



**Agency Priority Goal | Action Plan | FY 2022 – FY 2023**

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# Strengthen the global competitiveness of American businesses

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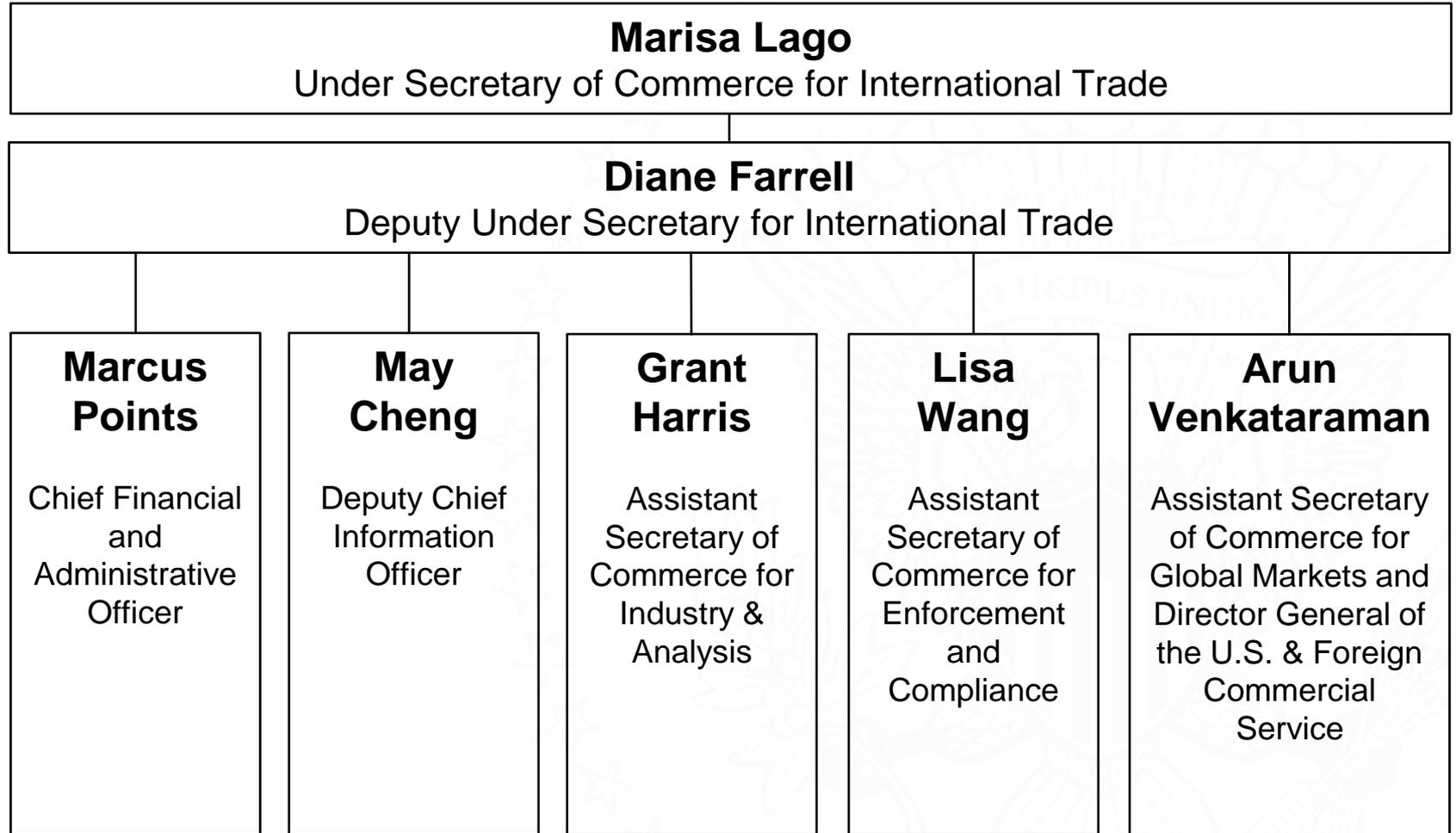
**Goal Leaders:**

