

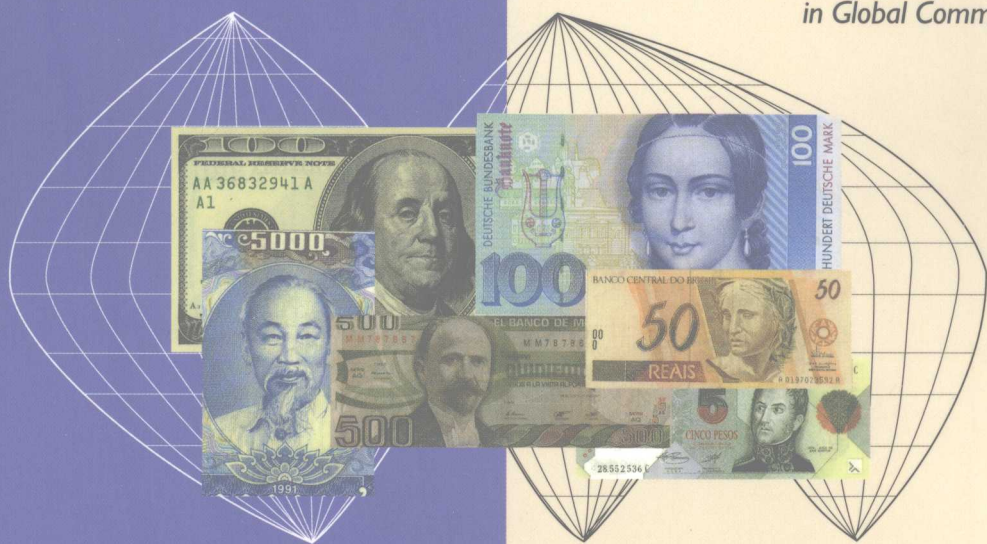
简明商务英语系列教程 ③

A SHORT COURSE IN

INTERNATIONAL BUSINESS PLANS

国际商业计划书

*Charting a Strategy for Success
in Global Commerce*



ROBERT L. BROWN, MBA, JD, Ph.D.
and
ALAN S. GUTTERMAN, MBA, JD, Ph.D.

导读 江 春

THE SHORT COURSE IN INTERNATIONAL TRADE SERIES



上海外语教育出版社

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Editor:

Dr. Jeffrey Edmund Curry

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出版前言

截至2008年,教育部已批准对外经济贸易大学、广东外语外贸大学和上海对外贸易学院三所高校设立商务英语本科专业。目前,全国已有近700所院校开设了商务英语专业方向或课程,商务英语教学内容由语言能力、跨文化交际、商科知识、人文素养四个课程群组成,如何建设和完善商务英语教材已成为办好商务英语专业的关键因素之一。

上海外语教育出版社经过精心策划,适时推出了商务英语知识群的教材——“简明商务英语系列教程”。这套原版商务英语专业知识阅读教材从美国世界贸易图书出版社最新引进,共12本,涉及商科知识的各个领域,包括国际经济学、国际贸易、管理学、营销学、国际商法、商务谈判、商业伦理、商业文化、商业合同、商业支付等。本系列教材的特点是:知识体系完整,内容简明扼要,语言文字流畅,理论联系实际。为了帮助读者更好地理解商务英语学习所必备的商务专业知识,本套教材组织了阵容强大的专家委员会,还特邀对外经济贸易大学商务英语的专家教授为本系列教材撰写导读,相信一定会对学习者大有裨益。

本系列教材可以作为大专院校商务英语、国际贸易、工商管理等专业学生的相关课程的教材,同时也可作为企业各类管理人员的培训教材或辅导资料,以及广大商务英语学习者的自学教程或阅读丛书。

“简明商务英语系列教程”专家委员会

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1 国际商业计划书

1) 什么是国际商业计划书?

