

Request for Proposals
For Matchmaking Services
Atlantic Canadian Grow Export Virtual Trade Mission
to Atlanta, Georgia
March 2021

Deadline: January 22nd, 4:30pm AST

Project Background

The overarching goal of the Grow Export 2020 program is to promote export to Atlantic Canadian companies that have not explored export or who have not engaged strategically in the global marketplace, and to provide tools to support future export related endeavors. This project is focused on new exporters and the export curious. These are companies that do not have exporting as a key strategic goal or a plan to engage in export. Often these companies have fewer than 5 staff (although not always), some would be considered “startups” and may have had an “accidental export” in the past but are not exporting regularly. As this project is pan-Atlantic in nature, we will be considering export to be defined as sales outside of Canada. This multi sector project has 30 participants, seven to eight companies from each of the four Atlantic provinces. The Grow Export project consists of multiple training and coaching opportunities to build export skills and culminates in an optional educational trade mission to Atlanta, Georgia. It is anticipated that 20 companies will participate in the trade mission.

This virtual trade mission will enable participating companies to receive additional export training which will encompass virtual experiences and validate the work they have completed over the course of the program. This additional export training may include but is not limited to pre-mission initiatives such as: pitch training; an overview of the Atlanta market and the nuances of exporting to this market. In addition, companies will also engage in virtual business meetings with key experts and potential buyers. At the end of this program, this new exporter cohort will be better prepared and connected in the Atlanta market; and will have a real idea of how to take their product and/or service to an international market place.

The organizing team for Grow Export is comprised of officials from Innovation PEI (IPEI), Nova Scotia Business Inc (NSBI), the Government of Newfoundland and Labrador, Opportunities New Brunswick (ONB) as well as Atlantic Canada Opportunities Agency (ACOA) trade officials from each province.

Scope of Services Required

The Association is seeking the services of a consultant to provide co-ordination, matchmaking services and logistics for participating companies. A combination of pre-mission educational opportunities, virtual meetings with the Canadian Consulate and export service providers, as well as soft virtual B2B meetings and follow-up activities will need to be arranged. A seasoned business matchmaker with experience in the Atlanta market and with virtual trade is being sought.

Under the Association's management, the consultant will be responsible for:

- Pre-mission Export Training sessions - Coordination of a series of webinars on how to strategically plan, execute and follow-up on a virtual international sales visit, Canada/U.S. customs requirements for exporting goods, Intellectual property protection, USFDA requirements for food companies and Cross border labour and immigration laws;
- Developing company profiles to determine mission objectives; products/services and sector/market interest; as well to prepare companies to do business in the Atlanta Market;
- Identify potential buyers for companies based on criteria established through discussions and listed on their company profiles;
- Coordinate soft virtual B2B meetings that align with the company objectives. It is anticipated that a minimum of four (4) meetings will be set up for each participating company;
- Scheduling and coordinating all presentations, soft B2B meetings and group training, working with the Association and Organizing Team and engaging with known contacts. These are to meet the objectives of the mission as well as participating companies' requirements. Meetings are to be normally scheduled within the week of March 8th – 12th, 2021, if required meetings can take place outside of this timeframe. Creation of a master document tracking all meetings, including times, platform, and all pertinent contact information that is necessary. The master document will be sent to the Association and Organizing Team and company specific itineraries will be provided to the companies;
- The consultant will provide participating companies and government partners with a weekly update on activities, including research conducted, appointments scheduled to date, etc. Contact is to be made by telephone, virtual meeting and/or via electronic mail;
- The consultant will work closely with the Association and Organizing Team as well as the Trade Commissioner Service in the Atlanta Consulate Office to leverage contacts in addition to their own in-market contacts during the planning of the program;
- The consultant will provide participating companies with individual agendas, including a company and LinkedIn profile of each organization they may be meeting with by March 1st, 2021. The profile is to include a company contact and title, web site, company address and company brochure or written description of the Atlanta firm and their products or services. This profile will outline what is to be discussed, what the key factors were in the US organization agreeing to meet and any additional information gathered during the meeting booking;

- The consultant will provide mission follow-up support to companies within one-month following the mission. Follow-up support may include but is not limited to: Updating and refining any materials developed in preparation for the mission and B2B meetings; Follow-up actions with potential buyers and partners related to the meetings arranged by the matchmaker or other direct mission-related initiatives;
- The Consultant will source and coordinate an appropriate virtual platform to host virtual meetings and virtual training and will ensure all participants receive training on how to use the platform;
- The consultant will conduct a needs assessment with all participating companies to assess their readiness for virtual meetings, including what tools and skills they need to make their meetings successful;
- The Consultant will submit a final report after the follow-up support phase of this project which will include: Overview of pre-mission training; Number of client meetings held per company including full contact details of person(s) who attended the meetings; Any anecdotal information of importance; including a summary of key success stories; Follow-up actions required by each company; and Recommendations for future similar projects.

