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# COUNTY OF ERIE

**MARK C. POLONCARZ**  
COUNTY EXECUTIVE

September 30, 2014

Erie County Legislature  
92 Franklin Street, 4<sup>th</sup> Floor  
Buffalo, New York 14202

**RE: Establishing a Canadian Office for Economic Development**

Dear Honorable Members:

Enclosed please find a memorandum and proposed resolution authorizing the contracting for services to establish a Canadian marketing and Economic Development office in cooperation with New York State.

Should your honorable body require any further information, I encourage you to contact Kenneth J. Swanekamp, Director of Business Assistance at the Department of Environment and Planning. Thank you for your consideration on this matter.

Sincerely,

Mark C. Poloncarz, Esq.  
Erie County Executive

A handwritten signature in blue ink, appearing to read "Richard Tobe", is written over a horizontal line.

By Richard Tobe  
Deputy County Executive

MCP/cw  
Enclosure

## MEMORANDUM

To: Honorable Members of the Erie County Legislature  
From: Department of Environment and Planning  
Re: **Establishing a Canadian Office for Economic Development**  
Date: September 30, 2014

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### **SUMMARY**

It is recommended that the Erie County Legislature authorize the County Executive to enter into contract with PSD Global, Inc., in an amount not to exceed \$100,000 for the purpose of obtaining services to market Erie County to Canadian firms and seek foreign investment in Erie County.

### **FISCAL IMPLICATIONS**

The 2014 Erie County Adopted Budget included \$100,000 for this effort.

### **REASONS FOR RECOMMENDATION**

Erie County is a border city with Canada and located within ninety minutes of the Greater Toronto Metro area which has a population over 5 million. If Erie County is to take advantage of this huge economic engine, it must position itself as one of the first places for investment by Canadian firms.

Empire State Development (ESD) has gone through an exhaustive solicitation process to select a firm to provide services for the New York State Canadian Trade and Investment program. Erie County's use of the same consulting and marketing firm will allow for economies of scale and a joint effort with New York State.

The Buffalo Niagara Enterprise (BNE) will also be partners and responsible for working with all leads generated by PSD Global, Inc.

### **BACKGROUND INFORMATION**

The County of Erie released a strategic economic development plan in June 2013 titled "Initiatives for a Smart Economy." One of the key components to this plan was the emphasis on increasing international trade. Two objectives to reach this goal were to open an Economic Development Office in the Greater Toronto and to Develop Cross Border Influence and Relationships. It is the desire of Erie County to contract with PSD Global for a twelve month period for the purpose of soliciting investment from Canada (primarily Ontario) into Erie County.

PSD Global is a market entry and economic development consulting firm that will provide Erie County with services to attract direct foreign investment.

## **CONSEQUENCES OF NEGATIVE ACTION**

If authorization is not granted, the County will not be able to work jointly with New York State and the Empire State Development office and obtain the economies of scale attainable by using the same firm for services.

## **STEPS FOLLOWING APPROVAL**

Upon approval of the resolution, an agreement with PSD Global, Inc. will be developed with a scope of work outlining what services and man hour allocations are to be provided.

**A RESOLUTION SUBMITTED BY:  
DEPARTMENT OF ENVIRONMENT AND PLANNING**

**RE: Establishing a Canadian Office for Economic Development**

WHEREAS, Erie County desires to capitalize on the County's proximity to the Canadian market and in particular the 5 million person Toronto Metro area, for the purposes of marketing Erie County as a location for investment; and

WHEREAS, New York State is also targeting the Canadian market and is opening a Canadian office and obtaining services for marketing in Canada; and

WHEREAS, New York State, through Empire State Development, has created and issued a Request for Proposals for services to market New York State in the Ontario region; and

WHEREAS, Empire State Development Corporation has received responses to its Request for Proposals, thoroughly vetted the proposals and selected a firm, PSD Global, Inc.; and

WHEREAS, Buffalo Niagara Enterprise has agreed to be a partner in this effort and work with all leads generated by this work of PSD Global, Inc.; and

WHEREAS, Erie County desires to combine its Canadian marketing and attraction efforts with New York State to obtain the greatest return for investment,

**NOW, THEREFORE, BE IT**

**RESOLVED**, that the County of Erie and the County Executive, is authorized to enter into agreements with PSD Global, Inc., the State of New York, Empire State Development, Buffalo Niagara Enterprise or other entities as appropriate, in amounts not to exceed \$100,000, to obtain services for Erie County to market to and attract investment of Canadian companies to Erie County; and be it further

**RESOLVED**, that this Resolution takes effect from and after its date of adoption.

**RESOLVED**, that certified copies of this resolution be sent to the County Executive's Office; the Director of the Division of Budget and Management; the Comptroller's Office; the Commissioner of the Department of Environment and Planning and the County Attorney.



# PSD Global Proposal to Erie County & the Buffalo Niagara Enterprise

September 30, 2014

**Submitted to:**

Erie County - Office of the County Executive  
95 Franklin St., 1600  
Buffalo, NY 14202  
Contact = Elizabeth A. Burakowski  
Phone: (716) 858-2924  
Fax: (716) 858-8411  
Email: Elizabeth.Burakowski@erie.gov

**Submitted from:**

PSD Global, Inc  
4031 University Drive, Suite 200  
Fairfax, VA 22030  
Ph: 1 (703) 531-8773  
Fax: 1 (703) 531-8777  
Contact: Patrick Dine, CEO  
Email: Dine@psdglobal.com  
Federal ID #: 800-10-4359

**PSD Global's offer is firm and irrevocable for a period of 60 days.**



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## A. Introduction

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PSD Global is pleased to present its proposal for a trade and investment campaign with special focus on FDI lead generation on behalf of Erie County and the Buffalo and Niagara Enterprise (BNE). We thank you for the opportunity and hope you find the enclosed information to be helpful.

This effort will position the Buffalo area to take advantage of investment opportunities and promoting trade between New York State and Canada. This new effort would dive a level deeper than the NYS project, identifying and encouraging Canadian investments in the Buffalo area specifically. Alongside PSD Global, this effort would be a collaboration between Erie County and the Buffalo Niagara Enterprise (BNE). PSD will dedicate additional staff, additional time and resources beyond the NYS project to this effort.

With PSD Global's hubs in Toronto and Quebec (as well as Alberta) and our comprehensive economic development experience and expertise, PSD Global can offer a truly complete solution. In Canada alone, our team has more than 40 years average experience and we have helped many agencies and companies. We offer an in-depth understanding of the complexities of lead generation to secure foreign investment. As a result, PSD Global has produced an impressive amount of successes in producing leads for organizations from more than 100 countries, including Canada, Germany,

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*The result? Unmatched expertise and continual focus on client service. Our work is innovative, well thought-through, and always focused on creating sustainable revenue-generating opportunities. The breadth and depth of the PSD Global network means we can offer customized solutions that are focused, precise, and actionable - and often mean the difference between a "fingers-crossed" decision and a thoroughly-informed one.*

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the UK, France, Brazil, and Italy.

Our proposal demonstrates our significant background as global economic development consultants, details our vast and relevant experience, and describes the exceptional experience and capabilities of the team that will be working on the BNE project. Our proposal also explains how PSD Global will set the Buffalo area up for success with a proven plan of action and then implement this plan. It describes the robust, proprietary lead generation methodology and the sector-expert networks that we will use to develop a list of relevant, appropriate, and genuinely interested leads for trade and investment opportunities for Buffalo. It also describes how we will support Buffalo-based companies at trade shows and other industry events as needed. At every stage in the process, PSD Global will work closely with the BNE and Erie County leadership to ensure the client's satisfaction.

We greatly appreciate your consideration in leading the trade and investment program for Erie County and the BNE, and hope you find the enclosed proposal to be a compelling solution. Please do not hesitate to contact me directly should you have questions or would like to discuss.

