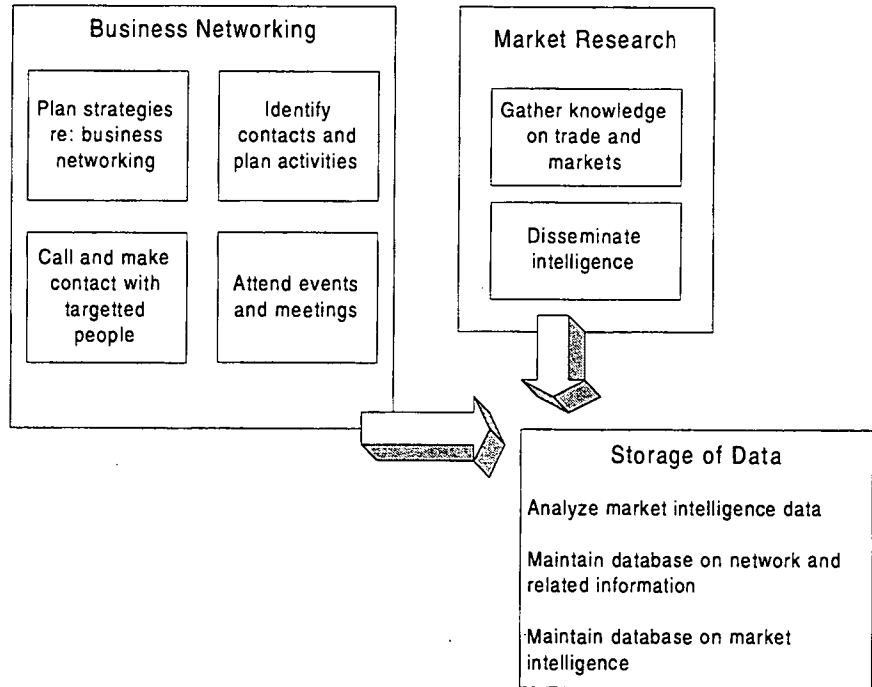
Networking Strategies

Once priority sectors have been identified, the staff in Mexico needs to develop strategies to become a part of and influence the business networks related to those sectors. To maximize the efficiency of scarce resources, members of the team will have to collaborate to ensure that existing contacts are put to good use and those in a position to contribute are known to the rest of the team. This will require regular follow-up on networking activities as they are planned and take place.

The next priority is to expand and systematically document new contacts. These could potentially be developed among trading agents, industry associations, government agencies, Mexicans who have had previous contacts with Canadians, and Canadian companies operating in Mexico. They can also stem from existing contacts.

Sources of Market Information and Intelligence

Supply of Market Intelligence



Gathering Market Intelligence

Market intelligence is generally obtained from personal contacts. Business relationships are usually established and nurtured through two essential activities: calling on contacts and attending events and meetings. A greater emphasis on market intelligence implies a change in work activities which places greater emphasis on interactive relationships. It means spending more time outside the office meeting with contacts as well as following up with them by telephone. It means more proactive work, where individuals control their own agenda and anticipate client needs, rather than simply respond to enquiries. This implies more judgment on the part of individual team members.

Intelligence gathering activities will be most productive in a client-oriented environment supported by solid teamwork. Staff will need good organizational, business and interpersonal skills, because this dynamic environment is not conducive to traditional methods of supervision. This in turn will require new concepts of accountability, where team members manage the performance of their unit and are responsible for the results. The Trade Commissioner and Commercial Officers will need to have access to the tools necessary for the development of business relationships. This includes flexibility of movement and reasonable travel and hospitality budgets. This will be a challenge, because this kind of networking is not a traditional public-service function.

Gathering Market Information

There are two main obstacles to the expansion of Canadian trade with Mexico: a lack of awareness of Mexican opportunities and a lack of familiarity with the Mexican business culture and practices. The Trade Commissioner Service works with Team Canada to provide information in both these areas. This is accomplished mainly through the *Export i Mexico* series of publications. It includes handbooks on market profiles, business guides and business tools that cover many aspects of marketing, financing and logistical issues in Mexico. In addition, the Department develops practical training tools which are provided to Team Canada and some business organizations. This has already begun to give trade-promotion staff in Mexico the time to devote more attention to value-added research.

Market information for priority sectors is typically obtained from published sources. This means reading newspapers and using the *Diario Oficial*, which is the Mexican equivalent to the *Gazette* in Canada. There is often an interaction between market information and intelligence, since information from published sources may be validated with personal contacts. This kind of activity constitutes value-added market research, as emphasized in the *Trade Action Plan for Mexico*.

The main responsibility for the production and dissemination of market information to Team Canada and the Canadian business community lies with LMR and T-Branch divisions. The Trade and Economic Program in Mexico contributes to its production by providing information mainly at the request of LMR or T-Branch. In the future, these divisions will need to clarify who the information is to be disseminated to and by what means.

Sharing Networking Information

Information obtained from networking activities will be most effective if it is shared within the team. This kind of market intelligence is often "soft" information, which is not always easily maintained in a structured database. But the team should revise the Department's existing Client Tracking System or develop another information retrieval system such as Lotus Notes®, to ensure that once collected, this information is readily available to team members. The Trade and Economic Program needs to assess the possibilities of alternative database tools, and to decide which one to use. If the Client Tracking System is acceptable, it should be the first choice as it will provide access for DFAIT members in Canada. In addition, the database structure is already developed, thus saving time and energy for the trade officers. If it does not provide all the information needed, the Trade and Economic Program should design a tool to meet the shortfalls.

Using Market Information and Intelligence

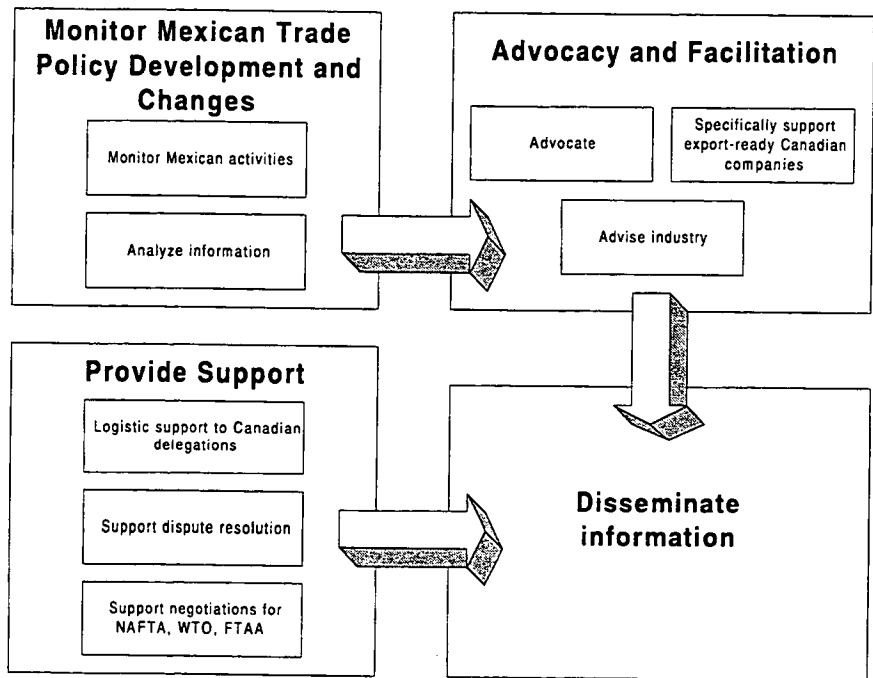
Market information and intelligence is used for two purposes: improving market access for Canadian exporters and investors, and matching Canadian sellers with Mexican buyers.

Market Access

Many obstacles to Canadian access to Mexican markets have been removed or reduced under the NAFTA. But ensuring that the elimination of trade impediments applies to specific products and services requires constant vigilance and advocacy by the Trade Commissioner Service. This advocacy role applies not only to trade and regulatory barriers, but also to the logistics of moving goods across the Mexico-US border. Interaction between Canadian business and Canadian officials in Mexico is essential to ensure that these efforts are closely targeted to real problems.

The market access function involves three sets of activities: monitoring Mexican trade policy, advocacy and facilitation, and providing support.

Market Access



Monitoring Trade Policy

The Trade and Economic Program monitors changes and new developments in trade policy to detect impediments which could limit access of Canadian business to the Mexican market. It also identifies new opportunities resulting from improvements in trade policies. This activity can be effectively carried out by the Trade Promotion Group because it is close to those who are affected by changes. It involves the monitoring of compliance with the NAFTA, WTO and other agreements. Trade policy issues can also be identified through discussions with Canadian companies operating in Mexico.

Advocacy

When a policy issue has been identified, the relevant Trade Policy Coordinator establishes a special initiatives team to assess the issue and make representations to the Mexican government agency involved. In many cases, more than one Trade Policy Coordinator will be involved.

The team will analyze the information available, identify additional information needed and ways to obtain it, and develop a strategy to deal with the issue. This team may also include staff outside the Trade and Economic Program. The underlying concept of the special initiatives team is to cross organizational boundaries and bring together the best-qualified individuals available for the task at hand. This approach ensures that key stakeholders have input to the process and it maximizes the probability that the problem will be solved quickly.

Once strategies and action plans have been developed, the special initiatives team will attempt to influence local authorities and politicians. The team leader is responsible for monitoring actions and progress and following up where necessary.

Support to Canadian Delegations

The market access function includes providing support to Canadian delegations and dispute resolution teams, as well as the NAFTA, WTO, and FTAA negotiation teams. Most of this support is directed to other members of Team Canada. The activities involved in this function are mostly related to facilitating enquiries and coordinating appointments with government officials. In cases of dispute resolution, the Trade Policy Group of the Commercial and Economic Section will provide advice on the selection of panel members, assess the positions of Mexican groups, analyze Canadian interests, and provide other information. Negotiation teams will be supported with assessments of the Mexican positions, analysis of Canadian interests and other information.

Corporate Requests for Specific Support

Some export-ready Canadian companies require specific support in the form of logistics or referrals. The trade promotion staff can respond to many types of requests:

- assisting with customs snags;
- solving specific market access problems;
- representing Canadian interests in meetings;
- providing targeted intelligence;
- opening doors to Mexican government officials;
- assisting Canadian companies dealing with international financial institutions (IFIs) or CIDA;
- providing information needed for financing;

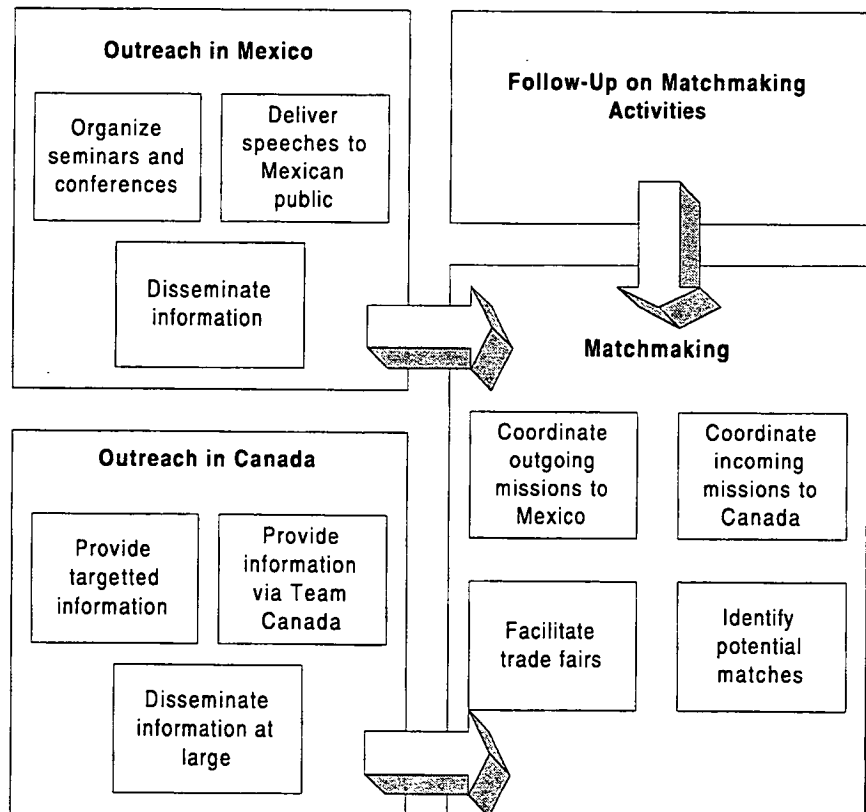
- providing the names of buyers, agents, lawyers and other professionals; and
- providing logistical support, such as scheduling meetings and arranging translation or interpretation.