Goal Leader: Marisa Lago, Under Secretary of Commerce for International Trade

Deputy Goal Leader: Diane Farrell, Deputy Under Secretary for International Trade

# Goal Team

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# Goal Overview

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## Goal Statement

- By September 30, 2023, in support of expanding the global footprint of American small and medium-sized enterprises (SMEs) and enhancing its accessibility and assistance to businesses in underserved communities, the International Trade Administration (ITA) will accelerate its digital transformation to double the annual number of clients assisted from 38,000 in FY 2020 to 76,000 in FY 2023, with a particular focus on SMEs and the Nation's underserved communities.

## Problem to Be Solved

- While SMEs—including those in underserved communities—represent most American businesses and contribute significantly to innovation, job creation, and economic growth, they continue to face significant barriers to exporting. Better awareness of ITA's programs and resources could help them address these barriers.
- ITA needs to leverage digital transformation to modernize its service delivery across all digital channels. Doing so would allow ITA to raise awareness of its programs and resources, particularly with SMEs and underserved communities, as well as to better capture clients accessing ITA's technology-driven solutions available to them.

## What Success Looks Like

- As a result of these digital enhancements and through targeted outreach and engagement, ITA will be able to fully capture the clients it assists and help more U.S. SMEs and underserved businesses to gain awareness of and timely access to trade promotional resources and assistance to become successful exporters, grow internationally, and create U.S. jobs.

# Goal Overview

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While U.S. SMEs comprise 99 percent of domestic firms and contribute to 44 percent of gross domestic product, they account for only one third of U.S. exports. To help SMEs and underserved businesses to overcome the challenges associated with exporting, ITA will enhance the accessibility to its trade programs and resources through a series of digital milestones in fiscal years 2022 and 2023. This digital transformation will both broaden ITA's network, programs, and services to attract clients as well as improve the ability to more accurately account for the number of clients assisted. ITA-wide efforts include:

- **Digital Transformation** – ITA will update and expand its use of technology to improve operations and achieve higher productivity and innovation, upgrade and tailor online services to meet the needs of different customers, and continuously enhance and deploy technology as new capabilities are brought to market.
- **Priority Technology Enhancements** – ITA will identify and acquire the digital tools needed to modernize the customer experiences of its clients. This includes, but is not limited to:
  - Implementing an event technology solution to manage and seamlessly deliver events worldwide.
  - Building out video conferencing features for staff to virtually engage with clients.
  - Deploying a digital experience platform to provide clients with personalized access across ITA's digital touchpoints and enable ITA to capture information on specific client interests and needs.
- **Improved Website Design** – ITA will make the trade.gov website navigation more approachable and intuitive. It will also enhance digital marketing and outreach efforts to acquire and assist more clients—particularly SMEs and underserved communities.
- **Implementation Phases** – ITA will collect baseline data on current use of digital services to better understand user volume, problems needs, and preferences, and make design recommendations based on this analysis.
- **Expand Services to Enforcement of Unfair Trade Practices Actions** – ITA will leverage existing resources to disseminate information on how to resolve unfair trade practices.

# Goal Strategies

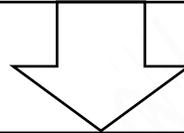
## **Strategy 1: Transform ITA's Business Processes, Workforce, and Culture**

to more efficiently and effectively assist clients by fully leveraging digital solutions.

Conduct a pilot program to improve ITA's virtual assistance through digital channels.

Implement self-service dashboards for ITA staff to view web analytics for trade.gov in real time to build a culture of continuous improvement through digital engagement.

Train staff on new digital solutions implemented by ITA and the skillsets needed to assist clients across digital and non-digital channels.



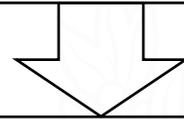
## **Strategy 2: Attract and Acquire New Clients**

particularly SMEs and underserved communities, through digital content and omnichannel marketing tools and event/service offerings

Improve the quality of ITA's digital content and expand the breadth and depth of information available to clients on ITA's website (trade.gov).

Enhance ITA's marketing campaigns through IT automation and private-public sector best practices.