Sincerely

Patrick Dine

PSD Global – President & CEO



## B. About PSD Global

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PSD Global is a market entry and economic development consulting firm that provides its clients comprehensive and innovative advisory services on attracting foreign investment and encouraging trade, including strategic planning and market analysis, business development, sales and marketing implementation, and business match-making support. We provide customized solutions that are specifically designed to match our client's critical business market entry and investment challenges. PSD Global is also one of the oldest North American lead generation firm with more than 20 years of experience.

Our core services are structured in two complimentary business units: a corporate unit focused on exports of mid-market firms and a government business unit focused on building measurable lead generation/investment attraction programs for economic development agencies. The two business units complement each other and PSD Global is the only firm providing both business and economic development solutions. Clients have included many regional and national governments, i.e. JETRO (Japan), Invest in Austria, Ontario Ministry of Economic Development, Commonwealth of Virginia, and leading companies such as Siemens, BP Solar, Deutsche Bank and Cisco. PSD Global also has exclusive partnerships with leading firms such as Deloitte and AECOM as well as organizations including the Mason Enterprise Center.

Headquartered in Washington, D.C., PSD Global is supported by associate offices in Miami, New York, Toronto, Munich, London, Mexico City and Sao Paulo. Each office provides coverage in strategic business regions and enables us to offer complete in-market representation services, while at the same time maintaining the personal touch upon which our clients rely. Our partner firms are fully staffed with expert associates, able to provide sector- and industry-specific contacts and valuable in-country expertise.

**Unmatched Expertise:** Whether you're an IT company in Nice, an economic development agency in New York or a global aid agency in Nairobi, PSD Global has the resources and expertise you need to expand across borders. From international import/export and new market entry plans to global aid programmes and risk assessment initiatives, the PSD Global team offers more than a combined four decades of international management consulting experience. PSD Global's business model provides an excellent platform through which we regularly draw on our extensive network of strategic partnerships to rapidly augment our team with professionals who have the complementary talents and expertise required



to meet the unique needs of our clients. With local expertise across more than 150 markets, PSD Global is the international management consulting firm that can take care of all your global expansion needs.

**Services:** PSD Global brings together the private and public sectors by leveraging our global experience across organizations - and across the world. To help our clients achieve high-quality and cost-effective results internationally, we apply our trusted expertise across our three main services:

1. **Economic Development: Helping economic development agencies attract foreign investment and trade**

Economic development agencies need to effectively promote their regions to the right executives in order to attract international investment and promote trade. Our Economic Development Division experts work closely with these agencies and supply expertise to generate qualified leads - in order to match each agency with the right investors. From focused call centre operations to global branding campaigns and organized trade missions, we leverage our contacts and strategic relationships across all our divisions in order to maximize each agency's international investment potential.

2. **Global Development: Helping public sector groups maximize aid and global development programmes**

Global aid and development programmes need to maximize effectiveness in order to truly serve their local communities. Our Global Development Division provides training, consulting services, technical expertise and direct assistance to both public and private sector groups as well as Non-Governmental Organizations (NGOs) in order to achieve global aid initiatives. By leveraging local companies and talent as well as our expertise and contacts across all PSD Global divisions, we're able to maximize aid to local communities.

3. **Global Risk: Helping governments assess economic, political and security risks**

Corporations and governments alike require information and intelligence in order to assess business, political and security risks. Whether entering new markets, evaluating new business partners or considering new acquisitions, our Global Risk Division has the expertise and network of intelligence and foreign service contacts necessary to effectively assess risk - and provide the information needed to make accurate decisions.



## C. PSD Global's Qualifications

### 1. Overview of the Organization's Experience

PSD Global is one of the world's leading market entry and economic development consulting firms. PSD Global has offices across the U.S., a subsidiary in Europe, and offices in Brazil, Canada, the UK, and Germany. In 2011 alone, the company conducted successful projects on 4 continents and worked with agencies and companies from more than 30 countries. PSD Global and ONLY PSD GLOBAL has a record of 10+ years of 50% FDI and 50% trade experience. Our competitors do not.

PSD Global delivers a full suite of comprehensive and innovative services to our clients, including strategic planning, market analysis, lead generation, business development, trade show and business matchmaking, trade mission/visitor management, event management, and full in-market representation.

Our engagements have focused on markets in North America, Europe, and Latin America. PSD Global is headquartered in Washington, D.C. and maintains associate offices in Miami, New York, Toronto, Munich, Seattle, Buenos Aires, and Sao Paulo. Our partner firms are fully staffed with expert associates, able to provide sector- and industry-specific contacts and valuable in-country expertise.



Figure 1: PSD Global Activity Throughout the World (in green)

Since our founding in 1999, PSD Global has delivered solutions to various sectors, focusing on renewable energy, life sciences, advanced manufacturing, BPO, and logistics/distribution, with a particular focus on the ICT, automotive, real estate and tourism, aerospace, and food and beverage sectors. Most of the company's economic development projects also focus on R&D investments in various sectors.

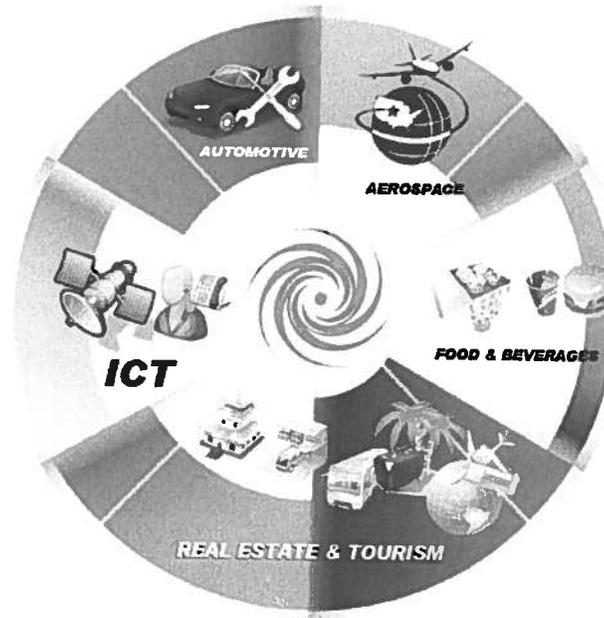


Figure 2: Sectors & Industries Served

PSD Global's clients have included regional and national governments as well as leading private sector companies. PSD Global has worked with **more than 100 Economic Development** agencies globally, including the governments of Austria, Bavaria (Germany), Brazil, Virginia (US), Mexico, Bogota (Colombia), Japan, Ontario (Canada), Singapore, and Korea, to name a few. PSD Global is one of the world's leading firms working with EDA's on their investment attraction and trade promotion activities. The company also has extensive experience working with clients on their market entry needs. We have worked with approximately **150 companies on market-entry projects**, including Deutsche Bank, Cisco, Akamai, and Siemens. These projects resulted in average revenue growth of 200% annually and multiple export awards.

PSD Global offers a unique combination of extensive industry expertise and decades of proven international experience. Our distinctive skill sets and driven business culture provide our clients with the knowledge that our work will be completed above and beyond expectations.

## 2. PSD Global Case Study Examples

PSD Global takes great pride in its strict client confidentiality and discretion standards. However, we have created a shortlist of PSD Global clients (clients to whom direct reference is possible and whose waivers



permit). Although by no means comprehensive, the list demonstrates some of the clients we have worked with and projects we have undertaken.

