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

Strengthen the global competitiveness of American businesses

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Goal Overview

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

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 Digital Services to Enforcement of Unfair Trade Practices Actions** – ITA will use digital tools to disseminate information on how to report unfair trade practices.
Goal Strategies

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

- 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**

- 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**

- 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**
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.

<table>
<thead>
<tr>
<th>By…</th>
<th>We will…</th>
<th>Name of indicator</th>
<th>Target value</th>
<th>Starting value**</th>
<th>Current value Q1 FY022</th>
<th>Update cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/30/2023</td>
<td>Double ITA Clients Assisted</td>
<td>Number of export and investment clients assisted</td>
<td>76,000</td>
<td>38,000</td>
<td>12,905</td>
<td>Quarterly</td>
</tr>
<tr>
<td>9/30/2023</td>
<td>Ensure over 80% of U.S. exporter clients assisted are SMEs</td>
<td>SME percentage of U.S. exporter clients assisted</td>
<td>80%</td>
<td>86%</td>
<td>84%</td>
<td>Quarterly</td>
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<tr>
<td>9/30/2023</td>
<td>Focus outreach on the nation’s underserved communities</td>
<td>Number of clients assisted in underserved communities</td>
<td>11,500</td>
<td>5,700</td>
<td>2,081</td>
<td>Quarterly</td>
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**Key indicators**

**Quantify progress**

**Frequency**

**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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Actual</th>
<th>Target</th>
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<tr>
<td>Q1, FY22</td>
<td>84%</td>
<td>80%</td>
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<tr>
<td>Q2, FY22</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Q3, FY22</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Q4, FY22</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Q1, FY23</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Q2, FY23</td>
<td>80%</td>
<td>80%</td>
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<td>Q3, FY23</td>
<td>80%</td>
<td>80%</td>
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<tr>
<td>Q4, FY23</td>
<td>80%</td>
<td>80%</td>
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</tbody>
</table>
Key indicators

**Number of Clients Assisted in Underserved Communities***

- **Q1, FY22**: 2,081
- **Q2, FY22**: Actual 0
- **Q3, FY22**: Target 11,500
- **Q4, FY22**: Actual 0
- **Q1, FY23**: Actual 0
- **Q2, FY23**: Actual 0
- **Q3, FY23**: Actual 0
- **Q4, FY23**: Actual 0

*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

<table>
<thead>
<tr>
<th>Milestone Summary</th>
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<tbody>
<tr>
<td>Key Milestone</td>
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<tr>
<td>Transforming Service Delivery*</td>
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<tr>
<td>WebEx Training and Build Out</td>
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<td>Self-service Dashboards</td>
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<tr>
<td>Event Technology Solution</td>
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<td>Digital Experience Platform</td>
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<td>I&amp;A Digital Assistance Pilot</td>
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<tr>
<td>Enhanced Marketing Campaigns</td>
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<td>Website Optimization</td>
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<td>Digital Content Quality &amp; Expansion</td>
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<td>Service Technology Solution</td>
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<td>AI Chatbot</td>
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<td>Equity &amp; Inclusion</td>
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<td>Global Diversity Export Initiative</td>
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<tr>
<td>Women's Global Trade Empowerment</td>
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<tr>
<td>Rural America’s Intelligence Service for Exporters</td>
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<tr>
<td>Expanded Digital Services Delivery</td>
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<td>E&amp;C’s First-Ever Data Set</td>
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* 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 **On Track** to accomplish this APG. In Q1 of FY 2022, ITA assisted 12,905 clients, thus exceeding its quarterly target. SMEs represented 84 percent of clients assisted with 2,081 in underserved U.S. communities. The combined impact of ITA’s assistance in Q1 is estimated to support over 34,000 American jobs.

ITA made meaningful progress towards accomplishing the milestones needed to double the annual number of clients assisted by the end of FY 2023. ITA trained staff on how to use its newly procured WebEx conferencing platform and delivered over 973 virtual services and events to over 14,000 U.S. and foreign participants.

ITA also completed market research on event technology solutions and began the procurement process (to be finalized in Q2) 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 remains on track to begin the procurement process in FY 2022 Q2.

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

- ITA selected a GDEI team lead to coordinate ITA’s underserved community export efforts, established its GDEI website ([https://www.trade.gov/global-diversity-export-initiative](https://www.trade.gov/global-diversity-export-initiative)), and launched GDEI efforts with two educational webinars that drew over 1,000 GDEI U.S. SMEs from across the country.
- ITA’s REC organized 49 export promotion events focused on outreach to underserved communities and participated in an additional 52 outreach activities hosted by partner organizations.
- ITA’s Women Empowered Leave Legacies through Trade and Investment (WELLTI) program launched a series of ‘Coffee Chats’ and roundtables with businesswomen and executives across the Middle East and Africa (MEA) region. A Q1 FY 2022 ‘Coffee Chat’ focused on Women-in-Tech and featured Secretary of Commerce Gina Raimondo and Princess Reema bint Bandar Al Saud of the Kingdom of Saudi Arabia.
- ITA continued progress with its Digital Assistance Pilot in FY 2022 Q1, which includes an initial focus on the ITA Market Developer Cooperator Program (MDCP) to expand capacity for digital engagements with existing stakeholders through digital channels and outreach to underserved organizations.
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.
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, Veteran & Service-Disabled Owned Businesses, Rural-owned Businesses, Women-Owned Businesses, and LGBTQI+ 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.
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.
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:

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.