Providing specific support for export-ready Canadian companies could be characterized as passive, in the sense that it is generally triggered by a request. The Department may wish to consider full or partial cost recovery by charging a fee for some of the services provided to Canadian companies. The specificity of the request for assistance might be one criterion for cost recovery.

Matching Buyers and Sellers

Matching buyers and sellers is a key business process for the Trade and Economic Program in Mexico. This is a value-added activity that relies heavily on established networks of team members. This process involves many outreach activities undertaken in both Mexico and Canada. Regardless of the location and the nature of the activity, the purpose is to match Canadian capabilities with Mexican needs. Continuous follow-up is needed to ensure that appropriate action has been taken and that resources are not wasted.

Matching Buyers and Sellers



Outreach in Mexico

The lack of awareness of Canadian capabilities by potential Mexican buyers is a significant impediment to increased trade. Outreach activities in Mexico revolve around organizing and/or attending seminars and conferences, and making presentations at these events. In addition, speeches are researched, written and translated by Trade and Economic Program staff and delivered by Embassy and consulate officials at a wide range of events.

When organizing a conference or seminar, the Trade and Economic Program identifies contacts and provides logistical support for the event. Logistics services can include translation and the coordination of Mexican customs clearance for samples and promotional material.

Other methods of information dissemination include the provision of company profiles and promotional material to the Mexican business community, answering enquiries about Canadian capabilities, and promoting the Trade Commissioner Service in the local community.

Outreach in Canada

To overcome the lack of information about Mexican opportunities, the Trade Commissioner Service provides targeted information to Canadian companies and business organizations, as well as Team Canada members located in Canada. This information may be provided through participation in seminars and conferences, meeting Canadian companies or answering direct enquiries. Information provided via Team Canada can take several forms. They include market studies, trade data, articles in *CanadExport* or industry publications and profiles of Mexican companies. Answering requests for information from other Team Canada members are also part of this function.

Coordinating Incoming Missions to Canada

The *Trade Action Plan for Mexico* identifies incoming missions to Canada as a major priority for the future. Mexican companies and government officials can see Canadian capabilities and technologies at work by visiting the facilities of potential Canadian partners. This approach, combined with visits to Canadian trade shows, offers an efficient means of supporting the partnering process. This activity involves the provision of logistical support including travel arrangements, appointment scheduling, tour organization, appointments with government officials, and escorting the mission. Follow-up by the Trade and Economic Program is essential to maintaining contact and getting the most out of the relationships that were established.

Coordinating Outgoing Missions to Mexico

Organizing missions to Mexico for Canadian companies is another match-making activity carried out by the Trade and Economic Program. Companies need help to prepare and target their demonstrations so they

can illustrate how the product or service could satisfy specific Mexican needs. The team should attempt to maximize the media coverage of such missions.

Facilitating Trade Fairs

Successful Canadian companies are familiar with the use of trade fairs as a means of expanding business; for the most part, they can participate in such events without assistance. Canadian information booths at some trade fairs will continue, but the role of the Trade and Economic Program is evolving into that of a facilitator rather than a sponsor. Depending on the role played by the service, the activities may involve recruitment of Canadian companies, preparation of guest lists, attendance at events, provision of translation services, recommendations for side visits, preparation of information kits or press releases, briefings and the delivery of speeches.

Identifying Potential Matches

As the matchmaking process advances, actions will become more targeted and precise. The ultimate objective is an actual match of a Mexican buyer with a Canadian seller. This activity is initiated upon reception or detection of a request for a quotation or proposal. Such requests should be shared between the Commercial and Economic Section in Mexico City and the consulates in Guadalajara and Monterrey. The activity then involves searching in a common database, contacting the International Business Opportunities Centre (IBOC), industry associations and other contacts for assistance, and calling Canadian companies that could potentially respond to the request. Team members may also attend meetings with Canadian companies which respond.

Follow-up on Matchmaking Activities

The effectiveness of matchmaking activities should be continuously monitored and assessed. This activity involves tracking results and following up with both the Mexican and Canadian companies involved. This enables the Trade and Economic Program to identify problems related either to the matchmaking process or the individual companies. In some cases, it may result in adjustments to the process.

Supporting the Team

For a team approach to trade promotion activities to be successful, the Trade and Economic Program staff must be supported with appropriate management and administrative processes. Management should put systems in place to ensure that resources are used efficiently, and that staff participation is encouraged. This can be done in a number of ways:

- enabling input by staff into the management process;
- providing advice on strategies;
- creating a work environment where resources are mobilized when needed;
- providing the means for sharing information and ideas;
- setting priorities to guide staff decisions;
- clarifying roles and responsibilities within DFAIT in Ottawa and Team Canada;
- providing current information on the status of clients and services;
- providing training and other skills development opportunities;
- providing a workload allocation method which distributes work and resources equitably;
- automating repetitive tasks;
- following up on activities;
- providing business information systems;
- enabling performance measurement and continuous improvement;
- setting limits on “shoulds” and “should nots.”

Administrative support is provided by ensuring that the equipment and facilities are well maintained and functioning properly, by providing backup systems, and by operating an effective filing system.

Human Resource Organization

The new business model embodies a series of work processes that must be carried out in a team setting. This will require a committed work force, operating within an appropriate structure and continuously adapting to a changing environment. This chapter describes the basic mechanisms and relationships that will establish these conditions. These should be adapted and refined by team members as the new model is implemented.

Team Commitment

Staff commitment to the team is essential to the task of successfully implementing the new business model. But this is a complex issue, affected by many different factors. Managers will have to give priority to a wide variety of staff concerns and issues throughout the implementation process. Strong leadership is essential in an atmosphere of major change where entirely new roles, reporting relationships and coordination mechanisms are being established. The process must be visibly supported by senior management of the Department and the Post.

The most important factor in building team commitment is the communication of a clear vision of the new business model and how it will be applied. Consistent adherence to underlying principles is another important issue. Both of these approaches will provide team members with stable reference points as they adapt to their own activities to the changing environment. Managers will gain the confidence and trust of staff when they demonstrate that the process is rational, consistent and transparent.

Resources

The ideal team structure depends both on the objectives of the organization and the resources available to achieve them. Under the new approach, the demand for market information and trade event coordination will decrease significantly. And the work force available to provide all trade promotion services will also be reduced. The resources required in 1997 will be as follows:

- 16 person-years in Mexico City (five Canada-based Trade Commissioners, six locally engaged Commercial Officers and five trade system specialists);
- three person-years in Monterrey, including one Canada-based Trade Commissioner; and
- three person-years in Guadalajara, including one Canada-based Trade Commissioner.

There are additional constraints on resources. The annual turnover rate of Canada-based personnel is potentially 50 percent. In addition, not all Canada-based personnel are sufficiently fluent in Spanish. The new business model must focus the contributions of each group of employees

in areas where they can make the maximum contribution to the team effort.

Roles

The project team recommends four major functions within the team structure. One would be assigned to Canada-based staff, one to the locally engaged Commercial Officers, one to the locally engaged Trade System Specialists, and one to the Canada-based Trade Commissioner who will be responsible for the coordination of the trade promotion and trade policy functions.

The success of the Trade and Economic Program will depend heavily upon the continuity of a viable intelligence network. Business relationships which lead to the exchange of sensitive information require careful nurturing. Especially in the Mexican business environment, it takes time to develop such relationships: people generally become friends before doing business. This means that ongoing personal relationships with the Mexican business community will be needed. Accordingly, the new roles expand the base of accountability to sector teams rather than individual staff.

The transition from market information to market intelligence also implies a different relationship with locally engaged staff. Continuity can be difficult given the typical two-to-three year period of a posting. Consequently, locally engaged staff will have to play a larger role than they have in the past. They must take greater responsibility for maintaining persistent contacts as Canada-based team members come and go. This means a much greater use of teamwork and sharing of contacts and intelligence than was required when the focus was on market information and event-driven activities. It also means that local staff must have a clear mandate and be recognized for their contribution to the stability and effectiveness of the organization.

An accompanying illustration gives a brief definition of each of these roles. Appendix 2 provides detailed descriptions of the roles of the Minister Counsellor, Trade Commissioner, Commercial Officer and Trade System Specialist. These descriptions are intended as tools for role clarification within the teams. They should be useful for setting personal objectives as well as for identifying individual learning needs.

Summary of Major Roles*	
Canada-Based Trade Commissioner	<ul style="list-style-type: none"> • provide the Canadian context, perspective and expertise required to develop export markets for Canadian goods and services in Mexico in specific sectors; • act as the official Canadian representative in trade matters in front of Mexican officials and the business community; and • provide leadership to a team working in those sectors by identifying objectives for the team, by developing plans and processes to support these objectives, by allocating appropriate resources within the team, and by developing the human capacities of team members.
Locally Engaged Commercial Officers	<ul style="list-style-type: none"> • develop and maintain contacts within the Mexican and Canadian business communities to ensure the stability of an effective network in these sectors; and • provide expertise on the Mexican context, perspective and opportunities to Canadian exporters of goods and services in certain sectors of the Mexican market.
Locally Engaged Trade System Specialists	<ul style="list-style-type: none"> • provide information, systems and logistical support as part of, or for, teams working in specific sectors.
Canadian Coordinators for trade policy and trade promotion functions (Canada-Based Trade Commissioner)	<ul style="list-style-type: none"> • provide expertise in this area, to give in-depth advice to staff on relevant issues and training to those who need support; • coordinate special projects that need to be undertaken in this area; • making links with LMR Ottawa staff working with the appropriate sector team as required; and • monitor activities related to this area within the different sector teams.

*Appendix 2 provides a detailed profile for each of these roles.

Reporting Relationships

Effective management of the team approach will require a new set of reporting relationships. The project team recommends the organizational structure shown in the accompanying graphic. In this new organization, all Canada-based staff report directly to the Minister Counsellor and are responsible for managing the members of their team and the sectors they are assigned. The Minister Counsellor shares the services of a trade system specialist allocated to the Trade Commissioner who is responsible for the coordination of the trade promotion function.

The Mexico City staff are organized into four teams, each having responsibility for specific sectors. Two of the Trade Commissioners heading those teams also have functional responsibilities, one for trade promotion and one for trade policy. The Trade Commissioners overseeing the trade policy and trade promotion functions are responsible for:

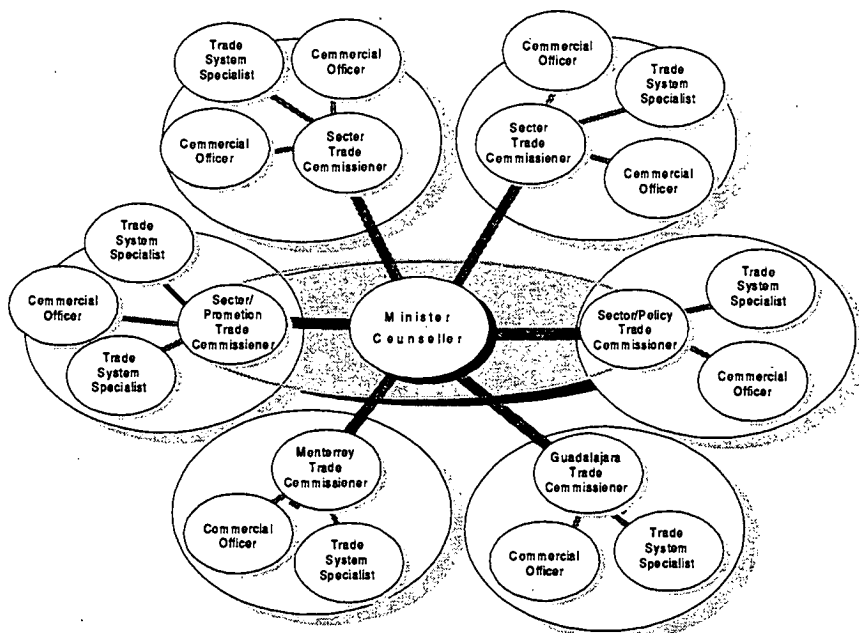
- coordinating the overall activities of the function;
- performing specialized tasks or projects related to the function;
- providing functional expertise and training to staff who will be involved in activities pertaining to the function; and
- providing input into the performance evaluation of staff.

The Guadalajara and Monterrey teams each have three members, who are collectively responsible for all sectors in their geographic area. The Trade and Economic Program could also consider assigning certain sectors to the consulates if they are concentrated in those geographical areas.

The managerial accountability framework now in place should be modified to reflect the new business model. A fundamental part of the new

framework should include signing and decision-making authorities as well as access to an appropriate level of travel and hospitality budgets for Trade Commissioners and Commercial Officers, as these are essential tools in the process of developing contacts and gathering market intelligence.