Expand outreach to underserved communities through the Global Diversity Export Initiative (GDEI), Women's Global Trade Empowerment program, and Rural Export Center (REC).



## **Strategy 3: Capture Clients Assisted Online and Offline**

through a digital experience platform and event/service technology solutions.

Implement a digital experience platform to provide clients with personalized access across ITA's digital touchpoints and to enable ITA to capture clients assisted online.

Modernize ITA's delivery of events and services through best-in-class technology solutions that expand access to ITA's assistance and ensure participants are captured as clients assisted.

Stakeholder data analysis will enable ITA to improve its provision of information and enforcement and compliance services digitally.

# Goal Targets

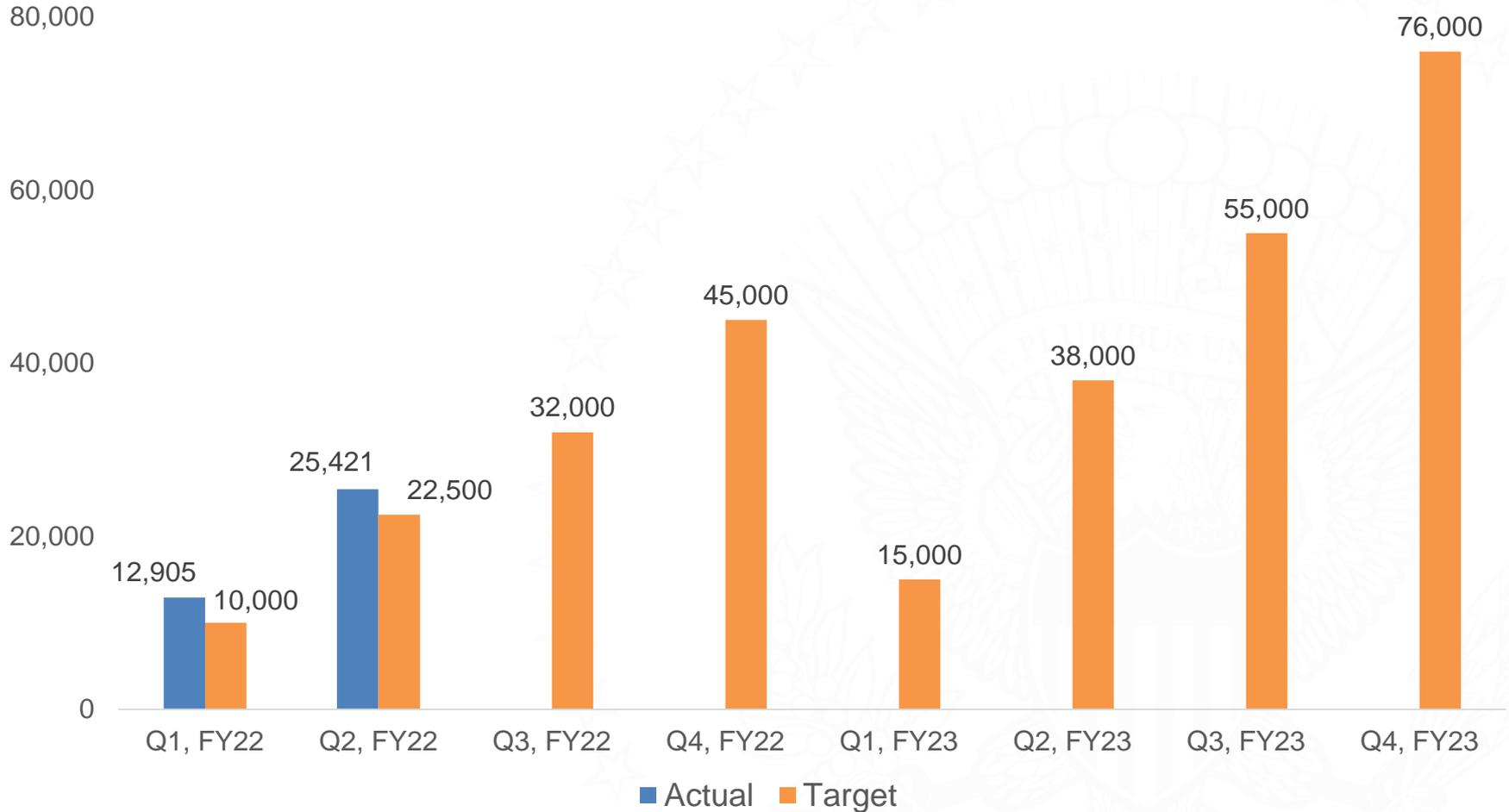
Achievement statement		Key indicators	Quantify progress			Frequency
By...	We will...		Name of indicator	Target value	Starting value*	Current value Q2 FY022
09/30/2023	Double ITA Clients Assisted	Number of export and investment clients assisted	76,000	38,000	25,421	Quarterly
9/30/2023	Ensure over 80% of U.S. exporter clients assisted are SMEs	SME percentage of U.S. exporter clients assisted	80%	86%	84%	Quarterly
9/30/2023	Focus outreach on the nation's underserved communities	Number of clients assisted in underserved communities	11,500	5,700	4,142	Quarterly