商业计划书是对你准备开展的一项企业活动或生意的描述,它也是你打算如何来运作和发展一个企业的规划。而国际商业计划书,顾名思义,就是企业如何将业务拓展到国际市场的精心策划。一个好的商业计划就如同作战前的周密战略部署,也如同企业未来详尽的蓝图。因此撰写商业计划的过程也是对企业的产品创意进行科学而务实的市场和可行性调研的过程;是对所从事的行业、市场、竞争对手充分了解的过程;是了解本国和国际的融资渠道和法律法规的过程;更是做出一系列企业活动的准备和决策的过程。不论是对新创企业还是现存企业,不论是对国内企业还是国际企业,商业计划书的具体决策内容是相似的,它包括公司的名称、选址、法律实体、组织机构、产品组合、营销组合、营业模式和竞争战略等等。但需要指出的是,在国际化和跨国公司时代,企业的竞争是在国际范围内跨越国界的竞争,由于其经营的环境更加复杂,影响企业成功的因素更加多样,因此学习撰写国际商业计划书是非常必要的,尽管其基本撰写步骤和实施方法与商业计划书是相通的。

制定商业计划书有下列具体用途:

- ◆ 有助于形成并实现自己的或公司的远景;
- ◆ 有助于收集有关的信息;
- ◆ 促进形成一个良好的企业决策框架;
- ◆ 让家人、朋友、银行及其他投资者相信你的这项生意是值得投资的;
- ◆ 为未来的商务洽谈、融资、合作和企业监控打下基础。

2) 如何撰写国际商业计划书?

撰写国际商业计划书的关键是产品的创新性和竞争力,对市场的了解度,切实可行的行动计划,出色的管理队伍等。

一个商业计划书一般包括以下几项内容：

◆ 计划摘要

计划摘要列在商业计划书的最前面，它是浓缩了的商业计划书的精华。计划摘要涵盖了计划的要点，以求一目了然，以便读者能在最短的时间内评审计划并做出判断。计划摘要一般包括以下内容：公司介绍；主要产品和业务范围；市场概貌；营销策略；销售计划；生产管理计划；管理者及其组织；财务计划；资金需求状况等。

◆ 产品(服务)介绍

这部分主要说明企业的产品、技术或服务能否或在多大程度上可以解决现实生活中的问题；或者，企业的产品(服务)能否帮助顾客节约开支、增加收入。产品介绍应包括以下内容：产品的概念、性能及特性；主要产品介绍；产品的市场竞争力；产品的研究和开发过程；发展新产品的计划和成本分析；产品的市场前景预测；产品的品牌和专利等。

◆ 人员及组织结构

高素质的管理人员和良好的组织结构是管理好企业的重要保证。因此，风险投资家会特别注重对管理队伍的评估。

◆ 市场预测

市场预测首先是对需求进行预测；其次，是对市场竞争格局进行分析。它包括市场现状综述；竞争厂商概览；目标顾客和目标市场；企业产品的市场地位；市场区分和特征等等。

◆ 营销策略

营销是企业经营中最富挑战性的环节，在商业计划书中，营销策略应包括以下内容：市场机构和营销渠道的选择；营销队伍和管理；促销计划和广告策略；价格决策等。

◆ 制造计划

商业计划书中的生产制造计划应包括以下内容：产品制造和技术设备现状；新产品投产计划；技术提升和设备更新的要求；质量控制和质量改进计划等。

◆ 财务规划

财务规划包括现金流量表、资产负债表以及损益表的制备。流动资金是企业的生命线，因此对流动资金需要有预先周详的计划和进行过程中的严格监控；损益表反映的是企业的赢利状况，它是企业在运作一段时间后的经营结果；资产负债表则反映在某一时段的企业状况，投资者可以通过资产负债表中的数据而得到的比率指标，来衡量企业的经营状况以及可能的投资回报率。

2 本书的特色

1) 作者简介

罗伯特·布朗是 Greenebaum Doll & McDonald 咨询有限公司的股东成员。他在英国剑桥大学获得博士学位,在东京城一大学获得硕士学位。在美国路易维尔大学法学院学习期间,获得了法学博士、工商管理硕士学位。布朗先生在纽约州、华盛顿特区、加利福尼亚州和肯塔基州获得律师资格,在英格兰、威尔士和中国香港也获得律师资格。在过去的 25 年里,他以投资银行和律师的身份与各类新创公司密切合作,为这些创业公司进行公司内部和外部咨询。他的咨询经历十分丰富,先后到伦敦、纽约、东京、旧金山、和圣地亚哥等地工作。布朗博士在旧金山法学院、加州大学伯克立分校教授经济学和法学课程,在贝拉迈大学商学院教授商业计划书、管理金融学和经济学课程。布朗博士在上述领域撰写或编辑了以下书籍:《权益融资》(2001 年),《创业融资》,(现在已经是第 5 版),《网络经商》,《管理你的电子商务 新加坡》,《东亚的商业法》,《东亚的知识产权法》和《亚洲的经济与法律发展》。他的联络方式是: rlb@gdm.com

