

International Trade Mission Checklist

For governments and industry associations planning a trade mission. Prepared by Yang Global Trade & Marketing (YGTM).

Phase 1: Strategy & Planning

- Define 2–3 measurable mission objectives (signed MOUs, qualified buyer meetings, investment leads, media coverage)
- Confirm the business case for the target market (demand signals, trade agreements, existing relationships)
- Set the mission budget, including in-market costs, interpretation, and hospitality
- Confirm mission lead and level (Premier-led, ministerial, or officials-level) — this determines protocol requirements and door-opening power
- Set mission dates around anchor events (major trade shows, bilateral anniversaries) and check against local holidays and election periods
- Notify federal partners: Global Affairs Canada, Trade Commissioner Service, embassy or consulate in market
- Engage a logistics provider or in-market support partner for transportation, venues, and on-the-ground coordination
- Engage in-market partners to begin identifying meeting targets

Phase 2: Delegation, Meetings & Briefings

- Define delegate criteria (export readiness, sector fit, capacity to follow up)
- Recruit and confirm delegation — quality over quantity
- Collect delegate profiles, objectives, and one-page company summaries
- Request meetings with government counterparts, buyers, distributors, and investors
- Confirm interpreter(s) for formal meetings — brief them on terminology and sensitivities
- Book venues for receptions, roundtables, or networking events
- Arrange flights, hotels, ground transportation, and visas
- Review the Government of Canada travel advisory and assess security considerations for the delegation
- Encourage Canadian delegates to register with the Registration of Canadians Abroad service (travel.gc.ca/travelling/registration)
- Confirm delegates have travel health insurance and check recommended vaccinations for the destination
- Advise delegates on currency and payment practicalities (cash expectations, mobile payment norms, banking access in market)
- Plan the mission briefing schedule: a pre-mission briefing before departure, and on-the-ground briefings in market
- Draft the mission itinerary with realistic travel and rest time built in

Phase 3: Protocol, Cultural Preparation & Materials

- Deliver the pre-mission briefing: market context, key messages, and cultural and political sensitivities
- Prepare briefing notes for the mission lead on every counterpart (bio, titles, talking points, sensitivities)
- Confirm protocol details: order of precedence, seating plans, forms of address, flag arrangements
- Research the gifting culture of the destination and prepare appropriate gifts — value, presentation, wrapping, and the exchange moment all carry meaning, and expectations differ widely between markets
- Brief delegates on cultural etiquette: greetings, business card exchange, dining customs, dress codes, and topics to avoid
- Circulate the final itinerary with meeting schedules per delegate
- Prepare follow-up materials in advance: thank-you email and letter templates, and a system for tracking commitments made in market
- Prepare marketing and media materials (press releases, social content, photography plan)
- Confirm customs and logistics for any product samples or display materials
- Run a final logistics check: contact lists, emergency contacts, dietary requirements

Phase 4: In Market

- Hold on-the-ground briefings: short morning briefings and end-of-day debriefs with the delegation
- Assign clear roles: logistics lead, note-taker for commitments, media lead
- Capture meeting notes, business cards, photos, and every commitment made
- Monitor the schedule and adjust in real time — protect the mission lead's energy for the meetings that matter
- Post mission updates to media and social channels while in market

Phase 5: Follow-Up & Reporting

- Send thank-you emails or follow-up letters to counterparts
- Assign an owner and deadline to every commitment made in market
- Debrief with the full delegation within two weeks: objectives vs. outcomes, lessons learned, and challenges encountered, all documented for future reference
- Deliver the mission report to stakeholders with measurable results
- Identify the next step in the market: follow-up mission, incoming delegation, or partner visit