Program Accreditation and Trainer Certification

NASBITE INTERNATIONAL ANNUAL CONFERENCE
APRIL 2010
Accreditation Process
History

INITIAL TASK FORCE BEGAN WORK IN FALL OF 2008

BASIC CRITERIA PRESENTED TO BOG IN APRIL 2009

SURVEY INSTRUMENT COMPILED BY TASK FORCE

CONFERENCE ATTENDEES COMPLETED INSTRUMENT

FINDINGS COMPILED AND UTILIZED IN RECOMMENDATIONS
# Original Task Force

<table>
<thead>
<tr>
<th>Membership</th>
<th>Accomplishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madeline Grant, Chair</td>
<td>• CGBP Accreditation Development Task Force Terms of Reference</td>
</tr>
<tr>
<td>Chris Schrage</td>
<td>○ Approved BOG March 12, 2009</td>
</tr>
<tr>
<td>Cliff Paredes</td>
<td>• CGBP Accreditation Committee Terms of Reference</td>
</tr>
<tr>
<td>Caroline Tompkins</td>
<td>• CGBP Accreditation Committee Roles and Responsibilities</td>
</tr>
<tr>
<td>Maria Hladikova</td>
<td>• Drafted Accreditation criteria</td>
</tr>
<tr>
<td>Paula Murphy</td>
<td>○ Program</td>
</tr>
<tr>
<td>Tony Michalski</td>
<td>○ Trainers</td>
</tr>
<tr>
<td></td>
<td>• Initial member survey concerning accreditation</td>
</tr>
</tbody>
</table>
Current Accreditation Committee

Chris Schrage, Chair
University of Northern Iowa

Stanley Ridgley
Temple University

Allen Patch
U.S. Export Assistance Center

Jeanette Benson
Center for International Trade Development

Rene Mueller
College of Charleston

Barbara Mooney
International Trade Center-UTSA

Caroline Tompkins served for several months through the initial soft-launch trial. Jeanette Benson has now taken her position on the committee. The committee is balanced between academic institutions and trade support organizations as well as geographically.
This year’s accomplishments

- Finalized accreditation criteria
  - Approved by the Board of Governors on October 24, 2009.
- Determined application deadlines, fees
- Developed paper application forms
  - Program
  - Trainer
- Completed paper soft launch with two organizations
  - Sent in recommendations
- Received third program application
- Received several trainer applications
- Worked with Cleveland State University for electronic application process
  - Conference meetings to determine how to proceed
  - What information is needed on website
  - Timeline developed for launching site
- Some issues brought to the BOG at meeting April 7, 2010 and approved.
Web development Timeline

January 2010
Accreditation Committee
- Committee review first two applications
- Assessed of initial paper launch
- Made changes to forms to correct issues during initial assessment

February 2010
- Conference calls concerning process between AC Chair and CSU
- CSU placed static documents on the NASBITE website
- Provided development timeline

April 2010 NASBITE CONFERENCE
- Present challenges and information to Board of Governors
- Present accreditation items to membership
- Assess feedback from both groups

September 2010
- Second round of accreditation approvals by Accreditation Committee
- Assess process and report to Executive Committee
- Accreditation committee 2-day meeting at CSU with IS&T department
- Review plan for creation of online processes and procedures

October 10, 2010 to March 1, 2011
- Creation of interactive site by CSU

January/February 2011
- First electronic application trial
- Assessment of the process
- Make needed changes

April 2011 NASBITE Conference
- Formal Launch of online process Program and Trainer Accreditation Application and Review

NASBITE International - Schrage 2010
Program Accreditation

REQUIREMENTS

AS APPROVED BY THE NASBITE BOARD OF GOVERNORS & CGBP ACCREDITATION TASK FORCE ON OCTOBER 24, 2009.
Amended on April 7, 2010.