Investment Attraction	
Client	Project Summary
<b>Virginia Beach, VA</b>	Full fledged European market representation and lead generation efforts. Multi year project resulting in many investment leads and projects
<b>State of Virginia</b>	Hired by the State of Virginia's European office (VEDP) to identify, pre-qualify, and set appointments with German companies in the Berlin region considering expanding in the US market. Also conducted a similar programme in Israel.
<b>Invest in Northern Ireland</b>	Hired by US office of INI to conduct an appointment setting campaign in Washington DC and Atlanta regions for INI team. Approach is to leverage our industry network in ICT and telecom space and identify companies willing to consider Northern Ireland as an offshore ICT development destination.
<b>Invest in Slovenia</b>	Lead Generation project in Germany and UK.
<b>Portuguese Government</b>	Multi-year campaign for US and Canada for Trade & Investment
<b>Atlantic Canada Opportunities Agency (ACOA)</b>	Won competitive bid to deliver a series of appointments for the ACOA delegation to the 2010 Retch Clean Energy Technology show. Deliverables included identifying and prequalifying potential FDI investors to the province of Nova Scotia. Additional such projects at future Retch events as well as Photonics West.
<b>City of Morganton, North Carolina</b>	Conducted international marketing & lead generation campaign for Morganton, North Carolina. Project calls for awareness-building and recruitment of international companies to invest in this former manufacturing & textile base.
<b>USAID and EU</b>	Together with Deloitte, investment attraction strategies for developing countries focused on key sectors.
<b>Invest in Austria</b>	Lead generation services focused on identifying, pre-qualifying, & delivering meetings with US companies in Biotech sector who are considering opening R&D center in Europe. Included 1-on-1 meetings at trade shows, seminars, etc.
<b>JETRO (Japan)</b>	Lead generation campaign, 1-on-1 meetings, and other assistance for Japanese government focused on renewable energy, datacenters, and major multi-nationals.
<b>Invest in Bogota, Colombia</b>	PSD Global completed a project to identify and pre-qualify potential BPO (Business Process Outsourcing) investment from the US to Bogota, Colombia.
<b>Eastern Cape of South Africa</b>	Developed BPO strategy and implemented lead-generation campaign ahead of roadshow focused on US West Coast.
<b>Province of Ontario, Canada</b>	Served as in-market business development consultant on US East Coast for Province of Ontario, providing variety of investment attraction services including corporate calls, lead generation, awareness seminars, representation at trade shows, and on-going representation for foreign investment attraction in ICT, BPO, and Clean Tech sectors.
<b>Federal Government of Canada</b>	Multiple roadshow and lead-generation campaigns in Aerospace, BPO, and Clean Tech. Produced avg 50+ one-on-one meetings on each trip. Also scheduled and managed logistics of key seminars with key ministers and ambassador included.
<b>Government of Poland</b>	Lead generation at various trade shows.



Trade Promotion/Business Match-Making	
Client	Brief Project Summary
<b>Government of Brazil</b>	Arranged seminars, one-on-one meetings, and roadshow for Brazilian government. Helped with strategic positioning and multiplier outreach. Hired more than once to conduct roadshow and seminars.
<b>Team Canada Atlantic Trade Missions</b>	PSD Global leveraged its Washington DC network of ICT contacts and conducted a matchmaking campaign for Atlantic Canada technology firms seeking US partners and prospective end-user customers.
<b>Government of Quebec</b>	Hired by the Quebec government office in Washington DC to organize a series of face-to-face meetings for a group of Quebec-based companies visiting the Washington DC region. Their objective was to meet with potential customers, resellers, and government contractors in the Homeland Security sector.
<b>Embassy of Canada</b>	Won a competitive bid issued by the Canadian Embassy in Washington DC to deliver a business matchmaking project for a delegation of Canadian companies participating in the "Partners in Security" trade mission and conference.
<b>IE Singapore</b>	Hired by Government of Singapore's Trade & Investment office in NYC to pre-qualify and deliver a series of meetings for a group of Singaporean companies attending the CTIA mobile telecommunications trade show in Las Vegas.
<b>Mexican Government – Tech BA</b>	Worked with the Mexican government on the trade side to help 40+ Mexican technology and renewable-energy firms market into the US. Handled trade-show participation and one-on-one meetings.
<b>German Trade and Investment (Invest in Germany)</b>	Created and managed 2 annual "Doing Business in Germany" investment attraction conferences sponsored by leading firms such as Siemens and DB and w/ former chair of Deutsche Bank as speaker. Included EDAs from across Germany and drew many speakers and hundreds of highly qualified investors as attendees.

### 3. Narratives of Past Projects & Successful Results

The following case studies demonstrate PSD Global's breadth of experience and our suitability for this assignment. If required, we can provide more information on these case studies at the interview stage.

#### ***Ministry of Economic Development & Innovation, Ontario, Canada***

This was a multi-year engagement to represent Ontario in North America and identify leads, develop projects, promote Ontario as a speaker, and organize seminars, among other tasks. This project focused on key sectors of ICT, renewable energy, and BPO services. It produced 144 qualified contacts and 20 leads per year. Measurements also included actual investment projects. The project lasted 3 years.



### ***AICEP, Government of Portugal***

PSD Global won a competitive bid against all leading lead generation companies to be the exclusive lead generation firm in North America, including arranging road shows with the Foreign Minister. This project focused on a variety of key sectors. PSD Global was also chosen again for a second year.

### ***Virginia Beach, VA***

PSD Global has been representing Virginia Beach in Europe and opened an actual German office for this client. This project quickly produced leads from 5 countries, multiple trips to trade shows and qualified meetings and has increased the investment pipeline by 70%!

## 4. References

*Also include three references able to substantiate that your organization meets those requirements.*

Clare Barnett  
Province of Ontario  
Clare.Barnett@ontario.ca

Rui Boavista Marques  
Portuguese Trade Commissioner  
rui.boavista.marques@portugalglobal.pt

Kristin Gabor  
IMG Saxony Anhalt, Germany  
kristin.gabor@img-sachsen-anhalt.de

## 5. Biographies of Proposed Core Team

We are proposing a core project team comprised of a Project Manager (PSD Global, CEO), a Senior Consultant in Ontario (Jay Amer), a Senior Consultant in Quebec (Christian Perreault), and a Canadian Support Lead (Gillian Hatton). The efforts of our 4 core team members will be bolstered by the expertise of Chris Vossel, who is Canadian and used to head up German trade effort in western Canada. This is an incredibly high-level team that will be able to deliver all the services required. They will have full support of well-equipped offices, a large and professional office support staff, a CRM system and CRM management, secure servers, and more.

### **Patrick Dine, CEO—Project Manager**

Patrick Dine, Founder and President of PSD Global as well as Managing Director of PSD Global Europe. Over the last 15 years, Patrick has grown the company internationally, and has subsequently worked with FDI agencies in over 40 countries (including the Federal Government of Canada and ACOA of Atlantic Canada), as well as engaging working with over 150 companies on market entry projects. Patrick will lead the project as Project Manager and dedicate significant time and effort to the project's success.

Patrick has received multiple awards for excellence in exporting and has delivered over 200 percent annual revenue growth for each of his corporate clients. He is also seen as an expert on Foreign Direct Investment Attraction and will shortly be publishing a book on the topic. He is fluent in five languages, including German, Spanish, and French. He has spent significant time in the IDM and related target markets.



Patrick also represents PSD Global and its clients in various networking associations and industry-specific groups across the world. His leadership roles include membership on the CTIA's wireless leadership council, co-chairing the Canadian Wireless Association's mobile content committee and the international committee of the French Chamber of Commerce. Furthermore, he serves as an adjunct professor of business management at various local universities and conducts global management seminars.

Before starting PSD Global, Patrick built up and led the global business development activities of the wireless software firm mPortal. His other professional experience includes heading all international operations and business development for network management company Edge Technologies. At Edge, he successfully established the company's presence in over 30 countries and formed alliances with some of the world's leading companies like France Telecom, Vodafone, Banco do Brazil, and Dimension Data of South Africa. Past assignments include work for the United Nations, Siemens, Shell, and Deutsche Bank, among others.

He frequently speaks to executives on topics related to international business and has served as an advisor on international affairs for US presidential campaigns.