By September 30, 2023, in support of expanding the global footprint of American small and medium-sized enterprises (SMEs) and enhancing its accessibility and assistance to businesses in underserved communities, the International Trade Administration (ITA) will accelerate its digital transformation to double the annual number of clients assisted from 38,000 in FY 2020 to 76,000 in FY 2023, with a particular focus on SMEs and the Nation's underserved communities.

\*Note that the starting values listed in the table above are FY 2020 actuals, which ITA used as the baseline for this APG during its development in FY 2021. Definitions of these indicators are provided on slides 13 and 14.

# Key indicators

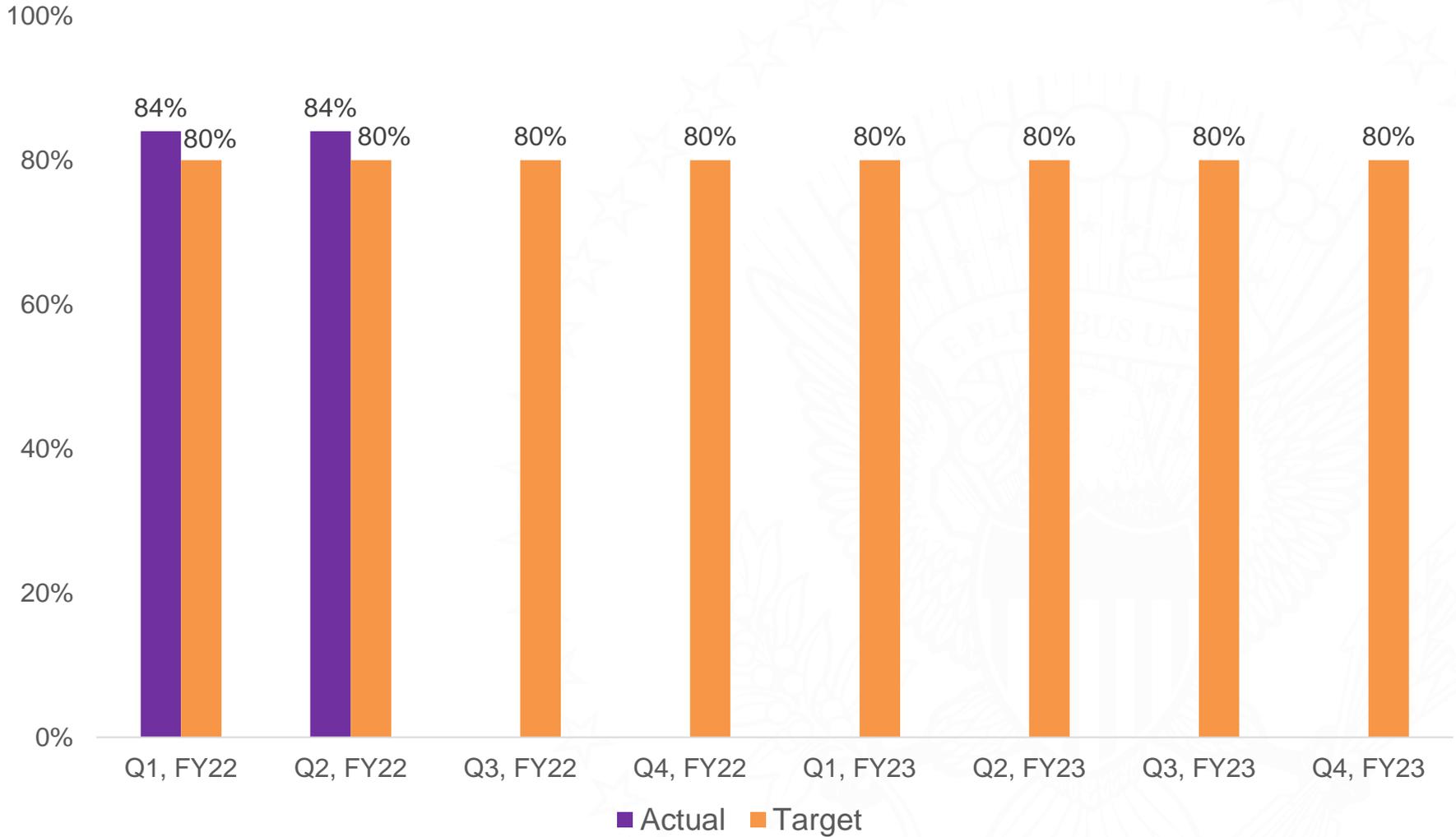
## Number of Export and Investment Clients Assisted\*