APPLICATION
ACCREDITATION REQUIREMENTS

- Completion of Program Accreditation Application.
- Program curriculum and learning objectives align with the four domains of the CGBP rubric.
- The program accreditation evaluation will consider the prerequisites for accepting students. These requirements may be based on specific courses taken previously, education levels, and/or life experience.
- Professional development programs must be in good standing with and meet or exceed minimum requirements for the organization and type of credit being provided [i.e., CPE, CLE, ...].
- University/college courses should meet or exceed the minimum requirements of the accredited offering institution.
- Prior to accreditation application, the program must have been provided to a group of participants at least two times.
### Application Requirements

<table>
<thead>
<tr>
<th>TRAINING ORGANIZATIONS</th>
<th>UNIVERSITIES/COLLEGES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shall provide the following information:</strong></td>
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</tr>
<tr>
<td>The number of CGBP training seminars organized and the number of participants each year including the focus of the training. Online offerings will submit the number of CGBP training seminars organized if not continuously offered and the number of participants each year.</td>
<td>Number of semesters/terms the course(s) have been taught with CGBP training content as defined by NASBITE International.</td>
</tr>
<tr>
<td>Program overview with training agenda</td>
<td>Syllabus(i) of supporting courses with CGBP training content as defined by NASBITE International.</td>
</tr>
<tr>
<td>A list of international trade related services</td>
<td>Requirements of any IB minor, major or certificate offered</td>
</tr>
<tr>
<td>The number of years providing international trade services or training</td>
<td>At least one instructor teaching the CGBP course should be CGBP certified or have at least 10 years trade education experience. (Note: exceptions can be made in cases that a trainer participated in the exam question writing/approval with NASBITE.)</td>
</tr>
<tr>
<td>List of trainers that are CGBP certified with resumes and/or CVs (at least one trainer from the organization must be CGBP certified or have at least 10 years trade education experience). (Note: exceptions can be made in cases that a trainer participated in the exam question writing/approval with NASBITE.)</td>
<td>A list of all program materials including but not limited to textbooks, handouts, websites, and supplemental materials that were used by trainers and participants will be reviewed prior to accreditation. (Note: The CGBP Accreditation Committee may request the applicant submit copies, samples or extracts of any or all training materials for review.)</td>
</tr>
<tr>
<td>A list of all program materials including but not limited to textbooks, handouts, websites, and supplemental materials that were used by trainers and participants will be reviewed prior to accreditation. (Note: The CGBP Accreditation Committee.)</td>
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</tbody>
</table>

NASBITE International - Schrage 2010
# Additional Criteria

<table>
<thead>
<tr>
<th>ACCREDITATION VALIDITY PERIOD</th>
<th>1) Program Accreditation will be valid for a period of three years.</th>
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</thead>
<tbody>
<tr>
<td>APPLICATION FEES</td>
<td>1) Program Accreditation fees are $400 per year or if paid up front a total of $1000 for the three years. This entitles use of the CGBP logo as stated below, listing on the NASBITE International website as an accredited program, and one contact person membership in NASBITE International.</td>
</tr>
</tbody>
</table>
| ACCREDITATION REVIEW FREQUENCY| 1) The accreditation committee will accept applications for review 2 times per year.  
2) Deadlines will be posted on the NASBITE CGBP Website. |
| CGBP LOGO USAGE               | 1) The accredited program will have the right to use the NASBITE CGBP logo on all training, marketing and promotional materials.  
2) The logo may be used as long as the program is maintains accredited status with NASBITE International. |
| CONTINUANCE OF ACCREDITATION  | 1) Completion of CGBP Program Accreditation Continuance Application.  
2) Submit proof of performance with an average CGBP exam pass rate of 75% for the past two years with at least three sittings of students during the former accreditation period.  
3) Submit documentation of any changes or updates made to program and/or trainers/educators.  
4) Continuance of CGBP Program Accreditation will be valid for three years.  
5) CGBP Program Accreditation Continuance Fees are the same as above. |
Training Program Accreditation
Application

Programs applying for the NASBITE CGBP Training Program Accreditation must complete the following application form. Credentials of trainers involved with the program must be submitted. Note that a minimum of one trainer must have attained Certified Global Business Professional Status. Credentials of all instructors must be attached to the application.

