Optimize 360 Executive Export Series™

OES-01

Texas Export Readiness Checklist™

Helping Texas Small Businesses Prepare for International Expansion Opportunities

Executive Overview

International expansion presents significant opportunities for Texas manufacturers, technology companies, industrial suppliers, and innovation-driven SMEs. This guide helps business owners evaluate their readiness for international expansion by reviewing leadership commitment, documentation, financial preparedness, and strategic planning.

Who Should Use This Guide

- Texas manufacturers
- Technology companies
- Industrial suppliers
- Medical device companies
- Engineering firms
- Business owners, CEOs, Presidents and Export Managers

Executive Readiness Checklist

1. Company Profile

☐ Headquartered in Texas

☐ Meets applicable SBA small business size standards

☐ Established operating history

☐ Domestic commercial success

☐ Executive leadership supports international expansion

2. Export Readiness

☐ Products have international market potential

☐ Production capacity available

☐ Competitive advantages identified

☐ International objectives defined

☐ Long-term commitment to export growth

3. Financial Readiness

☐ Expansion budget allocated

☐ Accounting records organized

☐ Payment documentation available

☐ Understands reimbursement process

4. Documentation Readiness

☐ Business records current

☐ Financial records organized

☐ Banking information available

☐ Project documentation maintained

5. Executive Commitment

☐ Leadership participates

☐ Decision-makers available

☐ Timely follow-up planned

☐ International expansion viewed as a strategic initiative

Executive Tip

Companies that prepare thoroughly before entering international markets are generally better positioned to identify qualified opportunities and build sustainable international relationships.

Common Preparation Mistakes

- Beginning without clear objectives.
- Poor documentation.
- Choosing markets without sufficient research.
- Underestimating relationship development.
- Treating international expansion as a one-time event.

Next Step

Continue with OES-02: International Expansion Planning Checklist™