



How to Start a Regional Trade Community

The single most important element of success for an **ICPA Regional Trade Community (RTC)** is a committed leader for the group – you are here and reading this, now let us give you the tools you need to be successful! The following is a basic outline of the steps used to start an RTC group, but you can adjust this process to meet the needs of your location.

Steps to start a Regional Trade Community (RTC)

1. Contact ICPA (RTCgroup@icpains.org) to get a contact list of the ICPA members in your state. You will receive an Excel file that you can sort and filter.
2. From the list, narrow it down to just those in your local area. Use city names, zip codes, and look up any you do not know. If you are unsure about how far to go, keep it broad and let people opt-out if they would like.
3. Once you have your list, create a survey in Survey Monkey (for free) to get feedback on interest in the group and how the members would like the group to be run. Here is an example so you can get a feel for the kinds of questions to ask: <https://www.surveymonkey.com/r/6G5W838>. [Sample survey questions](#) are also listed at the end of this document.
4. Based on the feedback you receive, determine the basic concept of operations for your group
 - a. Frequency of meetings – monthly, quarterly, semi-annual (quarterly is recommended)
 - b. Location of meetings – one standard location vs. rotating
 - i. For cities in which members are very dispersed, rotating locations may help to bring in a variety of attendees to each meeting. Choosing one standard location is advantageous for reducing the work required to plan each meeting.
 - c. Timing of meetings – breakfast, lunch, happy hour (varies depending on your group)
 - d. Hosting – will you host or will you rotate hosting responsibilities? If you already have strong connections with other trade professionals in your area, you may consider seeking a co-leader who can help you.
 - e. Refreshments – will you provide food and drinks, or host somewhere people can buy their own? ICPA can assist with these expenses so please contact RTCgroup@icpains.org.
 - f. Guest speakers – what topics will you focus on? Consider topics that are currently in the news to increase interest in your meetings.
 - g. Will you offer an online option (web presentation and dial-in)? This is optional; it is popular in some groups but does require additional considerations for your meeting location such as internet access and conference phone availability.
5. Find a host, location, and speaker for your first meeting
 - a. You can use survey responses to focus on a particular topic or requested speaker. We recommend asking someone from CBP, BIS, or another government agency to speak at your first meeting. It will establish credibility for your group, and CBP is usually very willing to do outreach. A popular topic is their annual Trade Priorities.
 - b. Do consider your audience – do you have a stronger interest in exports vs. imports, for example? Your first meeting topic is an important choice to demonstrate to your members what to expect from your group.

- c. If you need help finding a speaker, you can reach out to RTCgroup@icpains.org and we or other RTC group leaders can assist.
6. Create a LinkedIn Group
 - a. This is optional but recommended. LinkedIn can be a great way to bring in new members to your group. You are starting with just the ICPA members, but ICPA membership is not a requirement to join an RTC group, so we recommend reaching out to local trade compliance and logistics people in your area on LinkedIn as well.
7. Send your first meeting invitation ([see sample](#))
 - a. Thank everyone for participating in the survey and tell them their feedback has shaped the first meeting and future meetings
 - b. Give them the location, timeline, speaker, and topic
 - c. If you are offering an online option, ask attendees to only accept the invitation if they are attending in person. This helps if you are providing food, so you know how many people for the order. In general, if you provide food, be conservative in your estimates for the number of attendees as not all attendees may choose to partake.
 - d. If you created a LinkedIn Group, include the link to the group and invite them to join the group.
8. Post your first meeting information on the LinkedIn Group
 - a. Make sure you tag the speaker if they are on LinkedIn by using @ and their name and link to their company website if they are a service provider.
9. A week before the meeting, send a reminder email and/or post a reminder to the LinkedIn Group.
10. Follow up with your speaker 1-2 weeks before the meeting to make sure they are prepared (slides ready, projector or screen if needed). If you want to provide handouts for your attendees, request the presentation and print the handouts. If your speaker is a service provider, make sure their presentation is educational with minimal sales pitch.
11. On the day of your meeting, be sure to arrive early at your location to ensure the room is set up and you are ready to greet the first arrivals. Bring business cards to hand out. This is your time to make an impression as the DATA group leader and to make connections. For any service providers you meet, encourage them to talk about the group with their other local clients.
12. Watch the clock so you start on time. When you start, thank everyone for coming and speak briefly about your vision for the group. Introduce your speaker and topic (you can have the speaker give you a short bio in advance or use their LinkedIn) and let them begin their presentation.
13. Take photos or ask a volunteer to take photos and send them to you.
14. Be prepared to ask questions of the speaker to stimulate conversation. Especially with a new group, people can be a bit shy at first.
15. Watch the clock so you end the presentation on time. Allow some additional conversation and networking time after the presentation ends.
16. Thank everyone for attending and ask them to send you any topic or speaker requests for the next meeting.
17. Send the presentation to the group the following day or sometime soon after the meeting (no more than a week).
18. Post about the meeting (with photos) to the LinkedIn Group.
19. Start planning the [next meeting](#)!