#### **Jay Amer, Senior Consultant, Ontario Hub**

Jay Amer leads all of PSD Global's Canadian economic development efforts and is President of his own Canadian firm, Amer & Associates Economic Development—a successful, full-service economic development consultancy. Amer is a certified professional economic development practitioner. He is PSD Global's Senior Canadian Associate and will head up the Ontario hub for this project.

Jay Amer is President of Amer & Associates Economic Development a full service professional consultancy he established in January 2010. As a Certified Economic Development professional, he was previously responsible for delivery of a wide variety of economic development services including investment attraction, business development, marketing and communications for the regional economic development corporation in Peterborough, Ontario. He works closely with a broad network of regional, provincial, and federal economic development, government, and business partners to ensure his clients achieve success.

Amer & Associates portfolio of work includes development of economic development and marketing plans, economic research and analysis for investment attraction and assistance with branding, communications, government relations, and funding programs. Jay recently contributed to a major provincial government initiative on developing performance measurement tools for economic development.

An active member of the Ontario East Economic Development Commission Jay has chaired their Advanced Manufacturing Investment Program, bringing diverse rural and urban communities together in a collaborative marketing effort to support investment attraction initiatives in sectors that include life sciences, food, advanced manufacturing, aerospace, nuclear and green technologies. Amer & Associates is currently providing executive management services to this regional marketing organization.

Prior to joining the economic development profession Jay had a successful career in public affairs and communications with Ontario's provincial electrical energy utility. He was a founding member of the DNA



Cluster (now the Innovation Cluster) in Peterborough—a partnership between post-secondary institutions and the private sector tasked with supporting growth of a knowledge-based economy focused on life sciences. He is a past president of the Economic Developers Association of Canada (EDAC), Canada's national professional economic developers association.

Volunteer involvement in his hometown of Peterborough includes service as Campaign Co-Chair for the Fleming College Skilled Trades & Technology Centre and 1st Vice-President on the Board of Directors of Camp Kawartha & the Kawartha Outdoor Education Centre. Jay is also a past Director with the Rotary Club of Peterborough and is Chair of the Program Committee. Jay is a past recipient of Bell Canada Ontario East Economic Developer of the Year Award.

### **Christian Perreault, Senior Consultant, Quebec Hub**

Christian Perreault is Senior Partner, Strategic Positioning and Economic Development, at Explore Solutions Economic Development Services. Christian holds a Bachelor's degree of Science and a Master's degree in International Management from University of Quebec in Montreal. Christian has been involved in economic development for over eighteen years. He will take the lead of the Quebec hub for this project

He joined Explorer Solutions in 2006 as Managing Director North-America and became co-owner and Senior Partner in 2008. Prior to joining Explorer Solutions, Christian held senior management positions in economic development as Vice-President – International Business Development for Longueuil Economic Development, CEO Haut-Richelieu Economic Council and CEO Wellington Commercial Development Corporation.

He is the driving force behind many aerospace-related projects such as the Aerospace Technology Road Map, the Canadian GNSS Institute project, the Longueuil Aerospace Cluster and is actively involved on the North-American aerospace scene. Christian has more recently lead the development of many aerospace clusters such as the Upper Michigan Green Aviation Coalition, the Unmanned Aerial System Center of Excellence (Alma Airport, QC), and the Green Military Aircraft and Vehicle Training, Development and Research Center.

He's an active member of the Aerospace Industries Association of Canada, of the Canadian Association of Defense and Security Industries, the Canadian Business Aviation Association, the Quebec Aerospace Association and many airport associations.

### **Gillian Hatton, Canadian Support Lead**

Gillian Hatton is a specialist in location research, strategy, marketing, and business development. She has over 15 years of experience in regional, national, and international investment attraction and economic development with economic development agencies in North America, the United Kingdom, and overseas. Her firm Location Strategies Limited was started in 2004, and its specialties include the development of sector strategies to facilitate investment attraction activities. Gillian will have a substantial role in this project researching and developing the sector analyses and strategies.



Gillian holds a BSc. (Hons.) Management Sciences from the University of Manchester, Institute of Science and Technology, United Kingdom and a postgraduate certificate in Internet Business and Technology from the University of Toronto. She has developed a significant number of industry sector strategies and cluster profiles on behalf of municipal, regional, and provincial clients. Her experience includes detailed and strategic sector studies encompassing the value chain, location assets, supply chain gaps, technology opportunities, and key sector strengths. Facilitating the targeting of specific industry sectors, geographic areas and companies, this work has underpinned the creation of specific sector value propositions and the leveraging of disruptive and emerging technologies.

Since 2008, Gillian has undertaken a comprehensive range of sectors for Ontario East Economic Development Commission (OEEDC):

- Eastern Ontario Sectors Opportunity Assessment, 2014
- Eastern Ontario Data Analysis for OEEDC Strategic Plan, 2014
- Food Processing in Eastern Ontario, 2012
- Bio-Health sector study, 2012
- Sector profiles and updates: cleantech, aerospace, nuclear, 2008-2010

She has also developed sector studies for major municipalities that have covered a diverse range of sectors such as ICT, cleantech, advanced manufacturing/engineering, life sciences, supply chain logistics, food processing, professional services, aerospace, nuclear energy, and natural resources.

Gillian has worked extensively on sector-based investment attraction strategies, and has a successful track record in developing and implementing international business, retention, attraction and expansion strategies, for economic development agencies in North America, the United Kingdom and overseas. This includes Ontario East Economic Development Commission, Quinte Economic Development Commission, Niagara Economic Development, The North of England Inward Investment Agency, and The Welsh Government.

### **Michael Vossel, Sector and Lead Generation Expert**

Michael Vossel oversees PSD Global's activities in Central and Southern Europe and is based in Germany. As a former representative of German industry in Canada Michael will bring an additional level of Designated Area familiarity and knowhow to the project. A German and Canadian citizen, Michael holds a degree in Economics from the University of Cologne and is fluent in multiple languages, including German and English and has rudimentary French abilities.

Prior to joining PSD Global, Michael served as CFO of Telogic Germany GmbH, a Danish and German owned mobile virtual network operator and enabler. Before joining Telogic Germany GmbH in April 2007, he served as Senior Vice President Sales & Marketing of Materna GmbH and oversaw all of the company's international activities. In addition he served as CEO of its US subsidiary. He was also a member of the board of the company's investments in Eastern Europe in the Czech Republic and Poland and Managing Director of the company's subsidiaries in Austria, Belgium, Hungary, Italy, Netherlands, Switzerland, Singapore, and Thailand. He personally oversaw the growth and expansion of the company's presence in each

of these markets. He is a frequent speaker at industry events and a recognized expert in managing global partnerships.

Previously, Michael served on the board of mobilSafe AG—a company focused on providing internet-based services for traveling executives—which he founded in 1999. At mobilSafe, he oversaw all of the company's financial, accounting, controlling, and personnel activities. In 2001, Michael helped sell the company to one of its original investors, Telegate AG, Europe's leading directory and information services firm.

Prior to founding mobilSafe, Michael was Managing Director of Mauk & Randelhoff Ltd., a provider of financial and investment analysis software. As Managing Director, he not only oversaw the successful deployment of a Commodity Futures software package but also launched a global investment fund. Other previous positions include serving as the German Industry's Delegate to Western Canada and Managing Director of the Canadian German Chamber of Industry and Commerce in Edmonton, Alberta, and Vancouver, British Columbia, Canada. Furthermore, he has served on the boards of a variety of other electronic and technology firms.

## 6. Clear Passion & Enthusiasm for New York

PSD Global has led economic development projects with countless companies in New York State and firm leadership passionately supports attracting trade and business to the state.

Patrick has lived in New York and attended high school there. He and PSD Global have worked with many NYS-based clients and in particular as it pertains to NY/Canadian efforts. From trade missions to corporate clients PSD Global is not only very familiar with the state but also very involved.

