

Request for Proposals: Matchmaking Services

Atlantic Canadian Launch Export Trade Mission

Atlanta, Georgia June 2023

Deadline: Wednesday, February 15th, 2023

Project Background

The Launch Export Atlantic Incubator (formerly Grow Export) is a Pan-Atlantic project that provides Atlantic Canadian companies with practical information and training on growing their business toward export. Launch Export targets companies new to exporting with the goal of engaging entrepreneurs, raising export awareness, and supporting growth through training, coaching, and access to experts. In addition to the goal of increasing export awareness and readiness in participating companies, the project also aims to deepen in-market relationships.

The Launch Export incubator 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, some would be considered start-ups and may have had an “accidental export” in the past but are not exporting regularly. This multi-sector project has up to 32 participants, eight companies from each of the four Atlantic provinces. Launch Export project consists of multiple training and coaching opportunities to build export skills and culminates in an optional educational trade mission to Atlanta, Georgia. The trade mission component of the program is optional and is capped at 20 companies. Proposed mission dates – June 5th – 9th, 2023.

This educational trade mission will enable participating companies to receive additional export training which will encompass 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 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 marketplace. The organizing team for Launch Export includes officials from Innovation PEI (IPEI), Invest Nova Scotia, the Government of Newfoundland and Labrador, Opportunities New Brunswick (ONB) as well as the Atlantic Canada Opportunities Agency (ACOA).

Scope of Services Required

The Association is seeking a consultant to provide co-ordination, matchmaking, and logistics for participating companies. A combination of pre-mission educational opportunities, connections with the Trade Commissioner Service, as well as B2B meetings and follow-up activities will need to be arranged.

We are looking for a seasoned business matchmaker with experience in the Atlanta market. Having a high quality local, in-market connections/team is crucial.

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

- Pre-mission Export Training sessions - Coordination of webinars, potential topics to include market overview, how to strategically plan, execute and follow-up on an international sales visit, pitch training, Canada/U.S. customs requirements for exporting goods and trade mission expectations.
- Updating 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. A rationale for each match is to be provided.
- Coordinate in-market B2B meetings that align with the company objectives. It is anticipated that a minimum of five meetings will be set up for each participating company (maximum of 20 companies will participate). Educational meetings set up for a small group can count toward the 5 meeting minimum.
- Scheduling and coordinating all presentations, 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 June 5th – 9th, 2023. Creation of a master document or software tracking all meetings, including times, location, and all pertinent contact information that is necessary. The master document/software will be available 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 bi-weekly update on activities, including research conducted, appointments scheduled to date, etc. Contact is to be made by via email and occasional virtual meetings as necessary.
- 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 profile of each organization they may be meeting with by May 29th, 2023. 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 be present in-market during the trade mission and will organize bookings for hotels, receptions, and transportation to/from B2B meetings.
- 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 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 June 5th – 9th, 2023.

Proposed schedule for training

- Overview of the Atlanta Market: Before Mission
- Logistics: Before Mission
- Mission Expectations: Before Mission

Proposed In-Market Schedule

- Sun Kick-off, schedules
- Mon In-Market Meetings, Evening catchup
- Tue B2B/Tours, TCS/CC Reception
- Wed B2B/Tours, Evening catchup
- Thu B2B/Tours, Full in-market debrief
- Fri Overflow B2B/tours, travel home

Follow up

Full Debrief/Follow up with Matchmaker: Within one week after returning home (virtual).

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 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. The rationale for prospects/proposed meetings is to be provided to the delegate company.
- Proposed technology and experience with technology for managing delegate company information, scheduling in-market meetings, and communicating with the Organizing Team.
- 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 – technology, 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, Wednesday, February 15th, 2023

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.
- Target Market
 - Demonstrate 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 and/or identification of in-market partners.
- Team
 - The proposal must clearly articulate team members' experience and relevant skills for the target market.
 - Confirm adequate time and resources to devote to the mission must be stated.
 - Identify matchmaking lead.
- In-Market Partners
 - Identify any in-market partners that will be used to execute the project and demonstrate the skill, knowledge, credibility/reputation, and experience to access the companies and specific individuals for build the delegates schedules for B2B meeting in this market.
- Technology
 - The applicant has demonstrated experience with technology to manage for managing delegate company information, scheduling in-market meetings, and communicating with the Organizing Team.
- Atlantic Canadian Business Acumen
 - Clearly demonstrate 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 clearly 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.
 - *Please note that only information contained in the proposal may be used to evaluate the proponent/proposal.*
- References
 - Provided references that are recent and relevant to the RFP scope.
- Cost* (in Canadian dollars)
 - Did the proposal bid amount come within the expected target budget of the project? (A submission amount, over the budgeted amount can disqualify the proposal).
Determination of best value may not result in the lowest cost being accepted.
- Value Add
 - Does the proposal provide any value added services outside of the scope of the RFP?

The selection committee will consist of representatives from the Association and the Organizing Team.

Budget

The budget for this project is up to a maximum of \$90,000 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, 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.

This project is subject to funding approval. The project committee may choose to re-engage the successful consultant for the 2024 mission based on the satisfactory execution of the 2023 mission.

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

Erinn Smith

Erinn.smith@cbdc.ca

Ph: (902) 384-3346