\*Actual and target numbers reported are cumulative over the associated fiscal year. Please note that ITA's APG is to double the annual number of clients assisted from 38,000 in FY 2020 to 76,000 in FY 2023. ITA achieved 42,462 clients assisted in FY 2021 and seeks to increase the annual number in FY 2022 to 45,000 and then to 76,000 in FY 2023.

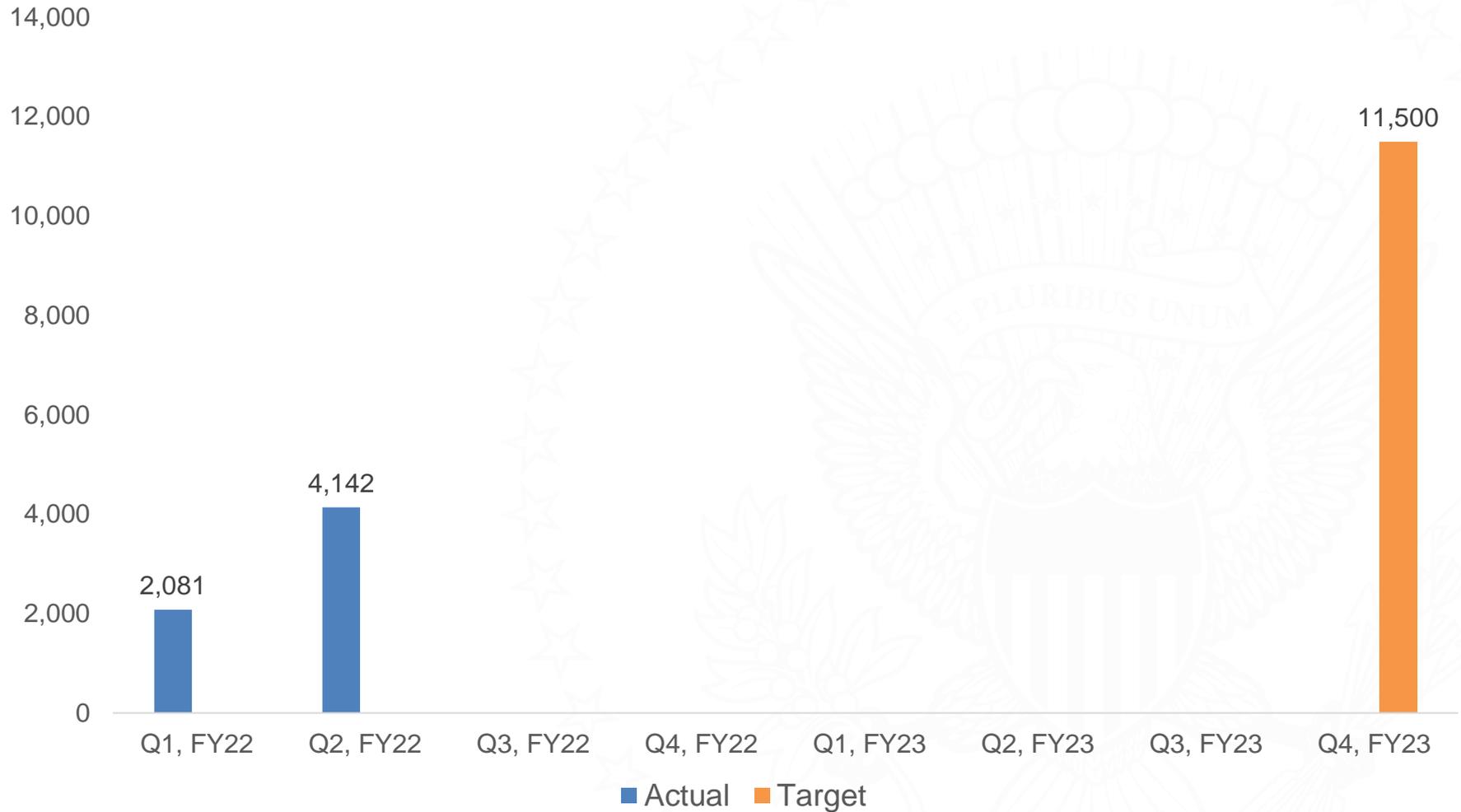
# Key indicators

## SME Percentage of U.S. Exporter Clients Assisted



# Key indicators

## Number of Clients Assisted in Underserved Communities\*



\* Note that the target value is for the two-year lifecycle of the APG, with a starting value based on FY 2020 data.

# Key milestones

## Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Comments
<b>Transforming Service Delivery*</b>					
WebEx Training and Build Out	Q2, FY22	Complete			
Self-service Dashboards	Q3, FY22	On Track			
Event Technology Solution	Q4, FY22	Delayed			Milestone is expected to be met in Q2 of FY 2023 due to the length of the procurement process.
Digital Experience Platform	Q4, FY22	On Track			
I&A Digital Assistance Pilot	Q4, FY22	On Track			
Enhanced Marketing Campaigns	Q1, FY23	On Track			
Website Optimization	Q1, FY23	On Track			
Digital Content Quality & Expansion	Q1, FY23	On Track			
Service Technology Solution	Q3, FY23	On Track			
AI Chatbot	Q3, FY23	On Track			
<b>Equity &amp; Inclusion</b>					
Global Diversity Export Initiative	Q4, FY23	On Track			
Women's Global Trade Empowerment	Q4, FY23	On Track			