Sample Survey Questions:

1. Are you interested in being part of a [Location] networking group for global trade compliance and logistics professionals?
 - a. Yes
 - b. No
 - c. If you answered yes, please confirm the email address you would like to use for communications and invitations to meetings.
2. How frequently would you like to meet?
 - a. Monthly
 - b. Quarterly
 - c. Twice Annually
 - d. Annually
 - e. Other (please specify)
3. Which day of the week works best for you?
 - a. Monday
 - b. Tuesday
 - c. Wednesday
 - d. Thursday
 - e. Friday
 - f. Saturday
 - g. Sunday
4. What time of day would you like to meet?
 - a. Morning (7am - 10am)
 - b. Lunch (11am-1pm)
 - c. Happy Hour (5pm-7pm)
 - d. Other (please specify)
5. What is your preferred location for meetings?
 - a. [Location 1]
 - b. [Location 2]
 - c. [Location 3]
 - d. [Location 4]
 - e. Other (please specify)
6. Would you or your organization be willing to host a meeting?
 - a. Yes
 - b. No
 - c. If you answered yes, please provide your name or email to be listed as a potential host.
7. If a virtual option is offered for the meeting, would you join remotely?
 - a. Yes
 - b. No
 - c. Other (please specify)
8. What presentation topics interest you?
 - a. Export compliance - EAR, ITAR, ECCNs, etc.
 - b. Import compliance - ACE, PGAs, Focused Assessments
 - c. Global logistics - Incoterms, carriers, transportation costs
 - d. Supply chain security - CTPAT, PIP, AEO
 - e. Free Trade Agreements - NAFTA, KORUS, AUSFTA, etc.
 - f. Classifications - HS codes, Schedule B numbers
 - g. Other (please specify)

9. Do you have any suggestions for guest speakers? Please provide the name and email or phone number.
10. Would you be interested in serving as a co-leader for the group?
 - a. Yes
 - b. No
 - c. If you answered yes, please provide your name and email to be contacted by the group leader.

Sample Meeting Invitations

First Meeting

Please join us for the inaugural meeting of the Dallas-Fort Worth ICPA DATA Group! Thank you to everyone who responded to the survey as your feedback was extremely helpful for determining how we will meet. Most respondents preferred a happy hour, in the middle of the week, near Grapevine and we are delivering on your request!

Customs and Border Protection, Dallas, will be speaking on the CBP 2019 Priority Trade Initiatives – please bring your questions so this is an interactive discussion. We will meet at Farina’s Winery and Café in Grapevine:

Farina's Winery and Cafe
420 S Main St, Grapevine, TX 76051
www.farinaswinery.com
(817) 442-9095

We have the covered patio reserved from 6:00 – 8:00PM.

6:00-6:30PM	Arrival and networking
6:30-7:30PM	Presentation and questions
7:30-8:00PM	Networking

We have a brand-new LinkedIn Group so please check us out and join the group:
<https://www.linkedin.com/groups/12135339/>

I hope to see you there!

Following Meetings

Please join us for our next meeting of the Dallas-Fort Worth ICPA DATA Group! Thank you to everyone who joined us at the January meeting and special thanks to Adrienne Braumiller for an excellent discussion on Section 301.

For our next meeting, we are thrilled to have Michelle Schulz of Akerman LLP presenting “**Tech Update: What Trade Compliance Professionals Should Know about Export Controls on Software, Encryption, and Technology.**” Michelle has written multiple publications on export controls and is an established expert in international trade law. As always, please bring your questions to make this an interactive and engaging session.

We will meet at Spring Creek Barbeque in Grapevine:

Spring Creek Barbeque
315 State Highway 114W
Grapevine, Texas 76051-4084
<https://springcreekbarbeque.com/locations/>
(817) 416-6250

We have the banquet room reserved from 6:00 – 8:00PM.

6:00-6:30PM	Arrival and networking
6:30-7:30PM	Presentation and questions
7:30-8:00PM	Networking

If you are not in our LinkedIn Group yet, please check us out at
<https://www.linkedin.com/groups/12135339/>

I hope to see you there!