爱伦·加特曼是旧金山湾地区的作家、律师和咨询师。他在代理创业家、企业家和投资家从事广泛的国内和国际事务方面有 20 多年的丰富经验。他编写过包括跨境交易、战略联合和技术转让等方面的书籍,同时他还在研究生层次开设企业购并、经济法律发展和亚洲市场方面的课程。他目前的研究领域和出版兴趣包括:美国和欧洲成长型公司的开发与管理。他同时也是本系列教程中《跨国合资企业》一书的作者。

2) 本书特色

《国际商业计划书——为国际商务的成功策略导航》一书简单、明了地把撰写国际商业计划书的复杂过程掰开揉碎并传授给我们,使任何一个有志创业的年轻人、寻求重新择业的下岗者、发现了独特市场机会的生意人、具有创新理念和独特创意的管理人,在读完本书之后,都可以摩拳擦掌、信心百倍地撰写自己的国际商业计划书。如果说上个世纪 80 年代的中国,众多的创业家和企业家,是出于贫穷和无奈,靠直觉和天赋打下一片商业天地,那么今天,有知识、有报负、有眼光的企业家则必须走上系统自觉有准备的国际化之路。撰写一份有说服力的国际商业计划书正是企业进行各项商业投资和拓展活动的必要保证。本书浅显易懂,可操作性强,是撰写商业计划书快速入门的好教材。

3) 使用对象与方法

本书适用于各类商务英语大学本科、专科学生；合资、独资、国有企业公司的企业活动策划人员；各类商务写作和企业策划培训人员；也适合作为工商管理硕士创业学课程的辅助教材。教师可以根据学生的背景、需求和层次，按照书中商业计划书写作的步骤和方法，让学生以小组为单位完成一份国际商务活动的策划写作任务。如果是创业计划书的写作，还可以此参加创业大赛活动。

3 本书主要内容

第一章 为什么要撰写国际商业计划书？

本章讲述了撰写国际商业计划书的原因。企业到国外市场寻求新客户、原材料、合作伙伴、资金或劳动力，既有众多机遇，也有诸多陷阱。因此，有意于走出国界的公司有必要撰写国际商业计划书。撰写国际商业计划书所花的时间和精力与未来的收益成正比，这个过程有助于预见未来的艰难险境，有助于调整开拓市场的战略战术，并帮助您在国际市场中攀上成功的顶峰。

第二章 国际商业计划书的基本要素和影响因素

本章讲述了商业计划书的要素和影响因素。每一份商业计划书都包含一系列基本要素，而实际内容则取决于所计划的生意特点、开展方式、评审计划书的对象等因素。通常比较可行的做法是先作好一份单一的计划书，然后根据特定目标而作相应的修改。

第三章 撰写国际商业计划书：基本事宜

本章讲述了撰写国际商业计划书之前、撰写时以及最终评审时应该考虑的一些基本事宜。这些基本事宜包含开拓国际市场所固有的风险以及计划书的范围和基本结构。每一份计划书的“挑剔”的读者都会着重阅读这一部分。

第四章 撰写国际商业计划书：国际拓展

本章讲述了拓展国际业务中撰写商业计划书的各项因素。起草国际商业计划书之前，有必要对影响国际拓展的各项因素进行分析。这些因素事关公司国际商业活动的成败。本章分析了以下四个因素：环境因素、外国市场准入因素、国际融资因素和法律法规因素。

第五章 组建工作团队

成功撰写国际商业计划书离不开众多人士的经验和才干。因此，本章将简要阐述撰写国际商业计划书的工作团队的所有相关人员，主要包括：计划书撰写者、融资专家、资深编辑和分析家。

第六章 计划书第一部分：简介

简介或纲要是计划书的第一个部分，包括三大内容：封面、目录和纲要。许多计划书也从使命或者远景陈述开始。简介的具体内容取决于计划书的目标读者。

第七章 计划书第二部分：公司背景及描述

本章将对公司进行一个全面的描述，包括以下几个方面：公司的成长历史、公司目前和未来的商业活动、公司生产或提供的产品和服务，以及公司所处的行业和市场。此外，本章还将提及主要的客户群体、竞争对手、联盟伙伴和公司管理者等。