Structure: Commercial and Economic Section — Mexico



Integration and Coordination Mechanisms

To support the new roles and reporting relationships, appropriate processes and mechanisms are needed to enhance communication, coordinate the efforts of team members, improve the capacity for continuous learning, and increase employee morale. The project team recommends the establishment of three coordinating mechanisms: a Business Direction Team, Sector Teams, and Special Initiatives Teams.

The Business Direction Team

The Business Direction Team plays a strategic role. Its tasks are:

- to develop a strategy for promoting exports of Canadian goods and services to Mexico;
- to create an organizational infrastructure for a high-performance working environment;
- to identify, recruit and develop needed competencies, and to act as mentors to key personnel;
- to provide leadership and direction regarding the nature, timing and extent of the unit’s activities; and
- to provide functional direction for team activities.

This team will be made up of the Minister Counsellor and the Trade Commissioners responsible for trade policy and trade promotion

functions. When required, this team can be expanded to include other staff, such as the two regional Trade Commissioners.

Sector Teams

Sector Teams carry out the principal work of the Trade and Economic Program. Their responsibilities in assigned sectors are:

- to maintain a comprehensive network of contacts in Canada and Mexico;
- to assess the local situation and make recommendations on trade promotion and policy issues;
- to match Canadian export capabilities to opportunities in Mexican markets;
- to support specific exporters entering the Mexican market;
- to answer inquiries;
- to maintain documentation and information systems; and
- to set up and coordinate missions, visits and training programs.

Ideally, each of these groups will develop into autonomous teams with responsibility for all the work in the assigned sector. They should be accountable for their performance and at the same time empowered to manage their own resources. Each team would be supervised by a leader who would support the team as coach and trainer. But the team should preferably share certain responsibilities as a group, including:

- assigning tasks and scheduling activities;
- managing quality control;
- meeting regularly to solve problems, review workload and assess performance; and
- identifying training needs and participating in training to develop technical and interpersonal skills.

Establishing this approach will require significant time and effort. But once the necessary mechanisms are in place and understood by everyone concerned, they should require little maintenance. If the teams work effectively, the result will be a much better informed and involved staff along with a more vibrant work environment. These are essential requirements for the effective collection and management of market intelligence.

Special Initiatives Teams

Special Initiative Teams will normally be set up to respond to a request by the coordinators of the trade promotion or trade policy functions or by a Trade Commissioner responsible for a major project. A coordinator, for example, might be called upon to prepare a special report on a trade policy issue. Or the Trade Commissioner might be asked to coordinate a major delegation to Mexico.

When such requests are received, the Business Direction Team would consult with the relevant team leaders to arrange for seconded staff, before accepting the project. To function effectively, these teams must have a clear mandate in addition to well-defined resources, time constraints and reporting relationships.

Building Competency in a Changing Environment

The expanding scope of the work being done by the staff of the Trade and Economic Program has created the need for a broader set of *competencies*. A competency is the ability to apply knowledge and skill to solve a problem or achieve a goal. It is embodied in a person or group of persons and is observed as a set of behaviours combined with a supporting attitude.

New mechanisms will be needed to fill gaps in existing competencies and to identify and develop the new competencies that will be required to meet evolving client needs. Training plans must be developed for the Program as a whole and for individual staff members. To facilitate this process, the project team has developed a series of initial *Competency Profiles* to be used as tools for identifying training needs and developing training plans.

Competency Profiles

The new roles of the Trade Commissioner, Commercial Officer and Trade System Specialist demand a high level of proficiency in several areas. They require competencies related to technical issues, customer service, thinking, communication, interpersonal relationships and self-management.

The level of proficiency and the priority for filling gaps varies depending on the role of the individual. But the team as a group should incorporate high levels of competency in each area. Competency Profiles for each of the three roles are presented in Appendix 3.

Competency Gaps

As part of this project, the staff in Mexico used the Competency Profiles to identify gaps between the required competencies and existing levels of staff proficiency. Different levels of intervention will be required to fill these gaps. In some cases, specific skills are needed and these were identified as *training needs*. In other cases broader adjustments to ways of doing things are needed. These involve integrating new skills with new attitudes, and they are referred to as *competency development needs*.

Training Needs

Training needs can be solved by providing information and conducting skill-building sessions and activities. The staff identified several priority categories for:

- computer literacy;
- English and French language training for locally engaged staff;
- Spanish language training for Canadian staff;
- government structure in Canada and Mexico;
- international trade and trade policy;
- the economics of international trade; and
- sector expertise.

Competency Development Needs

Competency development needs encompass a complex set of knowledge, attitudes and skills. They require an active learning approach, such as:

- Group workshops where participants are challenged to deal with broad issues. Group problem solving as well as interaction and feedback within the group are the key learning devices.
- Meetings where work teams are asked to assess a specific practical problem and to come up with viable solutions. A retrospective understanding of successful problem-solving processes is the key learning device.

The main competency development needs that will require this type of approach are:

- working as a team;
- providing customer service;
- personal management;
- communication; and
- negotiation.

An Environment for Continuous Learning

The training and competency development needs identified by the staff will be the main priorities for the initial implementation stage. Sustained long-term success requires an environment where learning is seen as a continuous process.

Cyclical Training Plan

Training and competency development needs are described in more detail in the Learning Action Plan provided in Appendix 4. The plan also specifies the priority activities to be undertaken during all four phases planned for the project. This plan is offered only as the first round of learning activities. Over time, new training needs will be identified and the plan will need to be updated through a group re-evaluation process.

Individual Training Plans

In addition to the general training needs that have been identified, individual members of each team are aware of specific areas where they require more proficiency. As part of the team building activities of the Sector Teams, each member should take the opportunity to identify these areas and to present and negotiate a personalized learning plan. One of the responsibilities of the leader of each Sector Team is to support each member and facilitate each learning plan.

Performance Assessment

An organization's *performance* means the degree to which it achieves its goals and objectives. In some organizations, performance can actually be measured, such as in the number of units per hour produced and the cost per unit. Things are more complex in the context of the Trade and Economic Program where there is no standard product and quality is not easily measured. Nonetheless, performance can be assessed by monitoring the achievement of broad *service standards*.

The success of the organization in meeting its established service standards is usually assessed by reference to a set of *performance indicators*. These consist of different types of information about the service being provided. Those services are in turn motivated by a set of *performance drivers*. A comprehensive performance assessment system must take each of these concepts into account.

Service Standards

A set of service standards for the Trade and Economic Program are contained in the *Trade Commissioner's Pledge of Quality Service*. These should be reviewed and revised in light of the changing role of the Service and the reduced resources available. The success of the new business model depends upon acceptance by the staff that these are *their* standards and that they constitute a public statement of their commitment to their clients. For these standards to be an effective motivator, staff must clearly understand who their clients are and which clients should receive priority. As it stands, there is some confusion on this point.

More specifically, the staff must share an unambiguous concept of the following:

- Who are the clients?
- What are their needs?
- What are the priorities when there are conflicting requests?

Another aspect of service standards that has not yet been developed is a policy on cost recovery for some services. The existing *Pledge* establishes that direct costs incurred on behalf of a Canadian company are recoverable. But clear guidelines are needed to apply this principle in everyday situations. Translation services are an example of a fairly obvious direct cost that is usually recoverable. But on a broader scale, should the Service be charging for the provision of direct support to a Canadian company?

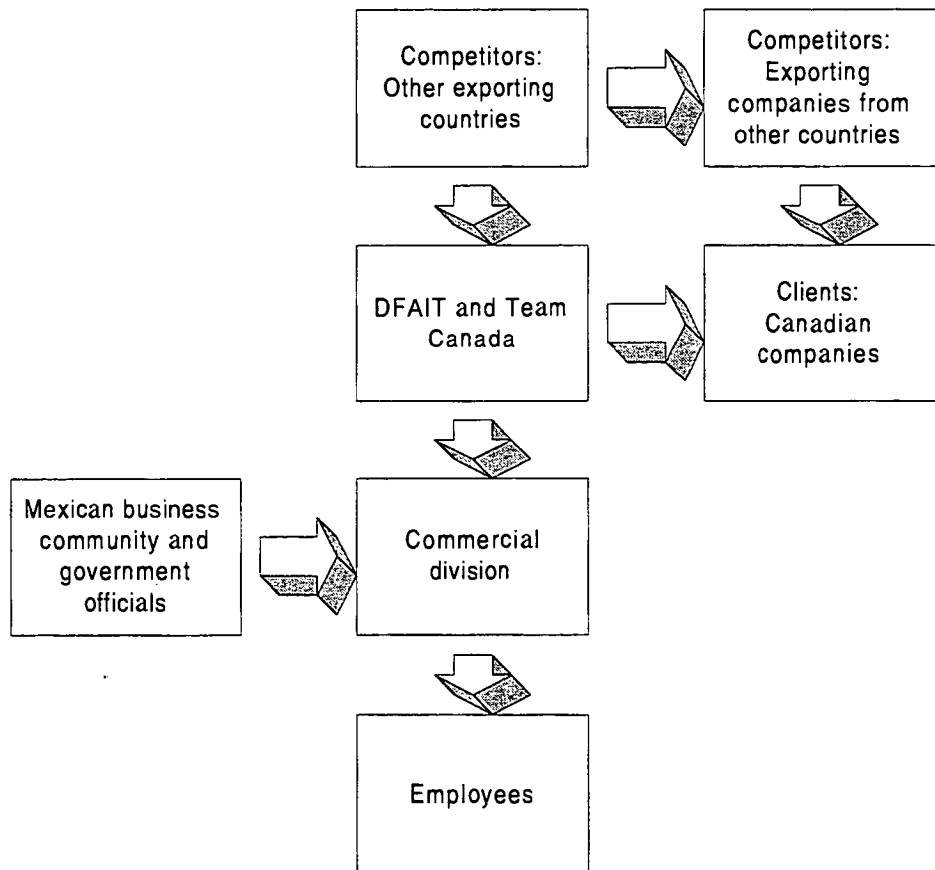
The service standards should also explicitly state expectations about the competencies of clients arriving in Mexico. To a large extent, they must assume that the efforts of other Team Canada members will be successful. If the inflow of requests from companies that are not export-ready is not reduced substantially, the Program will have great difficulty making the transition to an intelligence-oriented service.

Performance Drivers

Performance drivers are the internal and external stakeholders that motivate activity within the organization. In many cases, their actions are beyond the influence of the team. But they should be carefully considered when defining service standards and establishing performance indicators.

The principal performance drivers for the Trade and Economic Program include Canadian clients, Mexican partners and employees. But there are many other stakeholders and competitors that influence performance. An accompanying illustration outlines the basic relationships between stakeholders who drive performance of the Trade Promotion and Policy functions.

Performance Drivers



Performance drivers operate on three main levels:

- First, competitors apply pressure on Team Canada, DFAIT and the Trade and Economic Program to outperform them. This pressure results from the need to obtain a larger share of the Mexican market for the Canadian business community.
- Second, the Canadian business community applies pressure to provide better service. This provides the push for DFAIT and the Trade and Economic Program to develop better ways of satisfying its clients, as reflected in the current reengineering initiative.
- Third, performance depends greatly on stakeholders who contribute to success. These include Team Canada, DFAIT and the Trade and Economic Program employees. They each have a role in achieving success, and performance indicators must, therefore, encompass their activities.

To a lesser extent, the Mexican government and business communities are also performance drivers. Their attitudes and activities greatly affect the team's ability to sway Mexican business towards buying Canadian and to advocate Canadian interests within the government.

Specific Performance Indicators

The Trade and Economic Program team will have to develop and elaborate its own performance indicators on an ongoing basis. To help with a quick start, the project team has prepared a preliminary list. These are based on workshops with the staff in Mexico as well as expertise within the team. Each of these should be taken into account as the team develops a comprehensive performance assessment system.

Customer Indicators

The customer's perspective is one of the most important performance indicators. Ideally, core customers should be consulted in the development of these indicators, because they reflect the expectations that clients have. At the very least, team-developed indicators should be validated with core customers.

The Program provides a wide range of services to customers, ranging from "heads-up" flags of upcoming events or policy changes to assessments of a specific policy or market situations. Only the end-user of this information can provide an unbiased assessment of the value of the information and the efficiency with which it was delivered.

Customer Indicators	
Client Satisfaction	Turnaround time for requests Number and/or percentage of satisfied customers Quality of information received Number of clients reached Quality of advice provided
Market Access	Number of policy changes improving market access for Canadian business Timeliness of warnings given to the Canadian business Number and/or percentage of access issues resolved Number and/or percentage of shipments saved by prior warning Number and/or percentage of disputes resolved Number and/or percentage of satisfied negotiation teams Number and/or percentage of customs snags resolved Number of doors opened for Canadian companies
Matching of Supply and Demand	Number of successful ventures or matches Number and/or percentage of satisfied Canadian participants to: <ul style="list-style-type: none"> • outgoing missions • incoming missions • trade shows • number of business opportunities (bids and requests) directed at Canadian business • number of missions which led to business for Canadians in Mexico

Sector Indicators

Another aspect of performance is the success of the Trade and Economic Program in servicing priority sectors. The *Trade Action Plan* sets out five priority sectors and five additional sectors of interest. Performance indicators should be developed for each.