Executive Summary

This executive summary provides an overview of the success and strengths of your program. While it is essential to demonstrate that participants in the training will leave the program with a breadth of understanding of the issues affecting international trade, the application should also document the practical, operational skills acquired during your training course. A successful program will arm students with both a strategic vision of the macro issues of Global Business, while grounding them in practical, applied international trade skills and abilities.

A successful application should be well organized, addressing each of the functional areas of the CGBP; Global Management, Global Marketing, Trade Finance, and Supply Chain Management. Specific evidence will support each competency.

Applications in their entirety will be reviewed and evaluated by the CGBP accreditation committee. Committee members are appointed by the NASBITE International Board of Governors. Each member is a practicing professional in the field of global trade education. Committee members will look for a close match between documented learning objectives and the competencies detailed in the CGBP Certificate Program. Successful applicants will receive written notice of their acceptance along with specific terms and conditions of the accreditation. Successful applicants will also be informed in writing and provided with specific suggestions on the need for further documentation or program development.

The committee will accept applications from programs on two deadlines per year: February 1, and September 1. If a deadline is missed, the application can be submitted in the next application approval period. Applications should expect results no sooner than 2 months after the deadline.

A $150 non-refundable deposit must be made at the time of application. Upon approval this will be applied to the first year accreditation fees.
Instructions

Please complete the following domain rubrics with these ideas in mind.

**Trainer Qualified:** Supporting evidence is to include a CV of the trainer(s) delivering the course.

**Syllabus or Program Overview:** Provide a course syllabus and/or program overview for each course(s) supporting the noted CGBP Domain.

**Assessment Methods:** Describe how learners are assessed.

**Course Materials:** Provide a list of all supporting materials/curriculum used (do not include the actual materials).

**Other:** Provide any additional supporting evidence you deem appropriate to support your application.

Please submit evidence of the criteria with the application with a **MAXIMUM** of 10 pages in pdf format for each domain.

Send application materials to:

* Electronically to schragec@uni.edu
* Or hard copy:
  
  Chris Schrage, CGBP,
  
  CBB 261, University of Northern Iowa, Cedar Falls, IA  50614-0126

**Instructions:** Please check the squares that represent how the area of expertise is provided or measured. If learning assessments are not used to measure the level of expertise gained, those areas should be blank. The grid is to verify in what context the areas of expertise are covered.
## DOMAIN 1: Global Business Management

### Area of Expertise

**Check all that apply**

<table>
<thead>
<tr>
<th>Verification</th>
<th>Qualified Trainer</th>
<th>Synthesize program strength</th>
<th>Assess internal/external threats</th>
<th>Create an action plan</th>
<th>Other</th>
</tr>
</thead>
</table>

- Develop and/or assist in the creation of a global mission statement for the firm.
- Recognize ethical and cultural issues that are inherent in global activities and contribute to an ethical and cross-culturally sensitive business environment.
- Participate in the global business planning and long-term strategic planning processes.
- Contribute to the ongoing internal and external research efforts to determine viability of global ventures.
- Develop and/or assist in risk assessment and the development of risk management policies to support proposed global business activities.
- Develop and/or assist in internal and external legal and regulatory compliance efforts to support global activities.
- Develop and/or assist in the development, implementation, and evaluation of the global budget.
- Establish and maintain relationships with appropriate external organizations to support global activities.
- Participate in the effective use of technology to support global performance.
## Area of Expertise
*Check all that apply*

- Evaluate the internal and external environment to identify potential marketing threats and opportunities.
- Conduct market research in order to determine the best potential market.
- After analysis of the market research, select products and markets to be targeted.
- Develop and select a market strategy to maximize sales and profitability.
- Develop and implement a marketing budget related to the global activities of the company.
- Provide products and services for the targeted markets.
- Implement, monitor, and adjust the company’s global pricing strategies.
- Initiate and manage global promotion strategies in order to support the global marketing plan.
- Analyze and formulate global distribution strategies for products and/or services.
- Establish and manage global sales activities.
## DOMAIN 3: Supply Chain Management

### Area of Expertise

*Check all that apply*

<table>
<thead>
<tr>
<th>Verification</th>
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<tbody>
<tr>
<td>Trainer, Accreditation</td>
</tr>
<tr>
<td>Syllabus</td>
</tr>
<tr>
<td>Assessments</td>
</tr>
<tr>
<td>Course Materials</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

- Optimize supply chain solutions to meet the requirements of the international business plan, including evaluation of all modes of transportation, inventory, time to market, landed costs, and customer requirements.