Rural America's Intelligence Service for Exporters	Q4, FY23	On Track			
<b>Expanded Service Delivery</b>					
Implement new tools and visualizations	Q4, FY23	On Track			Milestone was adjusted to better demonstrate ITA's activities in support of the APG.

\* Milestones listed under Transforming Service Delivery, as part of ITA's digital transformation, are designed to provide enhanced service delivery to SMEs and underserved communities. ITA is reframing its approach towards some of the key milestones which could impact the timeline of their completion. ITA does not expect this to impact its ability to achieve the APG.

# Narrative – FY 2022 Q2

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ITA is **On Track** to accomplish its APG. Through FY 2022 Q2, ITA assisted 25,421 clients, exceeding its quarterly target of 22,500. SMEs represented 84 percent of clients assisted with 4,142 from underserved U.S. communities. The combined impact of ITA's assistance in Q2 is estimated to support over 240,000 U.S. jobs.

ITA's newly procured WebEx conferencing platform is actively used from high-level Secretarial events to ITA-hosted business seminar and webinars worldwide. ITA has trained most of its staff on the use of WebEx and continues to enhance the platform with additional capabilities, such as Simultaneous Interpretation, Transcription and Closed captioning, and Translator and Webex Assist Services. Since the beginning of FY 2022, ITA has successfully used WebEx to deliver over 2,200 virtual events to approximately 28,000 participants.