These indicators should focus on assessing the position of Canadian companies relative to the major competing countries. The Trade and Economic Program should consider competitors' trade promotion programs as well as their own. That way, Canada's performance can be compared with the competition. Information about competitors' activities can be hard to get, but this factor is still an important consideration.

Sector Indicators	
Canadian share of sectoral markets	Change in the Canadian market share
Number of Canadian companies in the market	Number and dollar value of new entries
Major competitor-countries and their share of the market	Relative effectiveness of Canadian and competitors' programs
Turnaround time for activities	Type of activities
Effectiveness of advocacy strategies	Quality of services

Human Resource Indicators

The success of any organization depends heavily on its ability to develop a skilled work force and meet its needs. A competent and highly motivated team is especially important where the organization takes on complex tasks such as trade promotion. Human resource indicators focus on the success of the organization in creating an environment where individuals are motivated and productive.

Human Resource Indicators	
Locally engaged staff turnover ratio	Number of employee-initiated improvements in business processes
Percentage of employees having an individual learning plan	Training and competency development hours per employee, per year
Measure of employee competency growth	Number of grievances
Employee satisfaction, i.e., percentage of satisfied employees	

Workload Indicators

The work activities of the Trade and Economic Program involve the acquisition of relatively low-cost inputs and transforming them into high-value outputs through the application of value added by team members. Thus, an indicator of the performance of the organization is an estimate of that value added. The costs expended in producing services delivered to customers helps to quantify where the organization's efforts were allocated. It also provides a base point for estimating the value of the services themselves.

Workload Indicators	
Market Access	Number of political and policy changes Number of access issues Number of disputes Number of negotiations Number of customs snags Number of requests from Canadian companies Number of reports disseminated Number of speeches delivered
Networking	Number of sectors Number of export-ready companies Number of export-ready companies in each sector Level of complexity of the business network in each sector Number of Mexican companies in the sector Structure of the manufacturing and distributing process in the sector Number and percentage of active contacts Number of new contacts made Number of events attended Number of meetings attended Number of contacts in the database
Matching Buyers and Sellers	Number of seminars organized and attended Number of speeches delivered Number of studies disseminated to Team Canada Number of Canadian information booths Number of trade fairs facilitated Number of outgoing missions Number of incoming missions Number of requests from Canadian companies Number of requests from Mexican companies Number of reports disseminated Number of Canadian companies supported

An Integrated Approach to Performance Assessment

The performance indicators discussed in the previous sections provide several different perspectives of the performance issue. Different managers will be interested in different aspects at different times. For the team as a whole, it is the overall picture that matters; not necessarily a performance in any particular category. Nonetheless, each individual indicator is potentially an early warning sign of potential problems.

The project team recommends that the Trade and Economic Program develop an integrated approach to performance assessment, which incorporates the components listed here. The different teams should decide for themselves how much weight to put on each indicator. Ideally they should be combined to create a type of "scorecard" that gives quick reference to a broad range of performance indicators.

Implementation Plan

The new business model outlined in this guide represents a major change from previous work methods within the Trade and Economic Program. A systematic implementation plan will be needed to ensure that the transition proceeds smoothly. The project team recommends a four-phase implementation plan to be executed between November 1996 to December 1997. The first phase of this process is already in progress.

Phase 1: Setting Up

The first phase of the implementation began in November 1996. The goal was to develop a shared understanding of the need for change and the actions expected from the staff. All staff were made aware of the issues relating to roles, responsibilities, work practices and competency. Training needs were introduced as essential elements of the change initiative. This prepared them to fully participate in the rest of the implementation process.

The activities involved in this phase included:

- clarifying roles and setting objectives for each staff member;
- conducting language training;
- reviewing information needs and assessing database requirements; and
- reallocating the budget for the remainder of the fiscal year, including travel and hospitality budgets.

Phase 2: Making the Change

The second phase will last from February to March 1997. During this phase, the organization will adopt new work practices to put the new model into action. This includes an organization-wide shift towards a customer service orientation, leadership, teamwork, and information sharing. At the individual level, it includes activities to identify skill gaps and to begin plans for acquiring new competencies.

The activities involved in this phase include:

- developing guiding principles for the Trade and Economic Program;
- developing detailed work processes;
- conducting training sessions on database management software as well as on Canadian and Mexican government structures and international trade principles;
- conducting work sessions to define service standards and set up processes to implement them;
- developing and negotiating individual learning plans with each staff member;

- identifying the performance indicators to be used in the performance assessment system; and
- allocating resources for the next fiscal year.

Phase 3: Making it Work

From April to June 1997, implementation efforts will aim at consolidating the achievements from previous steps, and developing a shared commitment to these changes. As problems and concerns arise, they must be resolved through group problem solving, applying the principles and approaches established in the first two phases.

The activities involved in this phase include:

- workshops and meetings to define and implement support mechanisms for the core values of customer service orientation, leadership, team work and information sharing;
- training sessions to develop advanced competencies in trade policy, trade agreements, economics and trade finance;
- work sessions to review customer service, identify problems and determine corrective measures;
- implementation of individual learning plans;
- further development of a performance scorecard; and
- continuous refinement of service standards.

Phase 4: Consolidation

In September 1997, many new Canadian staff members will be joining the staff of the Trade and Economic Program. They will require orientation to understand the workings and underlying values of the new business model. The continuing staff will have the responsibility of "selling" the model to the new staff so that they can become fully-functional team members in the shortest possible time. These goals will remain the focus until December 1997.

The activities involved in this phase include:

- a group meeting with new staff members to communicate the guiding principles for the unit and the roles and responsibilities of each staff member;
- setting objectives for each new team member;
- orienting new staff to the mechanisms that support the core values of customer service orientation, leadership, teamwork and information sharing as well as further elaborating these values;
- developing and negotiating individual learning plans with each new staff member;
- continued implementation of individual learning plans; and
- training sessions to reinforce sectoral expertise and to develop knowledge of the export process and effective oral communication.

**Outstanding
Implementation Issues**

The new business model described in this guide will help to create the conditions for a productive work environment, based on a customer service orientation, leadership, teamwork and information sharing. The procedures recommended for performance assessment and implementation are designed to establish the conditions for continuous improvement. Potentially, the renewal framework presented here also has the potential for wider application within the Trade Commissioner Service.

But there are outstanding issues that were outside the scope of this project, that have a bearing on the success of the project. These will have to be dealt with by senior management in Mexico and at Headquarters, as the implementation proceeds. The solutions they create may also become part of a model for embassies in other countries.

This guide assumes that the staff of the Trade and Economic Program will be provided with clear definitions of who the clients are, what their needs are and which clients will receive priority. The Department needs to define what constitutes a legitimate request for services and, in situations of overload, what type of client takes precedence over another. Members of the Trade and Economic Program must be able to set priorities on the basis of an understanding of the philosophy of the Department.

Mexico Project — Implementation Plan				
Phase	Setting Up November to December 1996	Making the Change February to March 1997	Making it Work April to June 1997	Consolidation September to December 1997
Goals	<p>To continue to develop a shared understanding of the efforts and outcomes expected.</p> <p>To come to an agreement on the roles and resources required to succeed in reaching these outcomes.</p>	<p>To ensure that the organization adopts work practices that legitimize and favour a customer service orientation, strong leadership, teamwork, and effective sharing of information.</p> <p>To ensure that staff individually identify, plan and start acquiring the basic knowledge and competencies required for the redefined roles.</p>	<p>To consolidate the steps that were initiated previously and develop a shared commitment to these changes. As problems and concerns arise, difficulties need to be resolved using or adapting the approaches and mechanisms already set-up.</p>	<p>To orient the new Canadian staff members who will be coming on board at the beginning of this phase. It is essential to the success of the work done so far that they buy into the Mexican team's way of working.</p> <p>To maintain the commitment of the staff already in place to continue to value, promote and enhance these changes.</p>
Activities	<p>Hold workshops on role clarification and meetings to set objectives to be reached for each staff member.</p> <p>Conduct language training (on-going).</p> <p>Reallocate the budget for the remainder of the fiscal year, including monies for travel and entertainment.</p> <p>Develop databases to manage the networking of information.</p>	<p>Identify the guiding principles for the Program.</p> <p>Conduct detailed workflow analysis for priority work processes.</p> <p>Hold work sessions to define customer service, and identify and set up any additional processes required to implement it effectively.</p> <p>Develop and negotiate individual learning plans with each staff member.</p> <p>Allocate the resources for the next fiscal year respecting the new set-up and <i>modus operandi</i> of the Program.</p>	<p>Conduct work sessions to review customer service, and identify and set up any additional processes required to implement it effectively.</p> <p>Coordinate ongoing implementation of working plans.</p> <p>Give training sessions providing a basic understanding of trade policy, trade agreements, economics, and finance as it relates to trade.</p> <p>Conduct workshops and/or meetings to identify and implement the needed mechanisms to support a customer service orientation, strong leadership, teamwork and sharing of information.</p> <p>Continue developing balance score card.</p> <p>Continue the review of service standards.</p>	<p>Review with new staff members, in a group meeting, the guiding principles for the Program and of the roles and responsibilities of each person.</p> <p>Conduct work sessions to review customer service and identify and set up any additional processes required to implement it effectively.</p> <p>Set objectives to be reached for each new member.</p> <p>Orient them to the mechanisms that support the customer service orientation.</p> <p>Develop and negotiate individual learning plans with each new staff member.</p> <p>Maintain ongoing discussions on the implementation of strong leadership, teamwork and sharing of information.</p> <p>Coordinate ongoing implementation of individual learning plans.</p> <p>Conduct training sessions on sectoral expertise, knowledge of the export process, personal management and negotiation skills, and effective oral communication.</p>



