



OPTIMIZE 360

Optimizing Businesses to Their Ultimate Potential

THE TEXAS STEP SUCCESS BLUEPRINT™



An Executive Visual Guide for
Texas Companies Pursuing
International Expansion

TÜRKİYE

Expanding
Opportunities

MALAYSIA

Strategic
Partnerships



VERSION 1.0



2026 EDITION



HOUSTON, TEXAS

EXECUTIVE OVERVIEW



ABOUT THIS GUIDE

The Texas STEP Success Blueprint™ is a practical executive reference developed by Optimize 360 to help Texas companies better understand the key stages of preparing for international trade missions and navigating the administrative processes commonly associated with STEP-supported international business development activities.

Rather than presenting lengthy technical manuals, this guide summarizes important concepts through concise executive visuals designed to help business owners and management teams quickly understand the overall process.

Because every company and every funding cycle may differ, organizations should always verify current eligibility requirements, documentation standards, reimbursement procedures, deadlines, and official program guidance with the appropriate administering agencies before making business decisions or submitting applications.

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INTENDED AUDIENCE

- | | |
|--------------------------|-------------------|
| Texas Manufacturers | Export-Ready SMEs |
| Technology Companies | Business Owners |
| Medical Device Companies | Executive Teams |
| Industrial Firms | |



HOW TO USE THIS GUIDE

This guide is designed to be used as a quick-reference visual companion.

Review each page, apply the insights to your planning process, and ensure you maintain accurate, complete, and well-organized records throughout your international expansion journey.



STEP-01 TEXAS STEP ELIGIBILITY CHECKER™

Are You Eligible to Access the Texas STEP Grant?

ARE YOU ELIGIBLE?

-  **1 TEXAS BUSINESS?** 
-  **2 12+ MONTHS IN TEXAS?** 
-  **3 51% U.S. CONTENT?** 
-  **4 ACTIVE UEI ON SAM.GOV?** 
-  **5 CAN FUND EXPENSES UPFRONT?** 
-  **6 COMMITMENT TO MEET PROGRAM REQUIREMENTS?** 

WHAT IT MEANS



Your business must be registered and operating in the State of Texas.



Your business must have been active for 12 continuous months or more.



Your export product or service must contain at least 51% U.S. origin content.



Your business must have an active, valid UEI registered on SAM.gov.



You must be able to pay milestone expenses out of pocket; grants are reimbursed.



You agree to comply with all program rules, deadlines, documentation, and reporting requirements.



ELIGIBLE TO PROCEED!

You are ready to explore global opportunities with the **Optimize 360 Global Trade Expansion Missions.**



GLOBAL
OPPORTUNITIES



STRATEGIC
PARTNERSHIPS



SUSTAINABLE
GROWTH

STEP-02 STEP REIMBURSEMENT JOURNEY™

FROM PLANNING TO REIMBURSEMENT



YOU PAY FIRST.
Reimbursement comes later.



DOCUMENT EVERYTHING.
Complete, accurate records drive approval.



SUBMIT ON TIME.
Late or incomplete submissions may be denied.



STAY COMPLIANT.
Follow all program rules and reporting requirements.



TRACK A: TÜRKİYE MISSION



Application Closes
SEPTEMBER 18, 2026

Mission Dates: NOVEMBER 7 – 22, 2026

OR



TRACK B: MALAYSIA MISSION



Application Closes
NOVEMBER 20, 2026

Mission Dates: JANUARY 9 – 24, 2027



A CLEAR PROCESS. REAL IMPACT.

Follow the journey. Submit the documents. Get reimbursed.



STEP-03 STEP DOCUMENTATION MATRIX™

• THE RIGHT DOCUMENTS. AT THE RIGHT TIME. •

STAGE	 ENROLLMENT	 PLANNING & AGREEMENT	 PAYMENT	 TRAVEL	 MISSION EXECUTION	 POST-MISSION REPORTING	 REIMBURSEMENT PACKAGE
PURPOSE	Establish eligibility and corporate identity.	Define mission and secure approval.	Activate grant through required payment.	Travel to mission destination.	Engage with partners and document participation.	Summarize outcomes and gather records.	Compile and submit complete package for reimbursement.
KEY DOCUMENTS	• Texas Business Registration • EIN / Tax ID • SAM.gov UEI Confirmation • W-9 Form • Proof of Texas Address	• Project / Mission Plan • STEP Grant Application • Budget & Cost Breakdown • Master Client Service Agreement • Approval Letter	• Invoice from Optimize 360 • Proof of Payment (Cancelled Check / Receipt) • Bank / Card Authorization (If applicable)	• Flight Itinerary & E-Tickets • Boarding Passes • Hotel Invoices • Ground Transport Receipts • Travel Expense Receipts	• Meeting Agendas & Schedules • Meeting Records / Notes • Photos with Partners • Event / Conference Badges • Partner Sign-in Sheets	• Mission Report • Meeting Summary • Marketing / Promotional Materials • Outcomes & Insights	• All Expense Receipts • Proof of Participation • Complete Expense Report • Reimbursement Request Form



**DOCUMENT SMART.
GET REIMBURSED.**



Use the right documents for every stage.