- Evaluate and select the potential intermediaries necessary to support the international business plan.

- Complete the documents required for international movement of product and services.

- Coordinate with other departments to calculate the true costs, benefits, and risks of proposed transactions in order to implement risk management policies.

- Facilitate the offshore procurement process.
<table>
<thead>
<tr>
<th>Area of Expertise</th>
<th>Verification</th>
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</thead>
<tbody>
<tr>
<td>Assess political and economic risks and cultural issues of the target country to establish the financial costs and viability.</td>
<td></td>
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<tr>
<td>After evaluating foreign currency exchange risk, select, implement, and manage risk mitigation techniques to protect the company against fluctuation of currencies.</td>
<td></td>
</tr>
<tr>
<td>Research and analyze credit history and payment capacity of the potential buyers/partners to assess the commercial risk of the buyer and maintain credit management and control procedures and documentation.</td>
<td></td>
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<tr>
<td>Establish the most appropriate methods and terms of payment and required documentation to ensure timely payment for the sale of goods and/or services and to facilitate external financing</td>
<td></td>
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<td>Establish the most appropriate methods and terms of payment and required documentation to ensure timely payment for the sale of goods and/or services and to facilitate external financing</td>
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<tr>
<td>Select appropriate methods, terms, and currency of payment to agents, sales representatives, distributors, suppliers, and international joint ventures</td>
<td></td>
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<td>Select appropriate methods, terms, and currency of payment to agents, sales representatives, distributors, suppliers and international joint ventures.</td>
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<tr>
<td>Develop a plan to establish whether internal/external international trade financing is required.</td>
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</tr>
<tr>
<td>Identify and arrange short-term pre- and/or post-shipment finance for the seller to ensure lowest cost financing at acceptable levels of risk.</td>
<td></td>
</tr>
<tr>
<td>Identify and arrange medium- and long-term finance for the overseas buyer to allow buyer extended terms while providing case payment to seller without recourse.</td>
<td></td>
</tr>
</tbody>
</table>
Information for each person involved in the training is required

Name of Trainer:  
CGBP  Yes or No (circle)  
Attach CV  
Number of years involved in trade training:  
Number of years involved with international trade:  
Area of expertise:  (check all applicable)  
  □ Global Business Management  
  □ Global Marketing  
  □ Supply Chain Management  
  □ Trade Finance

Name of Trainer:  
CGBP  Yes or No (circle)  
Attach CV  
Number of years involved in trade training:  
Number of years involved with international trade:  
Area of expertise:  (check all applicable)  
  □ Global Business Management  
  □ Global Marketing  
  □ Supply Chain Management  
  □ Trade Finance
Trainer Certification

REQUIREMENTS
AS APPROVED BY THE NASBITE BOARD OF GOVERNORS & CGBP ACCREDITATION TASK FORCE ON OCTOBER 24, 2009.
Amended on April 7, 2010.

APPLICATION FORM

SOME APPLICATIONS RECEIVED
## TRAINER/INSTRUCTOR CERTIFICATION

As Approved by the NASBITE Board of Governors & CGBP Accreditation Task Force on October 24, 2009.