Appendices

Appendix 1: Business Model

Appendix 2: Role Profiles

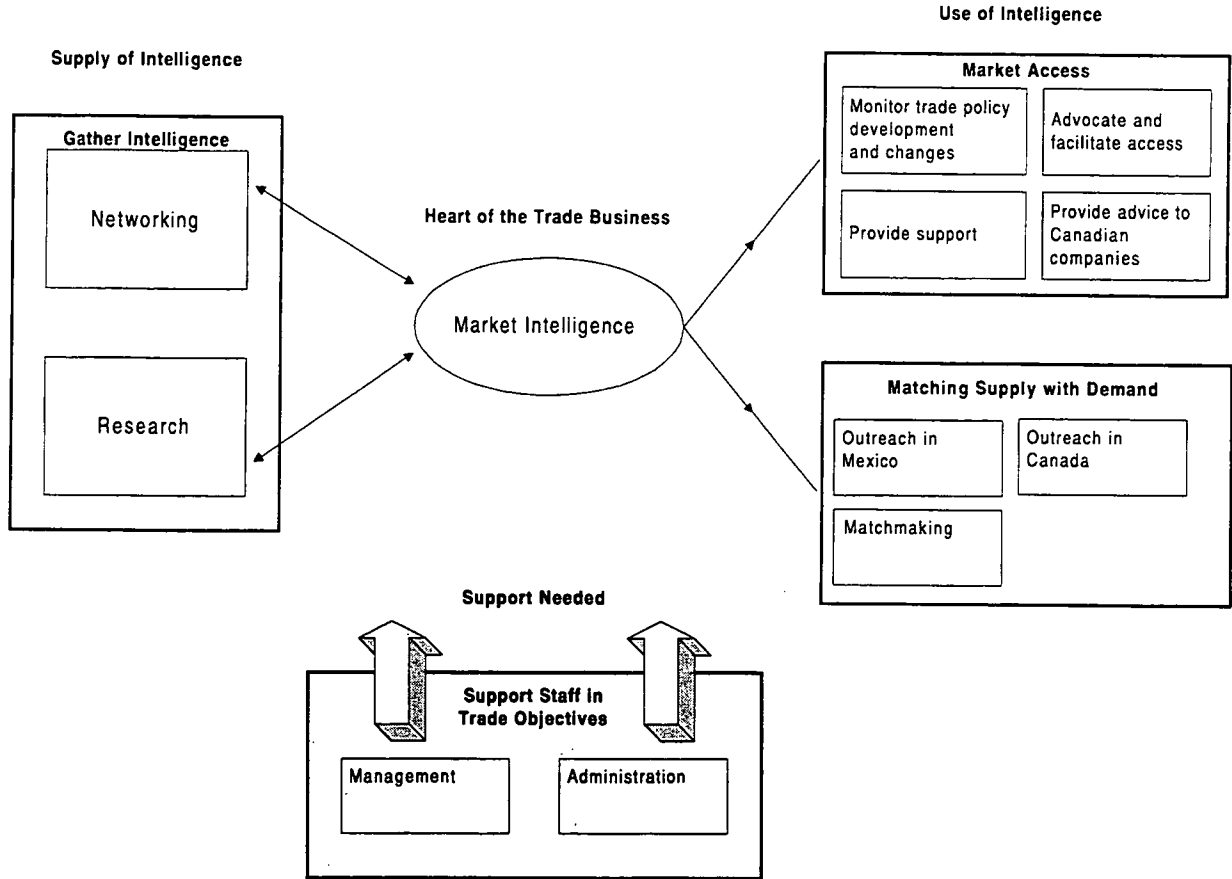
Appendix 3: Competency Profiles

Appendix 4: Learning Action Plan

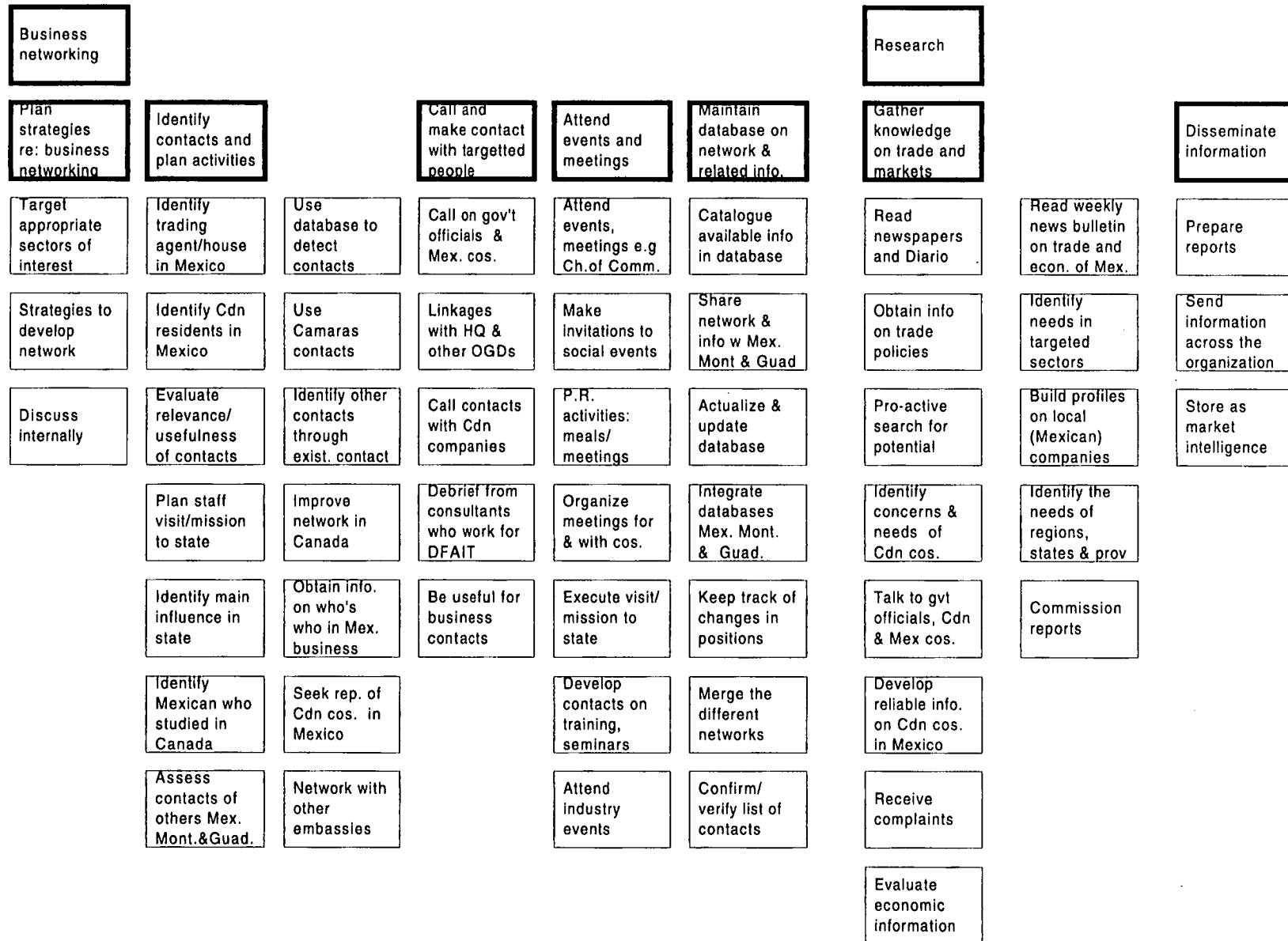
**Appendix 5: Structure: Trade and
Economic Program in Mexico**

Appendix 1: Business Model

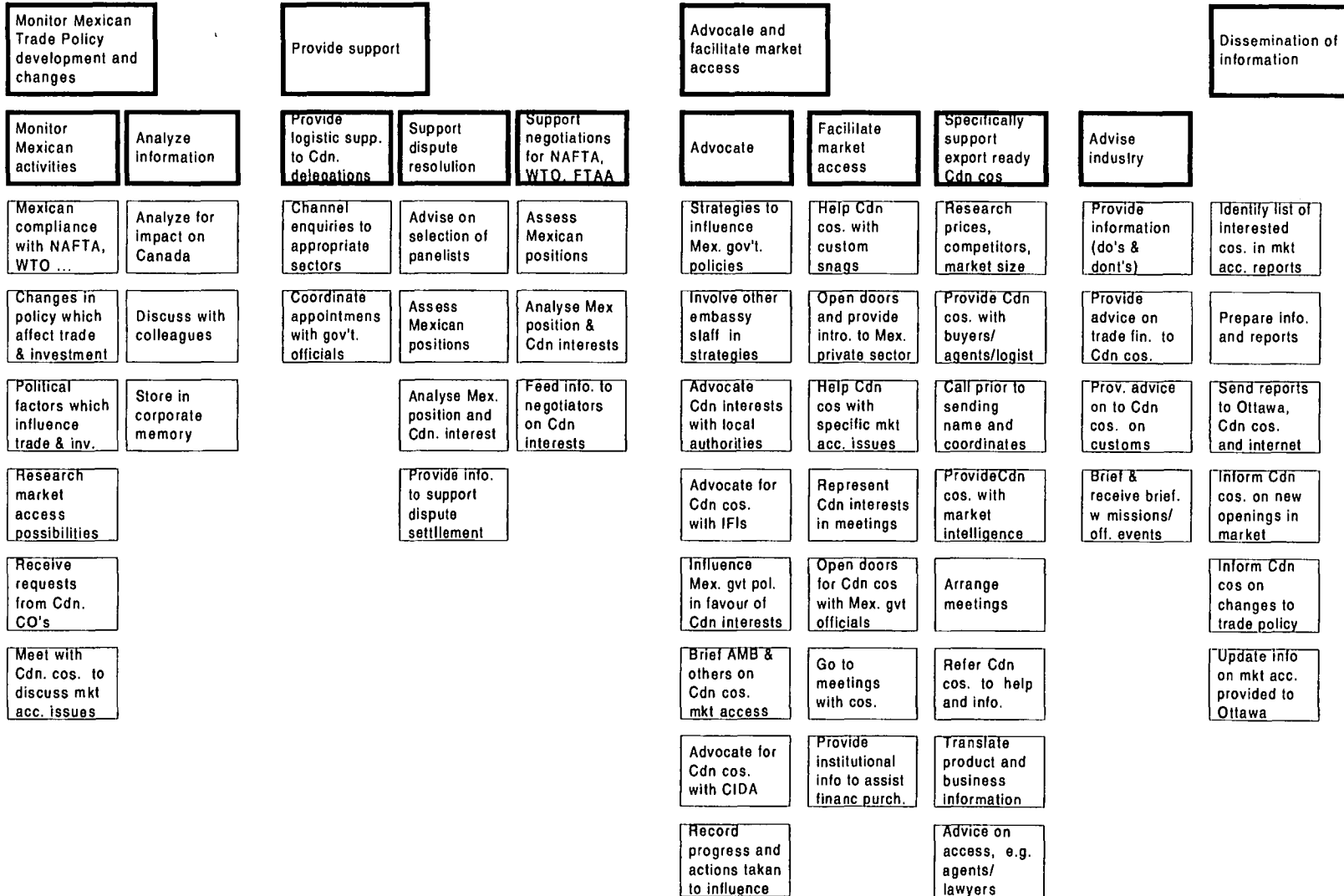
Business Processes



Business Process: Gather Intelligence Activities and Tasks



**Business Process: Market Access
Activities and Tasks**



**Business Process: Matching Canadian Export Capabilities (Supply) with Opportunities in Mexico (Demand)
Activities and Tasks**

Outreach in Mexico		Outreach in Canada			Matchmaking				Follow-up matchmaking activities	
Organize seminars & conferences	Deliver speeches to Mexican public	Disseminate information	Provide targeted information	Provide information via Team Canada	Disseminate information at large	Coordinate incoming missions to Canada	Coordinate outgoing missions to Mexico	Facilitate trade fairs	Identify potential matches	
Identify contacts	Identify opportunities to deliver speeches	Provide company profiles	Attend targeted seminars & conferences	Prepare and distribute opportunity studies	Tell people in Canada	Provide logistic travel details	Schedule appointment for Cdn cos	Recruit Cdn companies	Share requests to/ from MexCty/ Mont/Guad	Track results of matching activities
Provide logistics	Identify people to deliver speeches	Send Cdn info to potential buyers	Meet Cdn business persons	Obtain and analyze trade data to ident. opportunities	Speeches in Canada	Meetings with Cdn cos. gvt & industry rep	Provide logistic travel details	Prepare invitation list	Search databases	Call Mexican & Canadian cos. involved
Provide translation	Write speeches	Answer general enquiries		Write articles for Cdn export magazines	Network in the chamber of commerce	Identify cos.	Schedule appointment for Cnd priv. & gvt officials	Attend events	Ask Cdn cos. for reply to Mex requests	
Coordinate with other embassy units	Translate speeches	Send Cdn directories to main Mex. associations	Identify Mex. opportunities and relay to Cdn cos	Information on IFI from the embassy	Promote the consulate mandate	Coordinate with gov't officials	Schedule appointment with Mexican companies	Provide translation	Contact IBOC	
Coordinate with customs	Deliver speeches	Send promo material to Mexican contacts	Develop/relay knowledge on competitors	Provide Mexican company profiles		Accompany missions and provide support	Identify companies	Propose side events to participants	Contact colleagues Demand/ Supply	
Make presentation at seminars/ events		Promote the consulate mandate	Call or fax Cdn cos. directly	Work with provinces		Write reports	Prepare press release	Prepare information kits / documents	Contact Industry Associations	
			Answer direct enquiries	Request for information on Mex. eco. & markets		Maintain contacts with Mex. & Cdn participants		Organize press conferences	Escort Cdn business person to meetings	
						Coordinate with Mexican gvt officials		Brief & give speeches at events	Detect bids and refer to Cdn cos.	
								Provide logistics for facilities	Use SIMPLEX to detect bid opportunities	Scan media to identify opportunities

Business Process: Support Trade Objectives
Activities and Tasks

Management		Administration
Advise on strategies	Set limits as necessary (DO's&DONT's)	Improve and maintain equip. & facilities (H/W, S/W)
Facilitate discussions & allow for input in mgt process	Automate repetitive tasks	Back-up systems
Clarify and deal with Ottawa	Set priorities	Ensure & provide an effective filing system
Keep updated status of customers & services to cust	Allocate workload in an equitable fashion	Obtain info from Embassy re: Systems (PCs/network)
Mobilize resources when needed	Follow-up on activities	
Obtain and allocate budgets for trade activities	Share information internally	
Provide feedback to staff	Identify training needs	
Back-ups to different activities (staff)	Ensure frequent meetings are conducted	
Assess effectiv. of the organiz. & continual improvements	Set-up business information systems	

Appendix 2: Role Profiles

Role Profile: Minister Counsellor

Role Summary

The Minister Counsellor in the Commercial and Economic Section of the Canadian Embassy will promote and protect the commercial and economic interests of Canadians in Mexico; will manage the resources of the Commercial and Economic Section responsible for trade promotion and trade policy in Mexico City, Guadalajara and Monterrey; and will act as Chargé d'Affaires of the Embassy in the absence of the Ambassador.