第八章 计划书第三部分：产品和服务

计划书的此部分应详细描述并分析公司要提供何种产品和服务，以抓住计划书前面部分中确认的公司所面临的竞争机遇。而国际商业计划书还应阐述公司如何修改国内产品以适应新的国外市场。本章内容还包括公司开发新产品的计划和知识产权等事宜。

第九章 计划书第四部分：制造或服务

计划书的第四部分应详细介绍公司的制造和生产活动：生产设施和设备如何建造，质量控制程序如何设计和执行，产品如何分销，顾客协助计划如何创建，零部件、原材料及其他生产要素如何采购。如果是一家服务公司，其国际商业计划书的第四部分也应包括以上内容，但其焦点是如何提供服务而非如何生产产品。

第十章 计划书第五部分：营销

本章讲述如何识别适合产品销售的市场（从人口特征、收入和教育水平、市场的技术性能和物流条件等方面进行分析），而后决定在这些市场里采用怎样的产品策略（包括定价、促销和产品分销策略）。本章提出计划书在对待营销相关问题时应因各国和各市场的不同而作不同的调整。

第十一章 计划书第六部分：管理与组织机构

任何商业计划书都应详尽地描述公司的管理及组织结构，这一部分对于走向国外的公司尤为重要，因为投资者绝不会把金钱投入一家缺乏管理经验的经理团队的公司。因此，本部分应提供每位管理者在某一行业或职位中确实可信的职业记录、公司如何招聘高层经理及支付薪酬的信息、以及公司的组织结构信息等。

第十二章 计划书第七部分：人力资源

公司撰写国际商业计划书时，不仅要解决一般的人力资源管理问题，如员工招聘、培训、薪酬、升职和终止雇佣关系等，更要考虑到各个国家之间文化

和法律的差异。文化和法律的差异常常是矛盾和问题出现的根源。因此，本部分着重讲述制定全球性人力资源策略时应注意的相关问题。

第十三章 计划书第八部分：专门议题

本章简要阐述以下几个在不同环境中需要区别对待的专门议题：融资、设施和设备、商业运营、信息管理、风险管理和监管。

第十四章 计划书第九部分：财务信息

任何公司的一项重要任务是让其所有者和股东的投资增值，因此商业计划书要提供大量的实质性财务信息，包括公司的历史财务决算、预计财务决算和运营预算。

第十五章 商业计划书起草清单

商业计划书起草清单包含了一份完整的国际商业计划书应解决和提供的绝大部分问题和信息。计划书的一些条目可能会重叠，而计划书整个结构的重点则因公司所处行业或计划目的的不同而异。起草清单能有力地指导整个计划书的撰写，有助于保证计划书覆盖所有重要内容。

第十六章 商业计划书样本 #1：软件公司

本样本是关于一家有多年历史的软件公司欲求得外国公司开发的新产品在国外的销售和产品修改权以拓展国内市场而作。此策略尤其适合产品需求在国内减少的公司，也可用于因市场变化需要引进国外的创新产品的情况。这家软件公司的优势是在当地市场的经验和现有的顾客关系。

第十七章 商业计划书样本 #2：技术制造商

该计划书的主角是一家生产数字加密、解密和多路传输产品的制造商。公司成立不久，其自主技术的创新能力使其迅速地向全球拓展。公司计划在美国成立全资子公司，在欧洲和亚太地区通过建立销售网络开展商业活动，公司外包其在亚太区的顾客服务并寻求低成本制造。由于潜在客户多为政府背景企业，本计划书加入了政府关系内容。

第十八章 商业计划书样本 #3：商业服务零售商

此计划书的主角是一家向国外市场拓展的美国宠物连锁超市。公司成功的因素在于采用统一的零售店结构。计划书的特点在于加入了市场研究和分析的内容：分析宠物主人的消费行为和公司能直接从制造商采购宠物食品的能力。本计划书还包括如何在国外市场实施低成本制造策略和如何开展电子商务销售活动的内容等。

第十九章 保密协议样本

公司可以撰写一份简短的保密协议，涵盖保护公司权利的所有事宜，包括给

需保密的信息下定义、规定协议对方承诺保密并将其归还原公司的义务等内容。公司还可根据需要撰写一份详细的保密协议,以更好地保护公司的保密权利。

第二十章 财务报表样本

本章的几份文件是财务决算表样本。决算表的结构取决于各地标准和编写的软件。所有位于计划书正文的财务决算表应使用统一的报告格式以方便阅读和理解,详细财务数据可放至附录。

第二十一章 外封皮和内封皮安全声明样本

公司可根据商业计划书的使用目的,把一个或多个声明或免责声明放至内封皮或正文的明显处。本章的声明样本是一份遵守美国证券法的声明。无论计划书的具体使用目的如何,保密声明都应写入计划书,并且计划书的接受方应签字同意。

第二十二章 词汇表

第二十三章 资料来源

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- 4) Stutely, Richard. *The Definitive Business Plan: The Fast Track to Intelligent Business Planning for Executives and Entrepreneurs*. Pearson Education Limited. 2007.
- 5) Townsley, Maria. 江春译 *Survivor's Guide to Small Business*. 《中小企业生存指南》,中国人民大学出版社,2006.