Keep records accurate, complete, and organized.



Proper documentation ensures faster approval.



Better documentation. Stronger compliance. Faster reimbursement.

— STEP-04 — STEP COMPLIANCE TIMELINE™

KEY DATES. CLEAR ACTIONS. SUCCESSFUL REIMBURSEMENT.

BEFORE MISSION

MONTH 1



**PLAN &
PREPARE**

Confirm eligibility,
gather documents,
and define mission
objectives.

MONTH 2



**AGREEMENT &
APPROVAL**

Sign Master Client
Agreement and
secure grant
approval.

MONTH 3



**PAY TRANCES
(AS PER AGREEMENT)**

Pay tranches as
per Master Client
Agreement to
activate grant.

DURING MISSION

MISSION WINDOW



**NOV 7 – 22, 2026
TÜRKİYE MISSION**

OR

**JAN 9 – 24, 2027
MALAYSIA MISSION**

Travel, meet partners,
and execute mission
activities.

AFTER MISSION

MONTH +1



**DOCUMENT &
COLLECT**

Collect all required
proof of participation
and expenses.

MONTH +2



**SUBMIT
PACKAGE**

Submit complete
reimbursement
package to
the state.

MONTH +3
TO +6



**STATE REVIEW &
REIMBURSEMENT**

State reviews,
approves, and
reimburses eligible
expenses.



STAY ON TRACK

Follow the timeline and
meet all requirements
on time.



SUBMIT COMPLETE

Accurate, complete
submissions prevent
delays.



COMPLY ALWAYS

Follow all program rules
and maintain proper
records.



GET REIMBURSED

Compliance today
delivers reimbursement
tomorrow.



PLAN AHEAD. STAY COMPLIANT. GET REIMBURSED.

Your success starts with timing, documentation, and compliance.



TOP 20 REASONS STEP APPLICATIONS FAIL

— • AVOID THESE. PROTECT YOUR REIMBURSEMENT. — •

1



INELIGIBLE
BUSINESS

2



MISSING OR
INVALID UEI

3



LATE
APPLICATION

4



INCOMPLETE OR
INCORRECT
DOCUMENTS

5



INCORRECT
OR MISSING
INVOICES

6



NO PROOF
OF PAYMENT

7



MISSING TRAVEL
RECORDS

8



INSUFFICIENT
MEETING
EVIDENCE

9



NO PHOTOS
OR EVENT
PROOF

10



MISSING
SIGN-IN
SHEETS

11



INCOMPLETE
MISSION
AGENDA

12



INADEQUATE
REPORTING

13



INELIGIBLE
EXPENSES
CLAIMED

14



APPLICATION
SUBMITTED
TOO EARLY
OR TOO LATE

15



MISSING
MASTER CLIENT
AGREEMENT

16



BANK STATEMENTS
OR RECEIPTS
NOT PROVIDED

17



INCONSISTENT
INFORMATION

18



LACK OF
FOLLOW-UP
RESPONSES

19



FAILURE TO MEET
PROGRAM
REQUIREMENTS

20



NON-COMPLIANCE
WITH STATE
GUIDELINES



**DON'T RISK
DISQUALIFICATION.
GET IT RIGHT.**



FOLLOW GUIDELINES
SUBMIT COMPLETE,
ACCURATE
DOCUMENTATION.



STAY COMPLIANT
PROTECT YOUR TIME,
INVESTMENT, AND
REIMBURSEMENT.



PREPARE SMART
SUCCESS IS IN THE
DETAILS.

If selected for audit, Texas STEP requires complete, accurate, and organized records.

Have these categories ready. Keep them current. Stay compliant.



1. CORPORATE RECORDS

- ✓ Business Registration
- ✓ EIN / Tax ID
- ✓ UEI / SAM.gov Confirmation
- ✓ Texas Address Proof
- ✓ W-9 Form
- ✓ Master Client Agreement



Prove who you are and your business eligibility.



2. FINANCIAL RECORDS

- ✓ Invoices & Receipts
- ✓ Proof of Payments (Bank / Card Statements)
- ✓ Expense Breakdown
- ✓ Cancelled Checks
- ✓ Accounting Records
- ✓ Grant Payment Records



Prove how funds were used and payments made.