Organization Structure

Immediate supervisor:	Ambassador
Your position title:	Minister Counsellor

Major Responsibilities

- Promotes and protects the commercial and economic interests of Canadians in Mexico:
 - by developing and recommending policies and strategies for furthering Canada's commercial and economic interests, ensuring that these are consistent with broad government objectives;
 - by supporting Team Canada to ensure that their efforts are coordinated to enhance Canadian interests in Mexico;
 - by representing the Canadian government on high-level Mexican missions to Canada, as well as supporting Canadian Ministers responsible for commercial and economic development of the Canadian business sectors;
 - by identifying current market-access issues in the host country that will or can have an impact on the Canadian business community, and communicating relevant information and analysis to appropriate business interests in Canada;
 - by planning and implementing strategies to develop contacts with appropriate sources of intelligence and support in the Canadian and Mexican industrial, governmental and political arenas related to trade;
 - by attending events and meetings with the objective of making new contacts and/or enhancing Canada's visibility as a viable trade partner;
 - by preparing and/or making speeches to be delivered on the products, capabilities and advantages of trade with Canada;

- by planning and implementing initiatives directed at identifying new demands and opportunities in Mexico, identifying related Canadian export capabilities and fostering links between them that will promote Canadian business interests;
- by supporting and enhancing the effectiveness of Canadian visitors through briefing them on related issues and advising them on appropriate business approaches with their Mexican counterparts;
- by providing Canadian companies with intelligence and appropriate contacts such as buyers, agents, lawyers or other professional services representatives; and
- by cooperating with other posts on regional trade promotion programs.
- Manages the resources of the Commercial and Economic Section responsible for trade promotion and trade policy in Mexico City, Guadalajara and Monterrey:
 - by developing Post priorities and programs aimed at promoting the export of Canadian goods and services to Mexico;
 - by identifying resource requirements and allocating them to programs or activities;
 - by identifying, recruiting and developing the required competencies to support the Program’s mission and by acting as mentor to key personnel;
 - by providing leadership, including a shared understanding of the mission, values, rules and procedures that will provide the environment for high performance, as well as direction on the nature, timing and extent of the unit’s initiatives towards its goals;
 - by making recommendations to alter or drop specific trade promotion programs or to strengthen alternative programs to better exploit market potential; and
 - by maintaining effective working relationships with other departments within the Embassy.
- Acts as Chargé d’Affaires of the Embassy in the absence of the Ambassador.

Role Profile: Trade Commissioner

Role Summary

The Trade Commissioner in the Trade and Economic Program of the Canadian Embassy or the consulates in Monterrey and Guadalajara will provide direction and contacts within the Canadian export community to support the trade objectives of the Program; will act as the official Canadian representative in trade matters in front of Mexican officials and the business community; will lead and support a team responsible for the implementation of trade policy and trade promotion objectives in one or more trade sectors; and in some cases, will provide functional direction to all staff of the Program in areas such as Trade Promotion or Trade Policy.

Organization Structure

Immediate supervisor:	Minister Counsellor
Your position title:	Trade Commissioner
Titles of other position(s) reporting to your immediate supervisor:	

Major Responsibilities

- Sets-up and maintains a comprehensive and effective network of contacts in specific sectors, in order to provide better Canadian access to Mexican markets and timely intelligence for the penetration of these markets:
 - by planning and implementing strategies to develop contacts with appropriate sources of intelligence and support in the Canadian and Mexican industrial, governmental and political arenas related to their sectors;
 - by maintaining links with these contacts through periodic, planned activities;
 - by attending events and meetings with the objective of making new contacts and/or enhancing Canada's visibility as a viable trade partner;
 - by preparing and/or making speeches to be delivered on the products, capabilities and advantages of trade with Canada; and
 - by regularly updating the information and intelligence systems set up to disseminate the information and intelligence gleaned from networking activities.
- Assesses the local situation and makes recommendations on relevant trade policy and promotion issues to Canadian authorities and clients:
 - by reviewing, studying and interpreting local financial forecasts, business and government publications;
 - by initiating and conducting general and specific market studies and surveys and statistical summaries relating to Canadian trade in relevant sectors;
 - by researching office records, trade publications and surveys;
 - by identifying current market access issues in their sectors that will or can have an impact on the Canadian business community, and communicating relevant information and analyses to appropriate business interests in Canada; and

- by making recommendations to alter or drop specific trade promotion programs or to strengthen alternative programs to better exploit market potential.
- Matches Canadian exports capabilities to opportunities in the Mexican markets:
 - by identifying new demands and growing potential for Mexican goods and services;
 - by studying Canadian export capabilities and relating them to local market needs and requirements;
 - by collating import and/or export statistics gathered from various sources to maintain up-to-the-minute awareness of local, regional and Canadian conditions;
 - by recommending, planning and assisting missions and visits from Canadians firms who have potential in the local markets;
 - by supporting and enhancing the effectiveness of Canadian visitors through gathering background information, briefing them on related issues, advising them on appropriate business approaches with Mexican counterparts, and acting as liaison for appointments and visits;
 - by cooperating with other posts on regional trade promotion programs; and
 - by identifying and monitoring international financial institutions and private sector projects.
- Supports specific exporters who are poised to enter the Mexican market:
 - by coordinating responses to inquiries received from the Canadian exporting community;
 - by providing backup services to Canadian exporters planning on participating in trade fairs and other events appropriate to marketing Canadian products; and
 - by providing Canadian companies with intelligence and contacts such as buyers, agents, lawyers or other professional service representatives.
- Supports the Mexican staff in the implementation of the objectives of the Trade and Economic Program:
 - by assigning responsibilities to team members in their sectors;
 - by clearly defining objectives and timelines to members of their team;
 - by providing team members with a sense of clear direction;
 - by assessing the strengths and development needs of team members and making the appropriate training recommendations to appropriate functional coordinators; and
 - by providing clear, thorough and timely feedback to team members on their performance.

Role Profile: Commercial Officer

Role Summary

The Commercial Officer in the Commercial and Economic Section of the Canadian Embassy in Mexico City and in the consulates in Monterrey and Guadalajara promotes Canadian exports of goods and services to Mexico by providing expertise on the Mexican context and perspective in specific trade sectors; by identifying and fostering opportunities for Canadian exporters of goods and services in these same sectors of the Mexican market; and by maintaining contacts within the Mexican and Canadian business communities to ensure the stability of a network in these sectors.

Organization Structure

Immediate supervisor:	Trade Commissioner
Your position title:	Commercial Officer
Titles of other position(s) reporting to your immediate supervisor:	Trade System Specialist

Major Responsibilities

- Sets up and maintains a comprehensive and effective network of contacts in order to provide better Canadian access to Mexican markets and timely intelligence for the penetration of these markets:
 - by identifying and maintaining links with appropriate sources of intelligence and support primarily in the Mexican industrial, governmental, political arenas;
 - by becoming fully familiar with local business methods and practices, and government regulations;
 - by attending events and meetings with the objective of making new contacts and/or enhancing Canada's visibility as a viable trade partner;
 - by preparing speeches to be delivered and articles for publications on the products, capabilities and advantages of trade with Canada;
 - by maintaining comprehensive and up-to-date information on contacts made and interactions entered upon on behalf of the Trade and Economic Program or its clients.
- Assesses the local situation and makes recommendations on relevant policy and trade issues to Canadian authorities:
 - by reviewing, studying and interpreting local financial forecasts, business and government publications;
 - by initiating and conducting general and specific market studies, surveys and statistical summaries relating to Canadian trade in relevant sectors;
 - by researching office records, trade publications and surveys;
 - by identifying current market access issues in their sectors that will or can have an impact on the Canadian business community, and writing up relevant information and analysis for use by appropriate business interests; and

- by making recommendations to alter or drop specific trade promotion programs or to strengthen alternative programs to better exploit market potential.
- Matches Canadian export capabilities to opportunities in the Mexican markets:
 - by identifying new demands and growing potentials for Mexican goods and services;
 - by studying Canadian export capabilities and relating them to local market needs and requirements;
 - by collating import/export statistics gathered from various sources to maintain up to the minute awareness of local, regional and Canadian conditions;
 - by recommending, planning and assisting missions and visits by Canadians firms who have potential in the local markets;
 - by supporting and enhancing the effectiveness of Canadian visitors through gathering background information, briefing them on related issues, advising them on appropriate business approaches with their Mexican counterparts, acting as liaison for appointments and visits, and acting as interpreters when warranted;
 - by identifying, proposing and staffing trade fairs when they are viable marketing tools for Canadian products;
 - by cooperating with other Trade and Economic Programs on regional trade promotion programs; and
 - by identifying and monitoring international financial institutions and private sector projects, such as World Bank, InterAmerica Development Bank and private sector projects.
- Supports specific exporters who are poised to enter the Mexican market:
 - by coordinating responses to inquiries received from the Canadian exporting community;
 - by providing backup services to Canadian exporters planning on participating in trade fairs and other events appropriate to marketing Canadian products; and
 - by providing Canadian companies with contacts such as buyers, agents, lawyers or other professional service representatives.

Role Profile: Trade System Specialist

Role Summary

The Trade System Specialist in the Commercial and Economic Section of the Canadian Embassy and in the consulates in Monterrey and Guadalajara provides information as well as systems and logistical support to the officers of the Trade and Economic Program. This is accomplished mainly through setting up and maintaining a variety of documentation and trade information systems; setting up and coordinating missions, visits or training programs; answering general inquiries from clients; and acting as translator and/or interpreter when required.

Organization Structure

Immediate supervisor:	Trade Commissioner
Your position title:	Trade System Specialist
Titles of other position(s) reporting to your immediate supervisor:	Commercial Officer

Major Responsibilities

- Sets up and maintains documentation and trade information systems:
 - by maintaining an information base of government and private contacts in specific sectors;
 - by maintaining a filing system for the correspondence produced within the work group and by maintaining individual chronological records of such correspondence;
 - by compiling and preparing invoices from contractors and other suppliers along with the necessary documentation to obtain payment from the Financial Section;
 - by collecting, coordinating and disseminating information to staff;
 - by distributing incoming correspondence;
 - by creating, circulating and keeping a series of documents for public and office use for improving the performance of the Trade and Economic Program;
 - by acquiring and upgrading knowledge of word processing, database and spreadsheet computer programs to assist in the manipulation, extraction and production of texts for the Program;
 - by advising officers and other staff on how to better utilize computer programs available to the Trade and Economic Program; and
 - by collecting, inputting and handling information to complete a quarterly report on Program activities.
- Sets up and coordinates missions, visits or training programs:
 - by becoming familiar with and maintaining links with government and business contacts;
 - by developing a knowledge of Canadian suppliers of goods and services and Canadian departments and agencies;
 - by persuading government and business officials to be part of a program;

- by coordinating logistical arrangements for incoming missions, delegations and Embassy receptions; and
- by arranging appointments, travel and hotel reservations for Canadian visitors, business persons and government officials.
- Answers inquiries from clients:
 - by researching and obtaining information from Mexican government and business officials, as well as trade and government publications on market access, regulatory matters, business, economic and market conditions;
 - by responding to public inquiries or directing them to the appropriate officer if required;
 - by preparing responses to local inquiries for information on Canadian suppliers and other general information;
 - by locating and extracting information from a number of sources for use in answering correspondence and telephone inquiries and/or for incorporation into the body of typed material;
 - by preparing and transmitting faxes; and
 - by editing and processing into a final format drafts of memos, reports and letters;
 - by preparing speeches to be delivered and articles for publication on the products, capabilities and advantages of trade with Canada.
- Acts as translator and interpreter:
 - by drafting communications in English, Spanish and French for communications with Mexican and Canadian business as well as government contacts, including letters for the Ambassador's signature;
 - by translating speeches for the Ambassador and other Program officials; and
 - by acting as interpreter for individual Canadian businessmen, groups and Ministerial missions.

Appendix 3: Competency Profiles

Trade Commissioner

(including Minister
Counsellor)

Customer Service Competencies

Building Partnerships

To interact with customers, counterparts and other groups in a manner which furthers the organization's ability to provide services, through:

- sharing information with all relevant groups;
- treating customers and their counterparts as partners with common goals; and
- auditing the common ground between groups in order to gain their cooperation in mutually beneficial endeavours.

Creating Relationships

To invest in relationships that last beyond the delivery of services through:

- enjoying the interaction with customers as an integral part of the work;
- taking personal responsibility for helping customers solve their problems; and
- creating relationships with customers that are based on trust.

Marketing Products and Services

To represent the services and products of Canadian customers to Mexican counterparts by:

- matching Mexican needs with current products and services;
- using effective selling techniques to convince Mexican counterparts of the effectiveness of relevant products and services;
- suggesting new Canadian products and services to target unmet needs.

Delivering Services

To provide customers with services that meet or exceed their expectations by:

- providing prompt, efficient and personalized service;
- serving customers with care and attention; and
- going out of one's way to ensure that the customer's needs are met or exceeded.