Jay Amer is based in Ontario East where there are three border crossings to NY State. He has an ongoing contact with NY Economic Development professionals through EDAC, IEDC, and he works with Canadian Trade Commissioners based in Buffalo and New York City.

Christian has closely followed the trade corridor initiative and traveled to investment attraction events in Albany, Plattsburg, and New-York City. He has strong knowledge of the state economy, geography, and some of its business sectors. He also understands the political will and strength of the State of New York.



## D. Plan of Action

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The sections below detail how PSD Global will promote the attraction of International Investment (inward investment or foreign direct investment-FDI) to Erie County from Canada.

Throughout the study, we propose a **weekly conference call** between Erie County and BNE leadership and the PSD Global team, to collaborate and discuss the study's progress. We would like to propose Thursdays at 1pm EST, but can work around the County's schedule as needed. To ensure full coordination, the State of NY (ESD) executives will also be invited to this weekly call. PSD will also ensure the County / BNE are fully aware of its NYS efforts and activities.

We would also like the PSD Global team to conduct **in-person visits to Erie County on a quarterly basis** for further collaboration and thought partnership. Visits will be at the cost of PSD Global and normally be led by PSD's Canada Head.

We will also be in close coordination with New York State throughout the project. PSD Global will take the following steps to ensure constant coordination between parties:

- PSD Global will brief NYS on the study's progress, especially the Buffalo area office, on a weekly basis and in comprehensive monthly reports
- As mentioned above, PSD will invite NYS to take part in the weekly conference calls
- PSD will brief Erie County on any activities that are related to its NYS project that may be of relevance to the county
- PSD Global leadership and Canadian leadership will be linked to the county benefits from the NYS efforts
- Please note: A single lead can be submitted to NYS and Erie County but can **ONLY** be counted once. Erie County and NYS will develop a methodology to determine on whose behalf a lead has been generated. PSD Global will ensure full transparency and will keep all parties informed, but in case of any doubt, Erie County will have the final word on whether a lead is counted toward the project goal. The BNE will following up on the leads and will have a MOU in place with the County. PSD will also assist with any follow-up needed.

### 1. Investment Attraction Efforts

PSD Global will perform the following investment attraction services:

- Actively identify, qualify, and provide leads/projects for the attraction of international investment to the County/ Buffalo Area.



- Under the direction of the department, design and execute a direct marketing campaign to targeted businesses outside of Erie County and in the targeted market. This direct marketing campaign will be coordinated with the County and BNE and approved, as to ensure no conflict with existing branding and marketing efforts.
- Identify firms and for qualify investment leads and projects for inward investment attraction, as well as provide operational support for the department in industry-related investment attraction activities and promotions (focus to be on the Buffalo area's key industry clusters and technologies—industries and industry priorities provided after the contract is awarded)

To provide all investment attractions services required, PSD Global will utilize our Lead Generation Methodology and conduct tradeshow, marketing, and support activities. The following details our approach to each.

Our leads will have the support of offices in both hubs as well as engaged support from PSD Global offices in Washington D.C., Fairfax, Virginia, and Dusseldorf, Germany whose staff have worked on both trade and investment projects in over 100 countries. Project administration and all project needs will be supported by a full professional office staff, a cutting-edge CRM system and CRM management, and secure servers for confidentiality.

#### a. Lead Generation Methodology

In order to identify solid leads, we will enlist our **proprietary lead generation methodology**. We believe in dynamic leads versus static leads, meaning that our methodology focuses on moving leads to investment and trade partnerships rather than simply identifying them and handing them over to our client.

PSD Global staff will monitor and report on all leads frequently and work closely with BNE and Erie County leadership to ensure successful outcomes for our project.

PSD Global has considerable experience in developing qualified leads for our clients—it is one of the company's core activities, and we have developed a highly successful methodology for achieving qualified results in projects in South America, Europe, the US, and Canada.

Because we have **hubs in both Quebec and Ontario** and **Lead Support based in Ontario** we have thoroughgoing knowledge of local business practices, distribution services, and sales channels.

**A key differentiator** between PSD Global's and our competitor's approaches to Lead Generation is the high-quality experience of our project teams. We staff all of our projects with **senior sector specialists** that have an average of **25 years of relevant sector experience**. And they are supported by multi-lingual teams with solid records of success in the target markets. Because our sector experts work in their respective fields on a daily basis, they maintain active senior-level executive contacts and excellent industry networks. That means they **do not have to rely on databases or cold calling**. Rather, most of our calls are to existing contacts or via introductions. This means that the **response rate percentage is impressively high**.

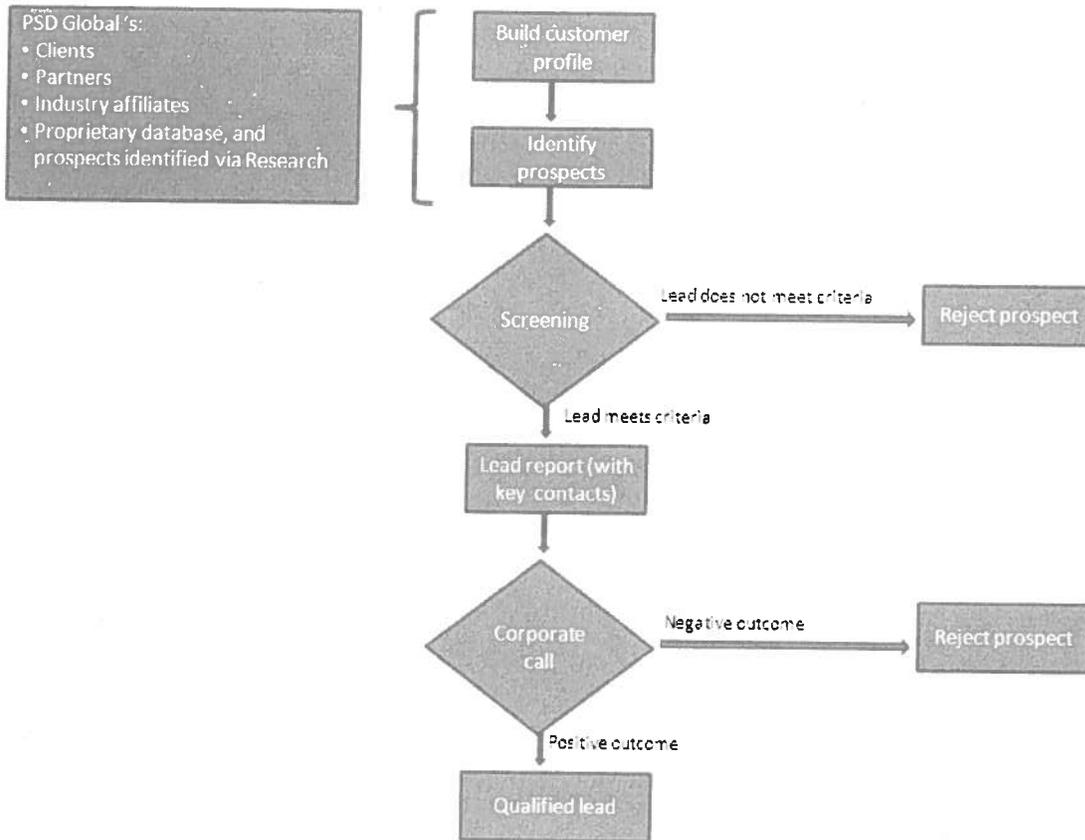


Figure 3: Lead Generation Methodology

Our campaign to identify potential investors will be powered by our simple but effective **proprietary Lead Generation Methodology**: 1. Build Customer Profile & Identify Prospects; 2. Screening; 3. Corporate Calling.

### 1. Build Customer Profile & Identify Prospects

To develop and identify a list of qualified potential investors and trade partners for NYS, PSD Global will both implement our proprietary Lead Generation Methodology, leverage our **existing C-level relationships** within target industries and the **insights and connections of our Senior Consultants in Quebec and Ontario**.