INTRODUCTION

A Short Course in International Business Plans is a practical guide to the research, development and writing of an international business plan. Emphasis is placed upon the purposes, issues, content and format of the plan itself.

Two assumptions are made. The first is that you have already made the decision to “go global,” whether as a start-up enterprise or as an expansion of an existing domestic business. The second is that you have already chosen, at least preliminarily, the international market or markets of best opportunity. If you have not yet decided upon your target market(s), we recommend that you consider reading *A Short Course in International Marketing*.

BUSINESS PLANS VS. INTERNATIONAL BUSINESS PLANS

Domestic and international business plans share a similar structure and cover many of the same issues, such as descriptions of the company, its key players and plans for expansion. International business plans, however, are unique in the way these issues are addressed. In every instance, the development of a business plan for cross-border materials sourcing, manufacturing, marketing and/or sales requires unique research, expertise and emphasis.

That said, do not abandon any prior efforts at writing a domestic business plan. In many cases, your domestic plan can serve as a starting point. This book will alert you to the key differences and let you know where the emphasis needs to be placed. We'll expand your horizons and your business plan in the process.

CULTURE SHOCK

The authors have operated for many years in the international arena and have tried to understand with humility and interest the unique cultures of the world. We recognize that not every culture works the same way. We also acknowledge that we were brought up in the United States and that our perspective is that of North Americans. We have made every attempt, however, to make this book relevant to businesspeople from any country wanting to do business in any country. We believe that the fundamental issues of planning are the same regardless of where you are from and where you are going.

SAMPLE BUSINESS PLANS

This book contains a number of sample business plans that cover a spectrum of industries and business situations. While they are detailed to the particular business, they will present an excellent picture of the type of detail expected in a modern international business plan. As such, they are not forms with lots of “fill-in-the-blanks.” Rather, the blanks are already filled in so the reader is provided with a more complete idea of what a plan actually looks like once it is finished.

WRITE YOUR PLAN

Although it may be tempting to avoid the labor and time needed to develop and write a plan, we know from our own experience that it is better to plan than to enter a new market without making the effort. Lack of planning typically leads to failure. Follow the guidelines and write your plan; we want you to succeed!

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Why Write an International Business Plan?

TACTICS WITHOUT STRATEGY IS THE NOISE BEFORE DEFEAT. — SUN TZU

THIS BOOK IS ABOUT PREPARING AN INTERNATIONAL BUSINESS PLAN — a formal written plan for a company that seeks to gain benefit from foreign markets for new customers, raw materials, manufacturing partners, capital or labor. Countless opportunities await, but there are many pitfalls too. The time you spend in creating a solid business plan will help you anticipate the tough spots, modify your approach and climb to the peak of success in the international marketplace. A wise business leader is one who formulates a strategy that accounts for the considerations of going global.

FAQs of an International Business Plan

- QUESTION: Why write a business plan at all?
- ANSWER: A business should never be started or operated without a clear plan of what the owners intend to do and how they intend to accomplish their goals. Not having a business plan is equivalent to driving through a new area without a map.
- QUESTION: If I already have a domestic business plan, why make an international one?
- ANSWER: The need for a business plan is even more acute when a company is looking for opportunities in international markets. Many of the basic building blocks for an international business plan are similar to those for a domestic one, but in the global environment, a company will encounter new and different issues with additional risks.
- QUESTION: What will an international business plan accomplish for me?
- ANSWER: For any business, a plan will settle or fix your vision into a working commercial model both for internal management purposes and for use in persuading external resources — e.g., investors, bankers or potential business partners — of the realized and potential value of the business. If properly formulated, it will define your company's goals, identify meritorious features and potential pitfalls and establish operational policies, structure and procedures. For an international business, a plan will also cover features of cross-border and cross-cultural trading that your company will need to address in order to benefit from the advantages of, and survive in, the global arena.