Schedule

The trade mission will run for five business days from March 8th – 12th, 2021. Due to the virtual nature of the mission, meetings can be scheduled outside of this timeframe if necessary.

Proposal Submission

Submission procedures are to be followed by all proponents. Proponents are cautioned to carefully read and follow the procedures required by this Request for Proposal, as any deviation from these requirements may be cause for rejection of the submission. The proposal must be signed (electronic signatures are acceptable) by the person(s) authorized to sign on behalf of the proponent and to bind the proponent to statements made in response to this Request for Proposals.

The proposal should include the following:

- The main body of the Proposal will be a maximum of 15 pages. Appendices are excluded from this page count but should be relevant supporting documents: Curriculum Vitae of staff directly working on the project, company profile, and references are examples;
- Introduction to the Contractor including its primary focus of business, services offered, and client base;
- Clear demonstration of background and previous experience working in-market should be demonstrated. Preference will be given to more recent (five years) relevant work in-market & market partnerships;
- Clear demonstration of experience with virtual trade missions;

- Identification of the contractor’s capabilities across multiple sectors as there is significant diversity in the group of participating companies;
- Clear identification of the lead contractor including their role and scope of work. Up to date Curriculum Vitae as an Appendix is required;
- Clear identification of any sub-contractors including their role and scope of work. Up to date Curriculum Vitae as Appendices are required for all sub-contractors;
- Outline of how services for the mission will be delivered, including the management of communications with project team, delegate companies, and target market contacts;
- Methodology for identifying key prospects for delegate companies;
- Proposed technology platform and experience with the technology;
- Identification of potential challenges anticipated for the trade mission and potential strategies to overcome these challenges including competitive conflicts between delegate companies;
- As an Appendix, names of former clients for whom similar or relevant work has been performed should be presented as references, as well as a description of the work completed including the results achieved;
- Detailed project work plan with associated timelines and deliverables;
- Detailed project budget. Please include in your quotation any administration expenses – faxes, mailings, telephone, etc.
- The consultant must disclose all major activities that they have contracted to occur within the one-month period prior to the mission, and one month subsequent.

Proposals must be received no later than 4:30pm AST, January 22nd, 2021.

Proposals must be submitted electronically to:

Erinn Smith
 Executive Director
 NS Association of CBDCs
 erinn.smith@cbdc.ca
 Ph: (902) 384-3346

Evaluation Process

The successful contractor will be selected based upon the following:

- Demonstrated understanding of the overall scope and objectives of the proposal;
- Matchmaking Experience
 - The extent of knowledge and matchmaking experience in relation to the project scope;
 - Proven ability to successfully coordinate multi-sector trade missions;
 - Experience with virtual trade missions;

- Target Market
 - Demonstrated advanced understanding of various sectors in the target market, including both products and services within the Atlanta business community;
 - Proven network of contacts in Atlanta;
- Team and Technology
 - The proposal must clearly articulate team members' experience;
 - Confirmation of adequate time and resources to devote to the mission must be stated;
 - Identification of any in-market partners that will be used to execute the project;
 - Identification of matchmaking lead
 - Identification of technology and proposed meeting platform
- Atlantic Canadian Business Acumen
 - Clear demonstration of an in-depth understanding of businesses in Atlantic Canada, their challenges, strengths, expertise and export successes;
- Organization of Proposal
 - Proposal should be concise, comprehensive and presented with clarity to demonstrate how the Scope of Services will be satisfied;
 - Proposed approach to the project, including consideration for strengths, weaknesses, opportunities and threats to the success of the mission;
 - Defined work plan and schedule should be included;
- Cost* (in Canadian dollars)

*Determination of best value may not result in the lowest cost being accepted. The selection committee will consist of representatives from the Association and the project team.

Budget

The budget for this project is up to a maximum of \$100,000 CAD plus HST.

For budgeting purposes, the contractor should develop and present its fee schedule with a base amount and a sliding scale based on number of delegates registered to attend (maximum number of delegates is 20). Final contract price will be determined by the number of delegates participating.

Please include in the quotation any administration expenses – printing, faxes, mailings, telephone, etc. as no administration expenses will be reimbursed separately from the contract price.

*The best value bid will be selected, not necessarily, the lowest cost bid.

Payment schedule is as follows:

- 25% upon signing of contract;
- 50% upon submission of final matchmaking schedule;
- 25% holdback paid upon satisfactory completion of the project.

Any questions related to the Request for Proposals may be directed to:

Erinn Smith

Erinn.smith@cbdc.ca

Ph: (902) 384-3346