| LEVELS OF ACCREDITATION | 1) CGBP Trainer (qualified to teach all four domains)  
2) CGBP Subject Matter Expert SME - a person qualified to teach a specific domain subject |
|-------------------------|--------------------------------------------------------------------------------------------------|
| CREDENTIAL REQUIREMENTS | 1) Personally earned CGBP certification unless excused by the BOG.  
2) Three years work experience with trade and/or trade education  
3) Bachelor's Degree or equivalent work experience (at least 10 years in the specific area) |
| APPLICATION REQUIREMENTS | The application will submit:  
1) Certification application  
2) Resume or CV  
3) Two references from clients or organizations involved in the international trade and development attesting to the applicant’s expert knowledge and instructional capabilities associated with level of accreditation being applied for.  
4) A list of international trade seminars or international business courses previously taught or speaking engagements related to international trade.  
5) A list of materials developed for at least one seminar/presentation. These should include text, PowerPoint presentation, handout materials, website, etc. (Note: The CGBP Accreditation Committee may request the applicant submit copies, samples or extracts of any or all training materials for review.) |
| ACCREDITATION VALIDITY PERIOD | 1) Trainer Certification will be valid for a period of three years. |
| APPLICATION FEES | 1) Trainer Certification fees are $300. A non-refundable deposit of $150 must be made and will be applicable. |
| ACCREDITATION REVIEW FREQUENCY | 1) The accreditation committee will accept applications for review 2 times per year.  
2) Deadlines posted on the NASBITE CGBP Website. |
| CGBP LOGO USAGE | 1) The certified Trainer will have the right to use the NASBITE CGBP logo on all training, marketing and promotional materials.  
2) The logo may be used as long as the program maintains accredited status with NASBITE International. |
| CONTINUANCE OF ACCREDITATION | 1) Completion of CGBP Trainer Certification Continuance Application.  
2) Submit proof of performance with an average CGBP exam pass rate of 75% for the past two years with at least three sittings of students during the former accreditation period.  
3) Submit documentation of any changes or updates made to program and/or trainers/educators.  
4) Continuance of CGBP Trainer Accreditation will be valid for three years.  
5) CGBP Trainer Certification Continuance Fees are $300. |
Trainers applying for the NASBITE CGBP Trainer Certification must complete the following application form. Credentials of trainers involved with the program must be submitted.

**Executive Summary**

This executive summary provides an overview of the success and strengths of your program. While it is essential to demonstrate that participants in the training will leave the program with a breadth of understanding of the issues affecting international trade, the application should also document the practical, operational skills acquired during your training course. A successful program will arm students with both a strategic vision of the macro issues of Global Business, while grounding them in practical, applied international trade skills and abilities.

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The committee will accept applications from trainers on three deadlines per year: February 1 and September 1. If a deadline is missed, the application can be submitted in the next application approval period. Applications should expect results no sooner than 2 months after the deadline.
## Trainer Information

<table>
<thead>
<tr>
<th>Trainer Name:</th>
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<tr>
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<tr>
<td>Address:</td>
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<td></td>
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<tr>
<td>City:</td>
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<td>Country:</td>
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<td>Email:</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Telephone number:</td>
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<tr>
<td></td>
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<tr>
<td>Trainer website:</td>
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</tbody>
</table>
Please complete the following domain rubrics with these ideas in mind.

**Trainer Qualified:** Supporting evidence is to include a CV of the trainer(s) delivering the course.

**Syllabus or Program Overview:** Provide a course syllabus and/or program overview for each course(s) supporting the noted CGBP Domain.

**Assessment Methods:** Describe how learners are assessed.

**Course Materials:** Provide a list of all supporting materials/curriculum used (do not include the actual materials).

**Other:** Provide any additional supporting evidence you deem appropriate to support your application.

Please submit evidence of the criteria with the application with a maximum of 10 pages in pdf format for each domain.

Name of Trainer:
CGBP Yes or No (circle)
Attach CV
Number of years involved in trade training:
Number of years involved with international trade:
Area of expertise: (check all applicable)
- Global Business Management
- Global Marketing
- Supply Chain Management
- Trade Finance
Send application materials to:
Electronically to schragec@uni.edu
Or hard copy:
Chris Schrage, CGBP,
CBB 261, University of Northern Iowa, Cedar Falls, IA 50614-0126

$150 non-refundable deposit is required with deposit, if approved will be applied to the 3 year certification fee.

