

ABC ADVISORS PROPOSAL

TO

XYZ

RFP: PROJECT ON PROMOTION OF...

Submission Deadline: xxx

Submit to:

xxx



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1.3. Operating Procedure & Method

Phase A: Select Specified Targets

Stage 1: Delineate Parameters

Below are some of the important classifications and criteria we will apply when selecting specified targets. Once we begin the project, we will be able to refine our lists based on further input from ABC.

Sector Classifications:

- Manufacturing
- Automotive
- Software
- Food and Beverage

Qualifying Criteria:

1. Size of company—revenue and staff (must meet one or more of the criteria below):
 - a. Revenue in excess of \$xM (manufacturers) or \$xM (services);
 - b. Cumulative funding in excess of \$xM;
 - c. Staff of more than 100.
2. Must operate an X Country entity OR be suitable for the X Country market.
3. Total qualifying companies total estimated to be 500+ (100 in each vertical).

Stage 2: Activate Advisory Network & Company Research

1. Enable “sales” advisory network. Leverage multiple executive-level contacts for each key vertical for introductions and market intelligence to identify companies with potential to expand in X Country. (See section “4. Enhancing Project Outcome” for more details.)
2. XYZ will conduct further research of companies that meet qualifying criteria in Stage 1 to develop an understanding of each business’s current status and potential interest in the subsidy program. We will consider the following:
 - a. Recent growth and anticipated expansion plans for the company in X region.
 - b. Current and potential size of customer base in the X Country market.
 - c. For companies ascertained to have potential to expand existing operations or enter the X Country market, does X Country present at least one competitive advantage

over other regional countries under consideration for increased investment that would satisfy criteria for program? These would include, but not be limited to:

- i. Proximity to key customer base or partner ecosystem in designated area;
- ii. Benefit from establishing strong local presence to serve the domestic market;
- iii. Potential for growth in the domestic market directly resulting from increased capital investment;
- iv. Access to universities, research institutions, and human capital with the required technical knowledge and skills;
- v. M&A opportunities to accelerate growth or satisfy requirements for technology and human capital.

Stage 3: Identify 100 Highest Potential Targets

Based on evaluation of target companies in consideration of satisfying research criteria, we will select a total of at least 100 companies to submit to ABC in the format specified, ranked according to preference.

In making the list, XYZ Advisors will capitalize on our human network, knowledge about industries, experience in attracting companies to X Country, and information provided by ABC. The specified targets will include companies recommended by XYZ Advisors as well as any companies specified by ABC.

Some of our ideas about how to prioritize between companies include the following:

1. Based on initial screenings, likelihood of investment within 12 months. During meetings with companies, likelihood of investing within 6 months.
2. Companies that are actively seeking opportunities to increase their presence in specified region through M&A, organic growth, or additional investment.
3. Somewhat subjective analysis of interest based on conversations with executives, feedback from the market, etc.

We will consult with and receive approval from ABC for the reasoning and evaluation standard for company selection and the priority ranking before actual execution.

Phase B: Contact Specified Targets

1. XYZ Advisors will contact each company directly to discuss their ambitions for the X Country and regional markets and to explore the possibility of an interest in the program.
 - a. We will contact multiple executives at each specified target company to identify the key stakeholder(s) in decision making related to X Country.

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- b. We will approach executives at both the US and X Country entities.
 - c. In the event of a company requiring immediate follow up, we will notify ABC within 24 hours and seek formal approval to begin preparing our strategy to approach these companies prior to submission of the report.
2. We will submit a report to ABC in the format provided at the end of this phase summarizing all discussions with each company and offering recommendations for future actions.
 3. We anticipate identifying at least 10 companies with both interest and potential to qualify for the program. These companies will be highlighted in the report submitted to ABC during Phase C.
 4. Due to the amount of time that may be required by some companies to internally approve new investments, we will accelerate this phase of the project, completing it by required date.
 5. Depending on the nature of feedback, we may seek approval from ABC to begin Phase C. prior to completing Phase B. if needed.
 6. In the event that new companies are identified during this phase, we will notify ABC and will request permission to approach.
 7. Should it appear that the target company list is not sufficient to satisfy the requirement of identifying at least 10 companies for Phase C., we will notify ABC at the earliest possible time and seek permission to expand the list of target companies.

Phase C: Strategy for Approaching Specified Targets

1. XYZ Advisors will submit a list of at least 10 high-priority companies to ABC on the forms provided, along with the reports and materials to be used in making proposals to the companies during in-person meetings.
2. We will create individual proposals for each target company and will include any additional information provided directly by ABC.
3. Following approval from ABC, we shall make arrangements for Phase D.

Phase D: Proposing Investment into X Country to Specified Targets

1. We will arrange face-to-face meetings with the companies identified during Phase C. and coordinate with ABC as early as possible to ensure that an ABC representative can attend the meetings.
2. We will report back to ABC using the forms provided, updating the report from Phase B. (if needed), and highlighting to ABC the key information requirements for Phase E.

Phase E: Creating Follow-Up Strategies to the Specified Targets

1. Based on the results of proposals made during meetings in Phase D., we will develop individual strategies for following up with each company.
2. We will receive prior approval from ABC before communicating directly with companies.

Phase F: Follow up with Specified Target

1. We will continuously follow up with companies specified in Phase E., meeting all companies in-person with an ABC representative when possible.
2. We will submit a report documenting all follow-up activities on the forms provided by ABC.

Phase G: Confirmation of the Corporate Registration in X Country

XYZ Advisors will submit a final report to ABC about the new corporate entities or other types of investment, which must be approved by ABC.

4. Enhancing Project Outcome

Several aspects of our proposal are unique and will significantly enhance ABC's project outcome. The following are elements original to our approach:

Expansive Research Pool

We intend to begin with an expansive initial pool of potential companies. This extensive initial pool will support identifying 100 or more, high-potential target companies to ensure that we meet our commitment of at least 10 in-person meetings and the ultimate goal of increasing FDI.

The increased number of companies on our target list will also safeguard the ultimate success of the project in the event of any unexpected delays or hurdles.

Accelerated Timeline

We have also accelerated the timeline laid out by ABC in the RFP. This will allow us to recalibrate in the event that initial meetings don't produce the desired results and will give large enterprises sufficient time to internally discuss investment.

The accelerated timeline will also safeguard the ultimate success of the project in the event of any unexpected delays or hurdles.

Customized Approach

Rather than approaching clients with a fixed “one size fits all” solution, we will present the program to each company in a manner that is customized to address their specific business needs and goals.

Invested in ABC's Success

Instead of assigning large teams or multiple industry experts to approach target companies as some firms may, we will execute the project with a single point of contact. ABC will benefit from this both because knowledge acquisition and insights will be first-hand (not passed through various channels) and because a single point of contact means absolute dedication to the success of this project and full accountability for the delivered results.