Dealing with Crises

To respond to crisis situations and work towards resolving problems by:

- identifying potential crisis situations early-on;
- acting quickly to deal with a crisis;
- solving potential problems and negative outcomes in a proactive manner, where possible;
- alerting others who may need to respond quickly to the crisis; and
- learning from the experience so that similar situations can be avoided.

Following-Up with Customers

To stay involved with and solicit ongoing feedback from customers by:

- keeping customers up-to-date about decisions that affect them;
- seeking the comments, criticisms and involvement of customers; and
- adjusting services based on their feedback.

Technical Competencies

Networking

To cultivate an informal network which may help to “get things done” through:

- developing contacts with people within the Embassy and consulates, within the Canadian and Mexican governments and within the Canadian and Mexican business communities;
- using networks as a source of information and support; and
- maintaining contacts through periodic visits, telephone calls, correspondence, and attendance at meetings and social events.

Demonstrating Technical and/or Professional Expertise

To act as a professional and/or technical resource to customers by:

- keeping up-to-date knowledge in specialist priority sector areas;
- keeping up-to-date market information in priority sector areas; and
- translating technical jargon to common language.

Making Business Decisions

To use business-related data to report effective and timely market information and intelligence to Canadian business communities and government officials by:

- systematically gathering relevant business information;
- identifying the strengths and weaknesses of a particular business line;
- recognizing opportunities or threats and acting on them rapidly; and
- using business facts collected in daily decision-making.

Using Business Acumen

To promote long-term business success by:

- identifying critical success factors in different situations;
- taking into consideration the impact of external factors on organizations, such as demands, marketplace forces and concerns of the general public before counselling customers; and
- learning from experience and applying these lessons to making support for customers more viable.

Using Financial Information

To understand and apply financial data in a way which furthers your goals by:

- understanding the meaning and implication of key financial performance measures; and
- using financial information and other analytical tools to evaluate threats and opportunities for customers.

Working with Computer Technology

To use computer technology to ensure a high level of efficiency in accomplishing work by:

- using computer software applications appropriate to the job function such as word processing, graphics, Lotus Notes®, e-mail, work-related Internet resources, etc.

Influencing

To gain support and buy-in from others by:

- actively attempting to persuade, convince or impress others;
- targetting efforts towards the decision makers in a given situation;
- asserting one's viewpoint in a way that results in acceptance, agreement or behaviour change; and
- influencing individuals in the absence of direct authority.

Negotiating Winning Solutions

To create mutually acceptable solutions by:

- actively trying to understand the positions of others;
- persuading others to review their demands or change their original position;
- assuring all parties that a fair solution will be attained; and
- identifying options that are superior to the original ones held.

Handling Situations with Diplomacy

To maintain positive relationships by:

- establishing and sustaining good relationships early-on with people at all levels;
- creating an atmosphere that puts everyone at ease;
- promoting harmony and consensus; and
- tactfully reconciling disagreements to avoid potential conflicts.

Thinking Competencies

Analyzing Problems

To systematically analyze problems, identify key issues and draw logical conclusions by:

- breaking problems into constituent parts and differentiating key elements from those that are irrelevant or trivial;
- making accurate use of logic;
- organizing the elements of a situation and making systematic comparisons of different features or aspects; and
- drawing sound inferences from available information.

Applying One's Cognitive Capability

To apply one's maximum capability to deal with information of increasing complexity by:

- identifying points or issues which are relevant to the topic or situation;
- linking two or more related points or issues to reach a conclusion or decision;
- identifying cause-effect relationships which predict consequences and future courses of events; and
- identifying interconnections between two or more cause-effect relationships which create an hypothesis or model to account for several aspects of a situation or event.

Identifying the Links

To recognize patterns, trends or causes of events and develop explanations for these situations by:

- identifying connections between situations that are not obviously related.

Committing to Action

To make rational, realistic and sound recommendations for action by:

- considering all the facts and alternatives available;
- making decisions based on limited information when necessary;
- reaching sound conclusions based on consideration of the situation, the issues and the persons involved; and
- committing to actions in a timely fashion.

Communication Competencies

Communicating Orally

To communicate ideas and information orally in a way that ensures the messages are understood by others through:

- using business appropriate language which is free of distracting colloquialisms and offensive language;
- presenting information in a clear and concise way;
- adapting the content and style of communication for the audience; and
- speaking in a compelling manner which holds the attention of others, both in group and one-on-one situations.

Listening to Others

To actively attend to and convey an understanding of the comments and questions of others through:

- providing opportunities for others to speak;
- listening to obtain additional information or further instructions;
- listening attentively for the messages being conveyed; and
- recalling key points and taking them into account in one's own communications.

Communicating in Writing

To communicate ideas and information in writing in a way that ensures that the messages are understood by others through:

- preparing written responses to structured formats such as standard forms, memos or letters;
- presenting written information in a clear and concise way;
- adapting the content and style of written communication for the audience; and
- writing in a compelling manner which holds the readers attention.

Selling the Message

To market key points effectively to an audience through:

- using skills essential for public speaking, such as voice projection, eye contact, non-verbal communication;
- responding to a variety of contexts, such as presentations, media interviews or regulatory hearings with appropriate replies and materials;
- convincing an audience — including one that is initially resistant to or uninformed — regarding the message being communicated; and
- responding appropriately to on-the-spot questions, even when specific responses have not been scripted beforehand.

Communicating in One's Second or Third Official Language

To communicate in one's second or third official language at an appropriate level (as the need arises) by:

- reading documents such as forms, memos, letters and reports;
- producing and/or translating documents such as memos, letters and reports; and
- listening to and speaking to others.

Organization Competencies

Planning the Work

To define work goals and formulate specific tasks and milestones by:

- clearly defining objectives, action steps, responsibilities and timelines;
- considering both short-term requirements and long-term solutions and directions; and
- producing detailed, realistic and achievable project plans.

Measuring Progress

To monitor performance and results and keep the work on track by:

- gathering information about work activities and external conditions affecting the work;
- checking on the progress and quality of work;
- making modifications in plans where necessary; and
- evaluating the performance of individuals.

Managing a Team

To orient a team towards high productivity by:

- providing team members with a clear sense of direction;
- taking responsibility to organize resources and steer team members towards successful task accomplishment;
- providing the team with practical tools to accomplish the work; and
- representing the team and defending its integrity to others in the organization.

Motivating the Team

To maximize team members' performance through:

- inspiring a positive attitude towards work by modelling cooperative, task-oriented behaviour in one's own actions and by arousing a strong desire to succeed among team members.

Developing Talent

To ensure all team members' development keeps pace with demands of the workplace by:

- accurately assessing the strengths and developmental needs of team members;
- seeking to improve team members' skills and talents;
- providing appropriate training opportunities; and
- identifying assignments which challenge abilities and encourage development.

Providing Performance Feedback

To facilitate the performance of each team member through:

- providing clear, thorough and timely feedback on work performance in formal performance appraisals and in day-to-day situations;
- recognizing and rewarding performance that meets or exceeds performance standards;
- providing constructive criticism and helpful suggestions to correct poor performance; and
- taking appropriate action to remove non-performers when suggested improvements in performance are not realized.

Leadership Competencies

Being Inspiring

To generate a sense of purpose for the work done by the organization through:

- instilling enthusiasm, loyalty and commitment among team members at all levels of the organization;
- inspiring, motivating and guiding others toward organizational goals and objectives; and
- setting an example for others by behaving in ways that are consistent with espoused beliefs and values and the organization's vision and direction.

Using Organizational Know-How

To be aware of organizational practices and priorities, and to be able to position plans and strategies accordingly by:

- being attuned to internal "politics" and alert to changing dynamics within organization;
- forging links with other departments and establishing useful supportive networks;
- having knowledge of and experience in a range of different functions; and
- taking account of all functions when developing strategy and plans.

Interpersonal Competencies

Respecting Others

To develop and maintain smooth, cooperative working relationships by:

- showing consideration, concern and respect for others;
- actively trying to understand their thoughts, concerns or feelings even when these are unexpressed or poorly expressed;
- demonstrating interest in others' opinions; and
- being sympathetic to and tolerant of differing needs and viewpoints.

Being a Team Player

To contribute to group objectives in a team environment through:

- cooperating and interacting well with others;
- working collaboratively as opposed to competitively with others; and
- acknowledging diverse opinions, addressing relevant concerns and working towards consensual solutions that enhance the output of the team.

Self-Management Competencies

Initiating

To go beyond the routine demands of the job by:

- taking personal responsibility for the outcome of events;
- working independently to perform one's duties;
- investigating various sources of information;
- taking action beyond explicit requests; and
- seeking opportunities to influence events and originate action.

Managing Self Learning

To maintain an active interest in personal learning and self-development by:

- seeking feedback on performance;
- evaluating own strengths and weakness;
- maintaining and updating own career goals;
- modifying behaviour based on feedback or self-analysis of past mistakes, experience and personal areas for improvement; and
- participating fully in formal training programs.

Commercial Officer

Customer Service Competencies

Building Partnerships

To interact with customers, counterparts and other groups in a manner which furthers the organization's ability to provide services through:

- sharing information with all relevant groups;
- treating customers, counterparts as partners with common goals; and
- elucidating the common ground between groups in order to gain their cooperation in mutually beneficial endeavours.

Creating Relationships

To invest in relationships that last beyond the delivery of services through:

- enjoying the interaction with customers as an integral part of the work;
- taking personal responsibility for helping customers solve their problems; and
- creating relationships with customers that are based on trust.

Marketing Products and Services

To represent the services and products of Canadian customers to Mexican counterparts by:

- matching Mexican needs with current products and services;
- using effective selling techniques to convince Mexican counterparts of the effectiveness of relevant products and services; and
- suggesting new Canadian products and services to target unmet needs.

Delivering Services

To provide customers with services that meet or exceed their expectations by:

- providing prompt, efficient and personalized service;
- serving customers with care and attention; and
- going out of one's way to ensure that customer needs are met or exceeded.

Dealing with Crises

To respond to crisis situations and work towards resolving related problems by:

- identifying potential crisis situations early-on;
- acting quickly to deal with a crisis;
- solving potential problems and negative outcomes in a proactive manner, where possible;
- alerting others who may need to respond quickly to the crisis; and
- learning from the experience so that similar situations can be avoided.

Following-Up with Customers

To stay involved with and solicit ongoing feedback from customers by:

- keeping customers up-to-date about decisions that affect them;
- seeking the comments, criticisms and involvement of customers; and
- adjusting services based on their feedback.

Technical Competencies

Networking

To cultivate an informal network which may help to “get things done” through:

- developing contacts with people within the Embassy and the consulates, within the Canadian and Mexican governments and within the Canadian and Mexican business communities;
- using networks as a source of information and support; and
- maintaining contacts through periodic visits, telephone calls, correspondence, and attendance at meetings and social events.

Demonstrating Technical and/or Professional Expertise

To act as a professional and/or technical resource to customers by:

- keeping up-to-date knowledge in specialized priority sector areas;
- keeping up-to-date market information in priority sector areas; and
- translating technical scientific jargon to common language.

Making Business Decisions

To use business-related data to report effective and timely market information and intelligence to Canadian business communities and government officials by:

- systematically gathering relevant business information;
- identifying the strengths and weaknesses of a particular priority sector areas;
- recognizing opportunities or threats and acting on them rapidly; and
- using business facts collected in daily decision-making to support Canadian customers.

Using Financial Information

To understand and apply financial data in a way which furthers your goals by:

- understanding the meaning and implication of key financial performance measures; and
- using financial information and other analytical tools to evaluate threats and opportunities for future Canadian business expansion in Mexico.

Working Within the System

To advise on local methods, practices, policies, rules, regulations and laws appropriately through:

- making recommendations on how to use these as tools to achieve intended results.

Working with Computer Technology

To use computer technology to ensure a high level of efficiency in accomplishing work by:

- using computer software applications appropriate to the job function such as word processing, graphics, Lotus Notes®, e-mail, Internet resources, etc.

Influencing

To gain support and buy-in from others by:

- actively attempting to persuade, convince or impress others;
- targetting efforts towards the decision makers in a given situation;
- asserting one's viewpoint in a way that results in acceptance, agreement or behaviour change; and
- influencing individuals in the absence of direct authority.

Handling Situations with Diplomacy

To maintain positive relationships by:

- establishing and sustaining good relationships early-on with people at all levels;
- creating an atmosphere that puts everyone at ease;
- promoting harmony and consensus; and
- tactfully reconciling disagreements to avoid potential conflicts.