Instructions: Please check the squares that represent how the area of expertise is provided or measured. If learning assessments are not used to measure the level of expertise gained, those areas should be blank. The grid is to verify in what context the areas of expertise are covered.
## DOMAIN 1: Global Business Management

### Area of Expertise

*Check all that apply*

<table>
<thead>
<tr>
<th>Verificaion</th>
<th>Signature of completion of overview</th>
<th>Assumptions and evidence</th>
<th>Course materials</th>
<th>Other</th>
</tr>
</thead>
</table>

- Develop and/or assist in the creation of a global mission statement for the firm.
- Recognize ethical and cultural issues that are inherent in global activities and contribute to an ethical and cross-culturally sensitive business environment.
- Participate in the global business planning and long-term strategic planning processes.
- Contribute to the ongoing internal and external research efforts to determine viability of global ventures.
- Develop and/or assist in risk assessment and the development of risk management policies to support proposed global business activities.
- Develop and/or assist in internal and external legal and regulatory compliance efforts to support global activities.
- Develop and/or assist in the development, implementation, and evaluation of the global budget.
- Establish and maintain relationships with appropriate external organizations to support global activities.
- Participate in the effective use of technology to support global performance.
**Area of Expertise**  
*Check all that apply*

<table>
<thead>
<tr>
<th>Verification</th>
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</thead>
<tbody>
<tr>
<td>Strategies or programs</td>
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</tbody>
</table>

- Evaluate the internal and external environment to identify potential marketing threats and opportunities.
- Conduct market research in order to determine the best potential market.
- After analysis of the market research, select products and markets to be targeted.
- Develop and select a market strategy to maximize sales and profitability.
- Develop and implement a marketing budget related to the global activities of the company.
- Provide products and services for the targeted markets.
- Implement, monitor, and adjust the company’s global pricing strategies.
- Initiate and manage global promotion strategies in order to support the global marketing plan.
- Analyze and formulate global distribution strategies for products and/or services.
- Establish and manage global sales activities.
## Area of Expertise

*Check all that apply*

<table>
<thead>
<tr>
<th>Verification</th>
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</thead>
<tbody>
<tr>
<td>Syllabus or program overview</td>
</tr>
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</table>

- **Optimize supply chain solutions to meet the requirements of the international business plan, including evaluation of all modes of transportation, inventory, time to market, landed costs, and customer requirements.**

- **Evaluate and select the potential intermediaries necessary to support the international business plan.**

- **Complete the documents required for international movement of product and services.**

- **Coordinate with other departments to calculate the true costs, benefits, and risks of proposed transactions in order to implement risk management policies.**

- **Facilitate the offshore procurement process.**
### DOMAIN 4: Trade Finance

<table>
<thead>
<tr>
<th>Area of Expertise</th>
<th>Verification</th>
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<tbody>
<tr>
<td>Assess political and economic risks and cultural issues of the target country to</td>
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<td>establish the financial costs and viability.</td>
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<td>After evaluating foreign currency exchange risk, select, implement, and manage</td>
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<td>risk mitigation techniques to protect the company against fluctuation of currencies</td>
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<tr>
<td>Research and analyze credit history and payment capacity of the potential buyers</td>
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<td>partners to assess the commercial risk of the buyer and maintain credit management</td>
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<td>and control procedures and documentation.</td>
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<tr>
<td>Establish the most appropriate methods and terms of payment and required</td>
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<td>documentation to ensure timely payment for the sale of goods and/or services</td>
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<td>and facilitate external financing.</td>
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<td>Establish the most appropriate methods and terms of payment and required</td>
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<td>documentation to ensure timely payment for the sale of goods and/or services</td>
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<td>and facilitate external financing.</td>
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<td>Select appropriate methods, terms, and currency of payment to agents, sales</td>
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<td>representatives, distributors, suppliers, and international joint ventures.</td>
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<td>Select appropriate methods, terms, and currency of payment to agents, sales</td>
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<td>representatives, distributors, suppliers and international joint ventures.</td>
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<td>Develop a plan to establish whether internal/external international trade financing</td>
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<td>is required.</td>
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<td>Identify and arrange short-term pre- and/or post-shipment finance for the seller</td>
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<td>to ensure lowest cost financing at acceptable levels of risk.</td>
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<td>Identify and arrange medium- and long-term finance for the overseas buyer to</td>
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<td>allow buyer extended terms while providing case payment to seller without</td>
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<td>recourse.</td>
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