3. MISSION RECORDS

- ✓ Mission Agenda
- ✓ Partner / Client List
- ✓ Meeting Schedules
- ✓ Meeting Notes
- ✓ Sign-in Sheets
- ✓ Event / Conference Badges



Prove the purpose of your mission activities.



4. TRAVEL RECORDS

- ✓ E-Tickets / Itinerary
- ✓ Boarding Passes
- ✓ Hotel Invoices
- ✓ Ground Transport Receipts
- ✓ Travel Expense Receipts
- ✓ Travel Policy (If any)



Prove travel was necessary and properly documented.



5. PAYMENT RECORDS

- ✓ Tranche Payment Invoices
- ✓ Proof of Payment (to Optimize 360)
- ✓ Bank / Card Authorizations
- ✓ Grant Payment Confirmation



Prove Grant funds were received and applied correctly.



6. COMMUNICATION RECORDS

- ✓ Emails with Partners
- ✓ Meeting Confirmations
- ✓ Follow-up Correspondence
- ✓ Support Requests to Optimize 360
- ✓ Program Notifications



Prove ongoing communication and due diligence.



**AUDIT READY.
REIMBURSEMENT
SECURED.**



ORGANIZE

Keep records current and well-structured.



DOCUMENT

Complete, accurate documentation wins audits.



PRESERVE

Store securely for at least 4 years.



RESPOND

Provide records quickly and professionally.



SUCCEED

Stay compliant. Protect funding. Fuel growth.



AUDITS CAN HAPPEN.

PREPARATION PREVENTS PROBLEMS.

BE AUDIT READY. PROTECT YOUR REIMBURSEMENT.



STEP DOCUMENT VAULT™

ORGANIZE TODAY. PROTECT TOMORROW. GET REIMBURSED.

A recommended digital filing structure to keep your STEP records organized, accessible, and audit-ready.



BEST PRACTICES



Use clear folder names and keep structure consistent.



Back up regularly to the cloud and external storage.



Keep documents in PDF format whenever possible.



Date files and documents clearly.



Limit access to authorized team members.



Keep everything current and audit-ready at all times.



A WELL-ORGANIZED FILE SYSTEM

SAVES TIME. PREVENTS ERRORS. SECURES REIMBURSEMENT.



When it's time to submit, your documents are ready. Your reimbursement is secure.



ORGANIZE. PROTECT. GET REIMBURSED.

OPTIMIZE 360 MILESTONE ENGAGEMENT PROCESS™

FROM STRATEGY TO SUCCESS. WE GUIDE. YOU GROW.

A proven process that maximizes your eligibility, strengthens your mission, and secures your reimbursement.



EXPERT GUIDANCE
Seasoned global business development professionals.



MAXIMUM ELIGIBILITY
We help you qualify and stay compliant end-to-end.



SAVE TIME & RESOURCES
We manage the details so you can focus on growth.



HIGHER SUCCESS RATE
Complete, accurate submissions lead to faster reimbursements.



LONG-TERM VALUE
We don't just get you reimbursed—we help you expand.



ONE PROCESS. CLEAR MILESTONES. REAL RESULTS.



We manage the process.
You gain the opportunities.



**TOGETHER, WE TAKE YOUR BUSINESS
FURTHER—GLOBALLY.**



PROFESSIONAL NOTICE

This publication has been prepared by Optimize 360 solely for general educational and business planning purposes.

While every reasonable effort has been made to present accurate and current information, grant programs, eligibility requirements, reimbursement policies, documentation standards, funding availability, deadlines, and administrative procedures may change without notice.

Optimize 360 is not the administering authority for the Texas State Trade Expansion Program (STEP), does not determine eligibility, approve applications, or authorize reimbursements.

Each organization remains solely responsible for conducting its own independent due diligence, reviewing all current official program guidance, and obtaining appropriate legal, financial, tax, accounting, or grant advice where necessary before making business decisions or submitting applications.



ABOUT OPTIMIZE 360

Optimize 360 helps Texas companies accelerate international growth through strategic planning, export readiness, executive advisory services, international business missions, and global partner ecosystem development.



STRATEGIC
PLANNING



GLOBAL
MISSIONS



EXECUTIVE
ADVISORY



GLOBAL PARTNER
ECOSYSTEM



CONNECT WITH US



Optimize 360
Houston, Texas, USA



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VISIT OUR WEBSITE



GLOBAL INSIGHT. LOCAL COMMITMENT. REAL RESULTS.



THANK YOU FOR TRUSTING OPTIMIZE 360
AS YOUR PARTNER IN GLOBAL GROWTH.

LAST PAGE