PSD Global tracks several **key 'triggers'** to identify potential leads. These include:

- Growth rates
- New senior management appointments
- Raising of finances
- Introduction of innovative products or systems
- Acquisitions



- Closure of facilities
- International expansion
- Acquisition of new customers/partners in Europe
- Partnerships with Science & Technology parks and/or academic research institutions
- Venture-capital funding

## 2. Screening

From the bucket of identified prospects, PSD Global screens companies for the corporate-calling phase, based on the BNE's selection criteria and minimum requirements and variables identified by PSD Global as crucial for the BNE and county's aims. We screen the potential investors/trade partners for all the key criteria and will only include a lead on the shortlist if it is positive for all key triggers. We will communicate regularly with the BNE's managers/directors to ensure that our goals stay aligned and that we are on target with the companies we are identifying.

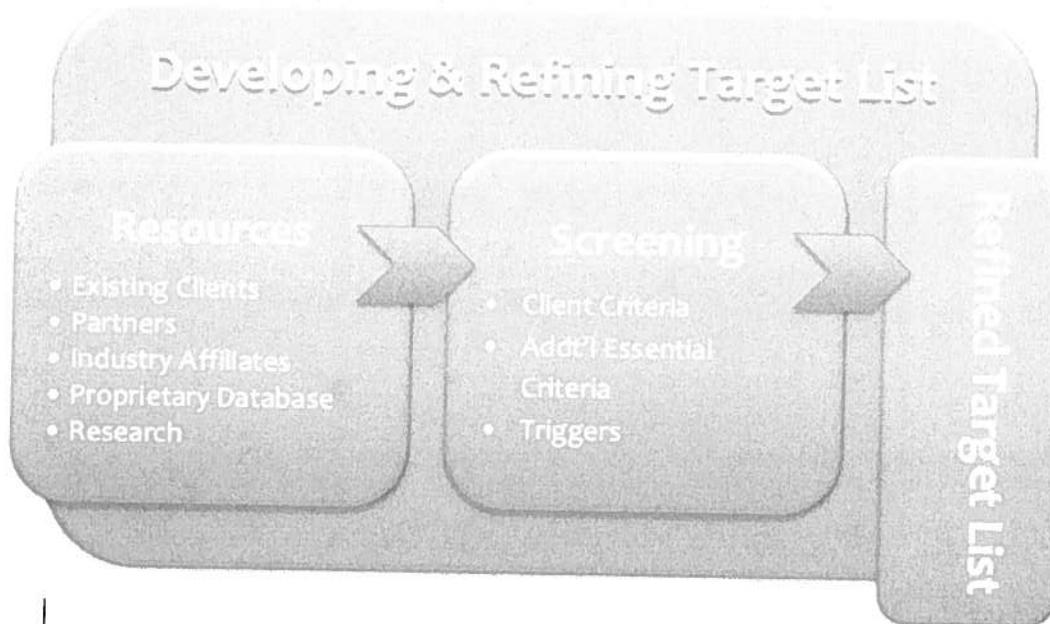


Figure 4: Target List Refinement

## 3. Corporate Calling

Having reviewed the triggers and created a short list of potential partners, PSD Global then contacts the key decision-makers of each identified company to validate and qualify possible leads for the BNE. Such leads will be C-level executives with decision-making responsibility and authority (rather than Corporate Communications or Investor Relations executives).

PSD Global recognizes that FDI site selection decisions are handled at the executive, C-level within companies; therefore, we always identify and speak to individuals with real decision-making responsibility. **Importantly, our corporate calls are made by PSD Global's sector experts, not junior calling staff.** That ensures a much higher response and meeting invitation acceptance rate. Our **Senior Consultants based in the Quebec and Ontario hubs** will be crucial to this process.

In large companies, calls might be directed to Vice President of Business Development, Director of International Affairs, Head of Global Strategy, Vice President of Marketing, European President/Managing Director, Property or Real Estate Director, and/or Director of Site Selection Division. In smaller companies, PSD Global will target the following personnel: CEO/Managing Director, Chief Financial Officer, Chief Operating Officer.

### Profile Development

For each identified lead, PSD Global will develop a profile that provides the following information:

- Company name
- Parent company name
- Sector
- Number of company employees
- Company address
- % of Sales in the USA currently
- Worldwide HQ address of company, including local address:
  - City/State/province/county/Zip/postal code (in full)
  - Main switchboard number/Main fax number
  - Website address
  - Ticker symbol (if designated)
- Details about senior executives
- Details about company senior decision-makers linked to the investment/trade partnership plans.

Where relevant, at least one of the contacts should be a decision-maker located directly responsible for international business. Details provided for each contact include the following:

- Surname/First name(s)/Title/Position (e.g. CEO)
- Telephone number/Fax number
- Email address
- Decision-maker rating: high/medium

### Identified-Lead Reports

After each discussion with a decision-maker from a qualified company, PSD Global will create and provide the BNE with a detailed report of discussion "minutes."

Reports will cover the following areas (as relevant):



- Identification of potential investor / trade partner (including the contact person).
- Company plans and an outline of the investment /trade project.
- Clear expression of interest to include the Buffalo area among possible locations for the company's forthcoming investment projects.
- Company's business activity and industry classification.
- Problem or opportunity that will be solved by relationship.
- Investment project value–CAPEX (if known). This will also detail if funds are actually available.
- Number of jobs.
- Investment/ Trade Partnership Timing (Less than 6 months, Less than 12 months, etc.)
- Project type (M&A, Research & Development, Logistics & Distribution, Marketing, etc.).
- Financials:
  - Accounting period
  - Sales revenue
  - Sales revenue growth (%)
  - Net income
  - Net income growth (%)
- Detailed investment / trade partnership project analysis.
- Regions that may compete with Erie County, and why.
- Solid reason to speak with this lead.
- Number of jobs that would be created.
- Has expressed a specific interest in speaking with Buffalo area representatives.
- Wants to develop a new physical presence outside of their home market or grow an existing investment in the Buffalo area.
- Wants to develop a trade partnership with Buffalo area-based companies.
- Is interested in setting up in the Buffalo area/Erie County in a 1-3 year period or, if already in the US, interested in expanding or relocating to the Buffalo area.
- What stage the investor / trade partner is in the process of making decision.
- Can the Buffalo area add value in any of the following areas:
  - Business case and set-up
  - Property
  - People
  - Networks

### **Lead Management & Tracking**

To track, nurture, and manage all leads PSD Global will use a sophisticated and effective marketing automation system. The following are screenshots of the marketing automation system PSD Global will use.

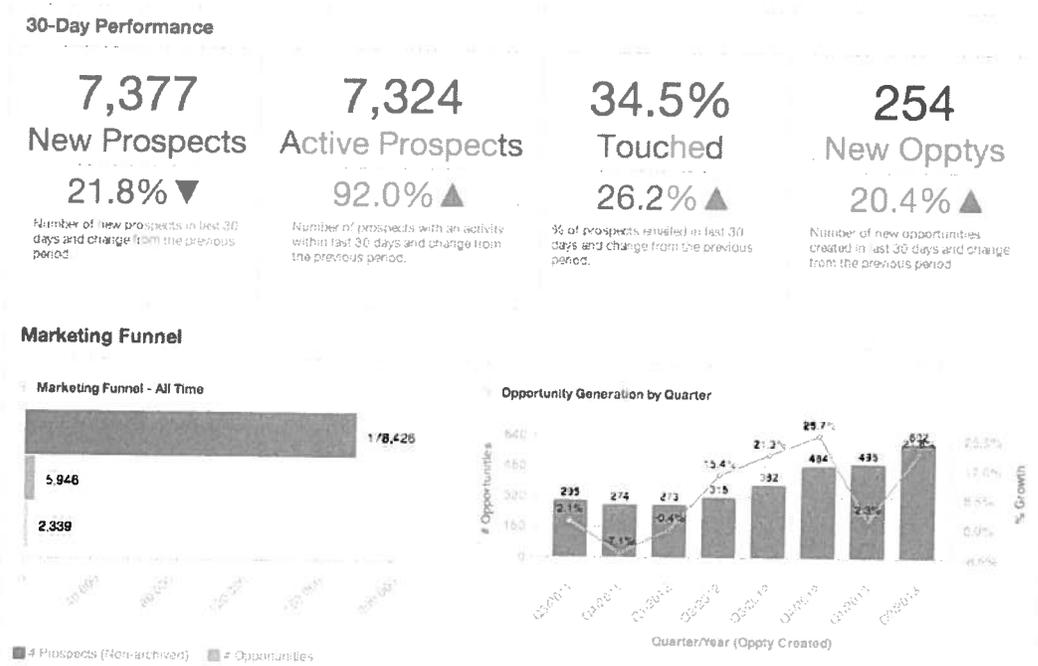


Figure 5: Report (30-Day Performance, Marketing Funnel)