Global Facets of a Company

Is your company “global enough” to warrant an international business plan? Global companies come in many sizes. Perhaps you think that a global company has to be a giant multinational corporation with franchises in every major metropolitan area around the world. Consider whether any of the following situations might fit your company:

- A processed food business in Hong Kong specializing in favorite local dishes decides to export its products to California to tap into the Asian population there and the general popularity of Chinese culinary delicacies.
- A manufacturer of popular dolls in Spain contracts with local distributors in other Spanish-speaking countries for promotion and sale of the dolls in those countries. The manufacturer is able to capitalize on the favorable demographics and opportunities for using its own promotional assets (e.g., TV commercials) in new markets of Spanish-speaking consumers.
- A producer of an animated television series in Japan localizes the content for distribution in English-language markets. Or vice versa!
- A Nigerian watchmaker uses parts imported from Switzerland.
- Each of these companies is linked to the global economy and can benefit from an international business plan. The development of an international business plan — whether simple or complex — can be important to the realization of international success for a giant conglomerate as well as for a small company.

Achieving International Advantages

Having made the decision to “go global,” your company must next consider how it is going to proceed to achieve the many advantages offered in the international trade arena. A company might seek to reduce its costs and risks, expand into new markets, procure reliable and less expensive sources of supplies and materials, improve production and technical abilities or enlarge its available labor pool.

Building an international company is similar to building a house. You begin with a vision. Your vision is translated into a plan. Your plan serves as the basic guideline for turning the vision into a real home with a strong foundation, secure walls and a protective, leak-proof roof. Likewise, an international business plan is the blueprint of a global company. It is an essential tool by which a company can identify desirable opportunities of cross-border operations and set short-term and long-term company goals for achieving perceived international trade advantages.

REDUCE OPERATIONAL COSTS

Primary reasons for entering a foreign market are to take advantage of *perceived* market opportunities and to reduce the costs of operation and production. Without a plan, however, opportunities can turn out to be more costly than the anticipated benefits.

What is so attractive about moving into another country? Perhaps you think that you will be able to reduce labor costs by tapping into the large pool of low-wage workers available there. Maybe the foreign country allows foreign investment in land and building facilities. If so, these resources might be available at less expense than in your own country, which would reduce your company's capital costs. Some countries offer incentives to attract business investment, such as exemptions from local taxes and tariffs or reduced licensing and documentary fees.

But what about the extra costs of doing business in another place — a faraway place? Will you move your whole operation or run two facilities? How do you coordinate and divide responsibilities? What about the expense of training, travel, moving, import and export, business registration, operational licenses and protection of the expanded use of trademarks, patents and other intellectual property? Do you have a plan to find and implement the advantages in such a way as to overcome the additional burdens?

REDUCE RISK BY DIVERSIFYING MARKETS

A company's international business plan may seek to establish global operations that are aimed at diversifying the company's market opportunities in order to reduce the risk of dwindling demand. By entering a new foreign market, a company can increase sales, extend its customer base and gain protection against variations in buying cycles that might occur in the company's home market. For example, a company that sells clothes used in warm weather, such as swimsuits, can follow the summer around the world to create a steady, year-long demand.

Plan in advance to avoid potential disaster when demand falls below sustainable levels — whether because of market saturation, outmoded products or otherwise. Foreign markets can provide good opportunities for selling older, more mature products that have become obsolete in technologically advanced markets. A network of global facilities can allow a company to divert products and supplies quickly to regions where demand is booming.

REDUCE RISK BY DIVERSIFYING SUPPLIERS

Companies that use raw materials will benefit from an international business plan that addresses the risk associated with relying on a single supply source. Materials that are scarce or even non-existent in a company's home country may be abundant and inexpensive in a foreign market. Assume that a company sells quarried stone. It can obtain varieties from quarries in various parts of the world to ensure a reliable supply regardless of disruptions at any single source because of uncontrollable events ranging from inclement weather to labor disputes to political or civil upheaval.

If you plan in advance, your business need not be limited when materials become unavailable or prohibitively expensive in one market. Instead, you will know how and where to pursue reliable sources in other countries. Risk reduction strategies might include shipping materials from a foreign country for manufacture elsewhere or finding a manufacturing facility within the foreign country where the materials are easily available. To assure access to products that are unavailable in Japan unless imported, Japanese automobile manufacturers have