ITA completed market research on event technology solutions and began the procurement process for acquiring a platform that integrates with ITA's customer relationship management (CRM) and thereby captures clients assisted at ITA events. In addition, ITA conducted market research on digital experience platforms and is evaluating the funding required and budget available in FY 2022 to move forward with a procurement this fiscal year.

ITA boosted its outreach and assistance to the underserved business community through several key initiatives:

- ITA's REC and Rural Team organized and/or participated in 250 outreach events to support rural underserved communities. The REC has also completed 180 customized market research services specifically for rural SMEs.
- The inaugural Women Empowered Leave Legacies through Trade and Investment (WELLTI) Summit, as part of ITA's Global Diversity Export Initiative (GDEI), occurred alongside TradeWinds and brought together approximately 300 businesswomen (in-person and via livestreaming) to learn from government and industry leaders about how to be successful in global markets, key export resources, and growing their professional networks and businesses.
- The Minority Business Development Agency (MBDA) partnered with ITA's GDEI in Q2 to co-host a customized International Trade Resource Training series for the 75 National Network of MBDA Export Centers, Business Centers, and management. Nine sessions featured ITA employees and other Trade Promotion Coordinating Committee partners to educate the MBDA National Network comprehensively about the various aspects of international trade services and resources. This partnership epitomizes the intentions of multiple Executive Orders that promote and support economic impact of underserved businesses and communities.

# Narrative – FY 2022 Q2

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ITA continued progress with its Digital Assistance Pilot, which includes an initial focus on the ITA Market Development Cooperator Program (MDCP) to expand capacity for digital engagements with existing stakeholders through digital channels and outreach to underserved organizations.

- ITA optimized MDCP website content based on three different customer journeys with the online goals of providing ongoing guidance to current awardees, educating a more diverse audience, determining potential interest of prospective MDCP applicants, and increasing the number of online applications. By targeting an MDCP niche audience (e.g., trade associations, chambers of commerce, and other non-profit organizations), ITA can actively identify a more diverse pool of qualified applicants.
- In FY 2022 Q2, the optimized website content proved to be a successful outreach tool for the MDCP, making the information discoverable by a more diverse group of organizations across the United States. MDCP has already received more than double the number of eligible inquiries compared to prior year competitions. ITA provided online assistance to current cooperators 315 times, educated over 1,736 potential applicants about the MDCP, and provided eligibility criteria to nearly 200 entities.

ITA expanded its outreach and dissemination efforts pertaining to trade remedies and foreign trade zones.

- In Q2, ITA deployed a Power BI visualization tool on its website to present current trade remedy orders in a user-friendly format, which assists clients in making better informed business decisions.
- ITA deployed an antidumping and countervailing duty proceeding search tool on its website that provides customers with descriptions of products involved in trade remedy proceedings and the relevant deadlines that can impact duty collection at the U.S. border. This user-friendly tool has made trade remedy proceeding information more transparent and accessible to the public.
- ITA deployed a modernized Online Foreign Trade Zone Information System (OFIS) on its website, which provides readily accessible information to users.

# Data accuracy & reliability

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Clients are ITA's external customers. They include individual businesses, industry associations, trade organizations, state economic development organizations (EDOs), educational institutions, and foreign investors. Please note that internal customers such as DOC or ITA Senior Leaders and other ITA business units are not considered clients for the purpose of this performance measure.

## **Total Number of Clients Assisted** (by traditional or digital means)

- Encompasses total clients assisted across ITA's export and investment functional areas and irrespective of size and mode of assistance (i.e., offline through traditional fee and non-fee-based assistance as well as digital/online assistance). The data are generated from ITA's Customer Relationship Management (Salesforce) database.
  - Unique Export Clients Assisted (by traditional means): Total clients assisted with either an Export Promotion, Commercial Diplomacy, or Advocacy activity, or a case opened/closed in Salesforce. Regardless of whether the exporter client was assisted multiple times, that assistance is deduplicated and the client counts only once. Export Clients must be U.S.-based such that the organization's country, or the country of its global parent, is the United States.
  - Unique Digital Clients Assisted (by only digital means): U.S. companies that are active consumers of ITA-generated digital content such as export mechanics, industry and market intelligence, country commercial guides, and website registrants.
- The term unique signifies that each client (organization, not contact) is only counted once, regardless of the depth (activity versus case) or breadth (number of times) of ITA's assistance.