## Prospects for Lifecycle Stage

Date Range: Last 30 Days      Comparing May 23, 2013 - Jun 21, 2013 to Apr 23, 2013 - May 23, 2013

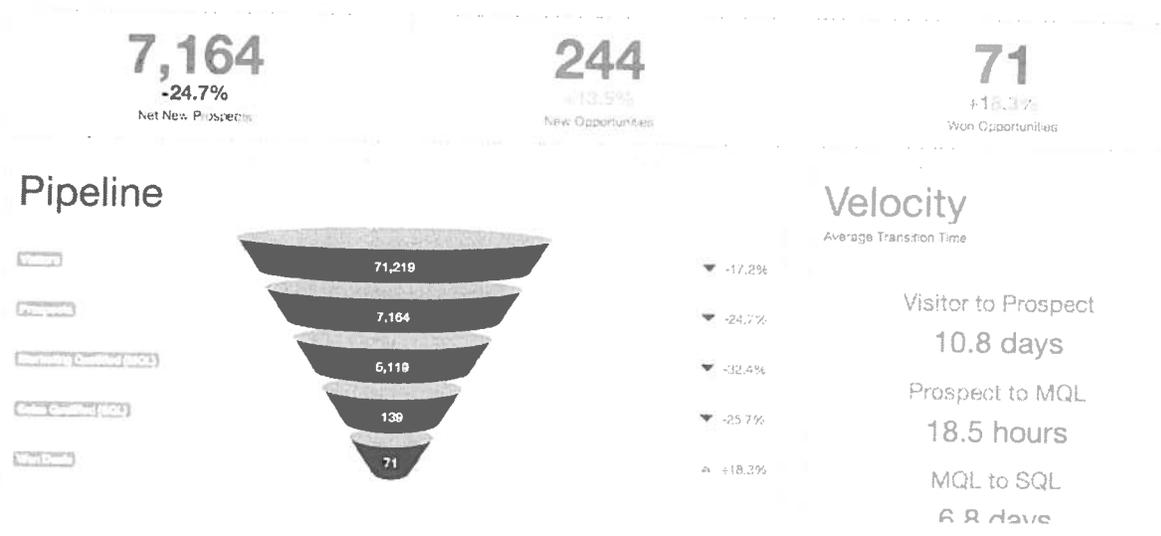


Figure 6: Report (Prospects for Lifecycle Stage)



[Open Activities](#) | [Activity History](#) | [Campaign History](#) | [Individual Email Results](#)

**Lead Detail**

Lead Owner: <b>Kevin Eckstein (Change)</b>	Lead Status: <b>Converted</b>
Name: <b>Acam Blitzer</b>	Email: <b>acam.blitzer@pardot.com</b>
Company: <b>Pardot</b>	Phone: <b>+1.404.492.6845</b>
Title: <b>VP of Marketing</b>	Email Opt Out: <b></b>
Industry: <b>Software</b>	CRM Vendor: <b>Salesforce.com</b>

**Pardot**

Pardot First Activity: <b>12/3/2010 6:40 AM</b>	Pardot Last Activity: <b>4/24/2013 6:46 AM</b>
Pardot Score: <b>1783</b>	Pardot Grade: <b>A+</b>
Pardot Campaign: <b>Google Buyer's Guide Campaign</b>	Pardot Rating: <b>☆☆☆☆☆</b>
Pardot First Referrer Query: <b>Lenoxsoft</b>	Pardot First Referrer Type: <b>Google</b>

**Prospect Activities**

**Activity**

- [Form: LenoxSoft Webinar\\*](#)
- [Visit: 5 page views](#)
- [Form: LenoxSoft Webinar\\*](#)
- [Page View: LenoxSoft Product - Energy Management - LenoxSoft](#)
- [Tracker: ...lenoxsoft.com/product.html](#)

Type	Campaign	Score	Date / Time
Success	LenoxSoft Natura Search (SEO)	50	Apr 24 2013 8:46 AM
Visit	Google AdWords - Energy Management Software	14	Apr 24 2013 8:47 AM
View	LenoxSoft Natura Search (SEO)	0	Apr 24 2013 8:47 AM
View	Google AdWords - Energy Management Software	10	Apr 24 2013 8:45 AM
Click	LenoxSoft Monthly Webinar	25	Apr 24 2013 8:45 AM

Figure 7: Report (Lead Detail)