Thinking Competencies

Analyzing Problems

To systematically analyze problems, identify key issues and draw logical conclusions by:

- breaking problems into constituent parts and differentiating key elements from the irrelevant or trivial;
- making accurate use of logic;
- organizing the elements of a situation and making systematic comparisons of different features or aspects; and
- drawing sound inferences from available information.

Applying One's Own Cognitive Capabilities

To apply one's maximum capability to deal with information of increasing complexity by:

- identifying points or issues which are relevant to the topic or situation;
- linking two or more related points or issues to reach a conclusion or decision;
- identifying cause-effect relationships which predict consequences and future courses of events; and
- identifying interconnections between two or more cause-effect relationships which create an hypothesis or model to account for several aspects of a situation or event.

Identifying the Links

To recognize patterns, trends or causes of events and develop explanations for these situations by:

- identifying connections between situations that are not obviously related.

Committing to Action

To make rational, realistic and sound recommendations for action by:

- considering all the facts and alternatives available;
- making decisions based on limited information when necessary;
- reaching sound conclusions based on consideration of the situation, the issues and persons involved; and
- committing to actions in a timely fashion.

Communication Competencies

Communicating Orally

To communicate ideas and information orally in a way that ensures the messages are understood by others through:

- using business appropriate language free of distracting colloquialisms and offensive language;
- presenting information in a clear and concise way;
- adapting the content and style of communication for the audience; and
- speaking in a compelling manner which holds others' attention, both in group and in one-on-one situations.

Listening to Others

To actively attend to and convey an understanding of the comments and questions of others through:

- providing opportunities for others to speak;
- listening to obtain additional information or further instructions;
- listening attentively for the messages being conveyed; and
- recalling key points and taking them into account in one's own communications.

Communicating in Writing

To communicate ideas and information in writing in a way that ensures that the messages are understood by others through:

- preparing written responses to structured formats such as standard forms, memos or letters;
- assisting in the preparation of speeches, news releases, bulletins, written reports and articles for publication;
- presenting written information in a clear and concise way;
- adapting the content and style of written communication for the audience; and
- writing in a compelling manner which holds the readers attention.

Communicating in One's Second or Third Official Language

To communicate in one's second or third official language at an appropriate level (as the need arises) by:

- reading documents such as forms, memos, letters and reports;
- producing and/or translating documents such as memos, letters and reports; and
- listening and speaking to others.

Interpersonal Competencies

Respecting Others

To develop and maintain smooth, cooperative working relationships by:

- showing consideration, concern and respect for others;
- actively trying to understand their thoughts, concerns or feelings even when these are unexpressed or poorly expressed;
- demonstrating interest in others' opinions; and
- being sympathetic to and tolerant of differing needs and viewpoints.

Sharing Information

To solicit and provide information by:

- demonstrating a genuine interest in receiving information from others;
- encouraging others to offer their ideas or opinions;
- readily sharing information regarding significant events, situations affecting others; and
- consulting with individuals before making changes that involve them personally.

Being a Team Player

To contribute to group objectives in a team environment through:

- cooperating and interacting well with others;
- working collaboratively as opposed to competitively with others;
- acknowledging diverse opinions, addressing relevant concerns; and
- working towards consensual solutions that enhance the output.

Self-Management Competencies

Getting the Job Done

To achieve desired results through:

- accepting ownership of projects;
- acting in a decisive and committed way to ensure that key objectives are met on time;
- establishing priorities, identifying critical tasks, pushing projects forward; and
- remaining accountable throughout the project and delivering on commitments.

Managing Self Learning

To maintain an active interest in personal learning and self-development by:

- seeking feedback on performance;
- evaluating one's own strengths and weakness;
- maintaining and updating one's own career goals;
- modifying one's behaviour based on feedback or self-analysis of past mistakes, experience and personal areas for improvement; and
- participating fully in formal training programs.

Demonstrating Flexibility

To adjust one's behaviour to meet the demands of a changing environment by:

- remaining productive through periods of transition;
- adapting quickly to deal with emerging opportunities or risks;
- working effectively with a variety of situations, individuals or groups;
- accepting ambiguity and uncertainty in the environment; and
- embracing new methods of working.

Initiating

To go beyond the routine demands of the job by:

- taking personal responsibility for the outcome of events;
- working independently to perform one's duties;
- investigating various sources of information;
- taking action beyond explicit requests; and
- seeking opportunities to influence events and originate action.

Trade System Specialist

Technical Competencies

Networking

To cultivate an informal network which will help to get things done through:

- developing contacts with local government officials, businessmen and associations; and
- using networks as a source of information and support.

Working Within the System

To advise on local methods, practices, policies, rules, regulations and laws appropriately through:

- making recommendations on how to use these as tools to achieve intended results; and
- applying procedures in a way that is efficient and effective for customers.

Working with Computer Technology

To use computer technology to ensure a high level of efficiency in accomplishing work by:

- using computer software applications appropriate to the job function such as word processing, graphics, Lotus Notes®, e-mail or work-related Internet resources; and
- maintaining information bases such as government and private contacts.

Performing Office Tasks

To perform a wide range of office tasks with a high level of efficiency by:

- classifying, sorting and filing correspondence, records and other data from many sources;
- entering and/or verifying information for accuracy;
- preparing and transmitting faxes;
- compiling and preparing invoices; and
- accessing information quickly and accurately.

Coordinating Arrangements

To coordinate arrangements for missions, training programs and visitors through:

- making logistical arrangements;
- persuading Mexican government and business officials to take part; and
- developing programs of meetings and appointments.

Handling Situations with Diplomacy

To maintain positive relationships by:

- establishing and sustaining good relationships early-on with people at all levels;
- creating an atmosphere that puts everyone at ease;
- promoting harmony and consensus; and
- tactfully reconciling disagreements to avoid potential conflicts.

Customer Service Competencies

Creating Relationships

To invest in relationships that last beyond the delivery of services through:

- enjoying the interaction with customers as an integral part of the work;
- taking personal responsibility for helping customers solve their problems; and
- creating relationships with customers based on trust.

Delivering Services

To provide customers with services that meet or exceed their expectations by:

- providing prompt, efficient and personalized service;
- serving customers with care and attention; and
- going out of one's way to ensure that customer's needs are met or exceeded.

Dealing with Crises

To respond to crisis situations and work towards resolving related problems by:

- identifying potential crisis situations early-on;
- acting quickly to deal with a crisis;
- solving potential problems and negative outcomes in a proactive manner, where possible;
- alerting others who may need to respond quickly to the crisis; and
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To communicate ideas and information in writing in a way that ensures that the messages are understood by others through:

- preparing written responses to structured formats such as standard forms, memos or letters;
- presenting written information in a clear and concise way;
- adapting the content and style of written communication for the audience; and
- writing in a compelling manner which holds the reader's attention.

Communicating in One's Second or Third Official Language

To communicate in English, Spanish and French at an appropriate level, as the need arises, by:

- reading documents such as forms, memos, letters and reports;
- producing and/or translating written documents such as memos, letters and reports; and
- acting as interpreter.

Interpersonal Competencies

Respecting Others

To develop and maintain smooth, cooperative working relationships by:

- showing consideration, concern and respect for others;
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- investigating various sources of information;
- taking action beyond explicit requests; and
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Appendix 4: Learning Action Plan

1. Training Activities

1.1 Computer Literacy (All Phases):

- Introduction to present software and to use it most effectively
- Introduction to the Internet
- Lotus Notes® and/or the Department's Client Tracking System
- How to use e-mail

1.2 Language Training (All Phases)

- Report writing skills in English
- Spoken and written French

1.3 Government Structure and/or International Trade (Phase 1)

- Canadian context:
 - Government of Canada, DFAIT, Team Canada
 - Power groups in business and political communities
 - Cultural elements
- Mexican context:
 - Governments at the federal, state and municipal levels
 - Power groups in business and political communities
 - Cultural elements
- Overview of Canadian and Mexican bilateral relations

1.4 Trade Policy and/or Economics (Phase 2)

- Basic understanding of trade policy, economics and finance as relates to trade
- Basic understanding of the NAFTA and other trade agreements
- Expertise in trade policies relevant to specialty sector of staff (i.e., officer in telecommunications: the NAFTA and WTO agreements and/or negotiations)
- Micro- and macro-business perspective
- Legislation, tariffs
- Financing of projects

1.5 Sectoral Expertise (Phase 3)

- Powerful sector by province
- Economic structure of regions
- Specific technical advantages of Canadian goods

2. Competency Development Activities

- Canadian sectoral capabilities

2.1 Working as a Team (All Phases)

- Clarification of new roles
- Cultural differences and how to use them to advantage
- Leadership
- Setting up mechanisms and/or strategies to support team members and team work

2.2 Customer service (Phase 2)

- How to market Canadian services and products to Mexicans
- How to create and maintain effective relationships with clients

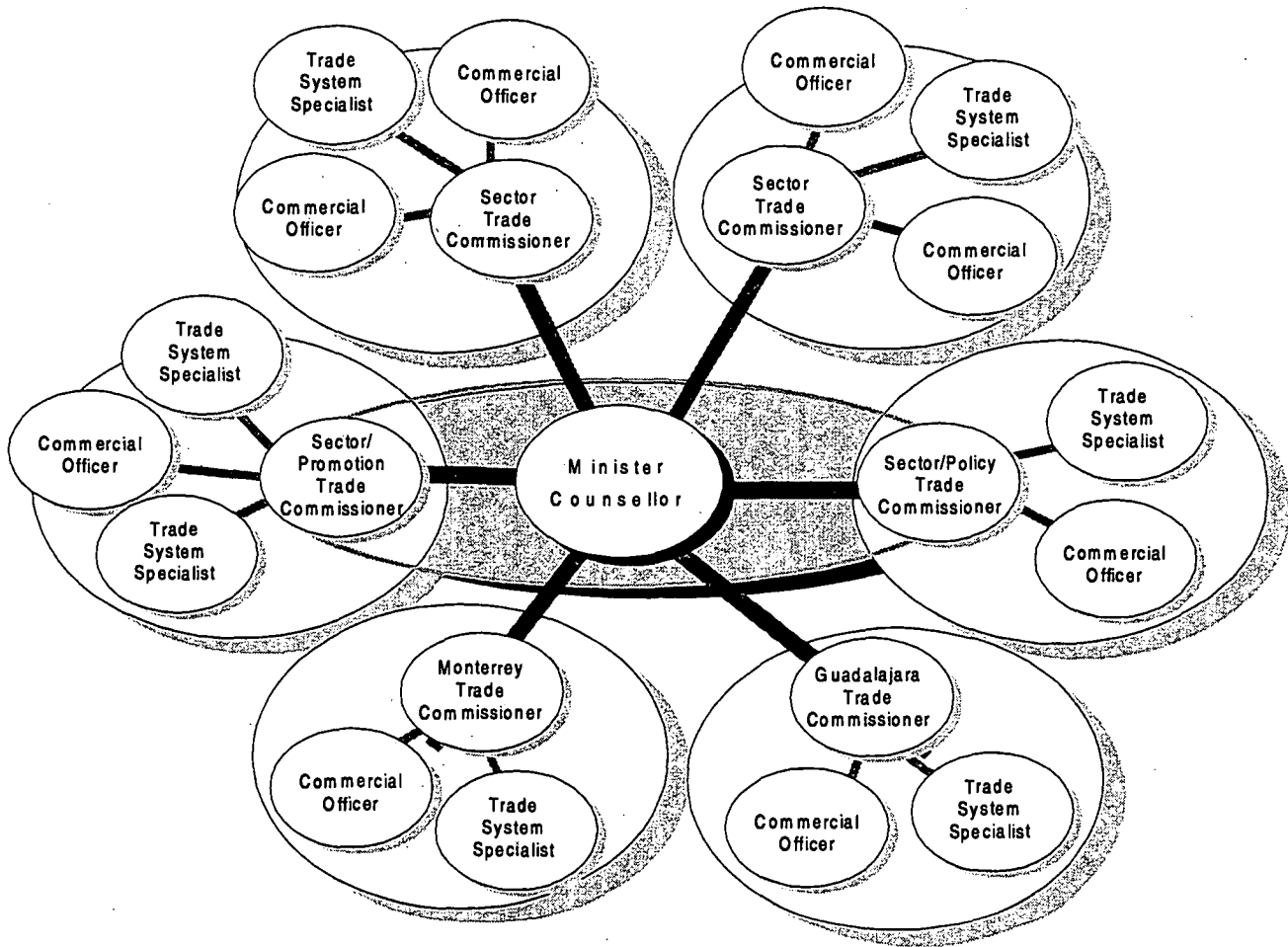
2.3 Personal Management Skills (Phase 2)

- Time management
- Setting priorities

2.4 Communications (Phase 3)

- How to make effective presentations and speeches
- How to negotiate

Appendix 5: Structure: Trade and Economic Program in Mexico



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