## **SME Percentage of U.S. Exporter Clients Assisted** (contextual indicator)

- Data are generated from the Dun & Bradstreet Corporation (D&B). SMEs are defined as U.S. companies with 1,000 or less employees, including global and parent companies.
- The SME percentage of U.S. exporter clients assisted is the portion of SME clients of all clients assisted (SMEs and large companies) in the given time period. Organizations without size data are excluded from this calculation.

# Data accuracy & reliability

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## **Number of Underserved Community Clients Assisted** (contextual indicator)

- Given its mission, ITA is focused on increasing assistance to small businesses from underserved communities, disadvantaged by historically limited access to trade resources, vulnerable to sudden economic shocks, and interested in becoming or growing as U.S. exporters. ITA defines underserved clients assisted as ***small U.S. businesses in underserved communities including socially and economically disadvantaged populations such as African American, Asian American and Pacific Islander, Hispanic American, Native American, service-disabled veteran-owned businesses, rural businesses, women-owned businesses, and LGBTQI+-owned businesses that seek to become or grow as U.S. exporters.***
- In defining small businesses, ITA follows the U.S. Small Business Administration (SBA) industry size standards established under the North American Industry Classification System (NAICS). For guidance on minority, veteran, women-owned, and rural businesses, ITA draws from the Minority Business Development Agency (MBDA), SBA, U.S. Census Bureau (Census), and U.S. Department of Agriculture (USDA) sources and programs, as follows:
  - SBA: Underserved communities (sba.gov).
  - SBA/MBDA Minority-owned: 8(a) Business Development program (sba.gov).
  - The federal government fully defines who qualifies for the 8(a) program—including what counts as being socially and economically disadvantaged—in Title 13 Part 124 of the Code of Federal Regulations (CFR).
  - Rural: As defined by the USDA Rural Development and Census rural-urban commuting area (RUCA) codes (based on the organization's zip code location). The rural-urban commuting area (RUCA) codes classify U.S. census tracts using measures of population density, urbanization, and daily commuting.
- ITA is committed to increasing its outreach and assistance to *all groups* within the underserved community through a diversified strategy—including digital enhancements, purpose-driven initiatives, and various outreach efforts—to broaden access to its network, trade resources, and services.

# Data accuracy & reliability

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## **Number of Underserved Community Clients Assisted** (contextual Indicator) (continued)

- All underserved business data that ITA gather to measure the number of underserved clients assisted come from ITA's Client Relationship Management (CRM) database. Data for minority- and women-owned businesses are generated from D&B's [optimizer for data management](#), which links to the CRM. In situations where D&B does not provide the data, and ITA has separate documentation attesting that the U.S. organization is at least 51 percent owned, operated, and controlled by a minimum of one U.S. citizen whose ethnic background is at least 25 percent Asian-Indian, Asian-Pacific, Black, Hispanic, or Native American; or controlled by a minimum of one U.S. citizen whose gender is female, ITA can manually select that client's minority- or woman-owned status in the CRM. Data on rural-owned businesses stem from the organization's zip code location. ITA uses [RUCA codes](#) (4-10). If the zip code is located in a rural RUCA code, then that business will be marked as a rural client.

# Additional information

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## **Contributing Programs**

### Organizations:

- International Trade Administration (ITA)

### Program Activities:

- ITA Global Markets (GM)
- ITA Industry & Analysis (I&A)
- ITA Enforcement & Compliance (E&C)
- ITA Office of the Chief Information Officer (OCIO)

### President's Management Agenda:

- Priority 2: Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience.

### Policies:

- Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government.
- Executive Order 14058: Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government.