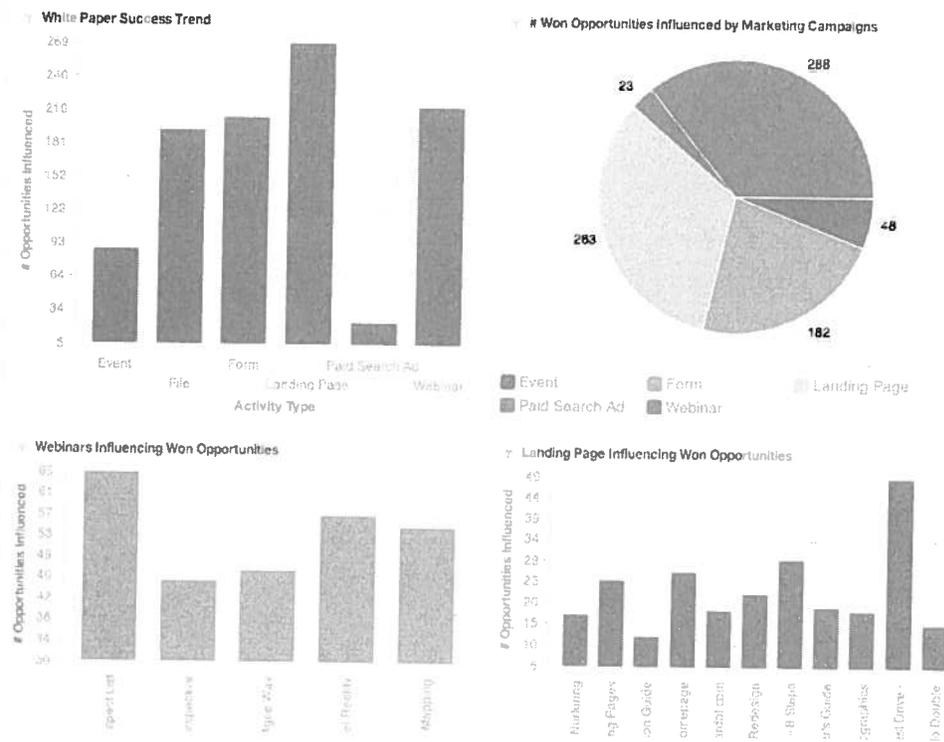


Figure 8: Analyze Campaign Effectiveness

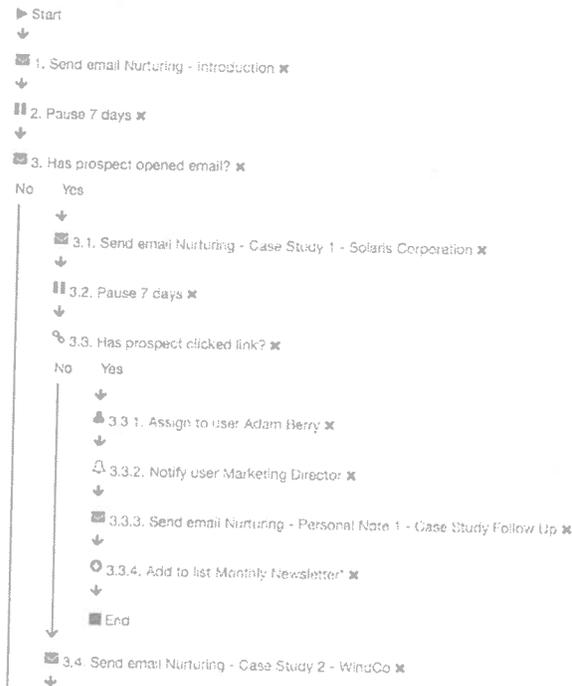
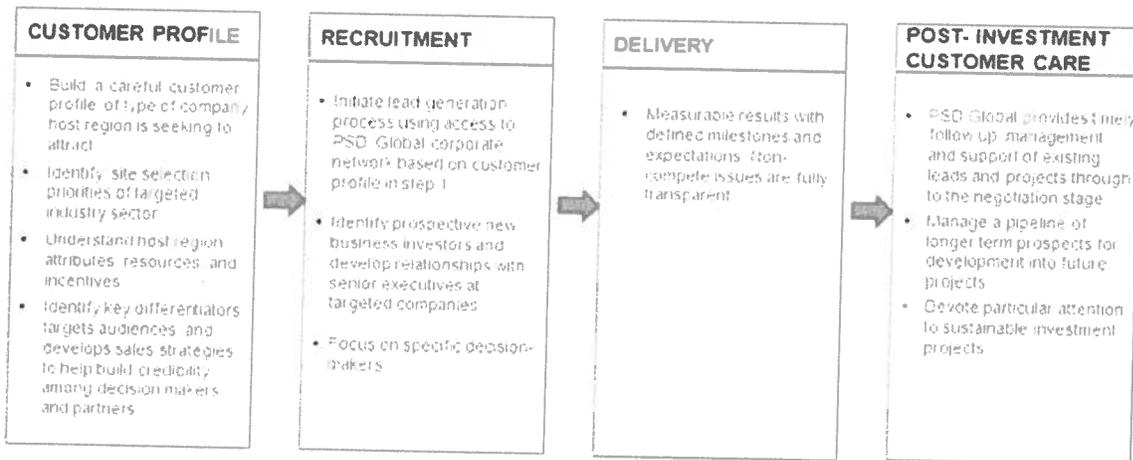


Figure 9: Track Lead Generation Process

### Post-Investment Customer Care

PSD Global solutions ensure continued client engagement with our Post-Investment Customer Care. After the specified number of leads are identified, PSD Global will continue to generate leads at no additional charge. The company will also continue engaging with Erie County and BNE in follow-up, management, and nurturing of leads and investment projects.





## b. Trade Shows & Other Marketing Activities

PSD Global will provide the BNE and Erie County with information about relevant trade and/or FDI events. Information will include a prioritization of the events and an assessment of the pros and cons of Buffalo area participation. We will recommend between 2 and 3 trade events per year (depending on annual budget).

Our approach is to emphasize industry events, such as trade shows and conferences, as focal points for industry-specific campaigns within the overall marketing program to complement and enhance on-going lead generation work. The key to success is comprehensive, early preparation. We believe that results from exhibiting at and/or attending a trade show or conference, while helpful from an awareness-raising perspective, can be boosted dramatically if the trade show or conference is part of a more comprehensive initiative that includes:

- Market research to identify appropriate senior executives (not sales staff) at target companies who will be attending the conference/show.
- Pre-arranged business meetings at an on-site meeting room, hospitality facility (such as a hotel suite), or other nearby venue. (Meetings on the trade show floor or at an exhibition booth are not ideal situations and will be avoided if possible.)
- In the case of major programs that involve BNE staff or senior officials, a small on-site team from PSD Global will manage the program, provide briefings, facilitate meetings, adjust scheduling as required, provide troubleshooting, and coordinate meeting notes.

Based on our experience, we do not advocate exhibition booths as part of our trade show programs as a tool for lead generation because of value-for-money considerations. In addition to the trade shows and events we would arrange meetings at and attend, PSD Global will also propose some specific seminars that can be co-hosted with organizations and industry-specific associations.

## 2. Reports

PSD Global will communicate regularly with the county and BNE via detailed reporting—monthly, annually, and on an ongoing basis as leads are identified. These reports will supplement data entered into BNE’s online Microsoft Dynamics CRM system.

As noted above, our team will have the thoroughgoing support of offices in both hubs as well as engaged support from PSD Global offices in Washington D.C., Fairfax, Virginia, and Dusseldorf, Germany. Project administration and all project needs will be supported by a full professional office staff, a cutting-edge CRM system and CRM management, and secure servers for confidentiality.

### ***Monthly/Annual Reports***

We will provide monthly and annual reports that supplement data about trade and investment activities

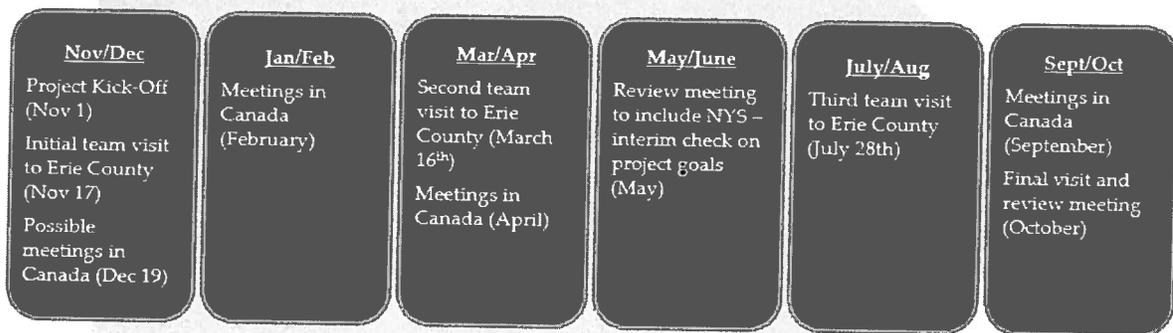
### ***Identified-Lead Reports***

As described in the previous section, we will also provide regular and frequent Identified-Lead Reports that will detail information about each lead as they are recognized (for details, see above, 1.3).

### 3. Timeline

PSD Global would like to propose a project start date of November 1, 2014. The project will have a duration of 12 months, with meetings and client reviews as shown below:

#### Proposed schedule of meetings and client reviews – Erie County/BNE





## E. Cost & Deliverables

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PSD will charge a flat fee of \$100,000 to be paid in equal monthly payments. The first payment will be invoiced before start of the project and the final balance after acceptance of 40 leads (minimum) by the Client.

PSD will deliver a minimum of 40 qualified investment leads and aim for an average of 4-5 per month. PSD will also assist in the follow up on those investment leads to ensure each is driving to the actual investment stage. This may include multiple visits to the Canadian investors HQ and coordination with the County and BNE on follow up steps. Should PSD reach the 40 qualified leads during the project, full activity/ staff time and efforts to secure additional leads will continue. This is only to serve as a minimum guarantee and the program will ensure 12 months of active investment promotion.



## F. Next Steps and Follow-Up

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On behalf of the Executive team at PSD Global, we thank you for the opportunity to submit a Letter of Proposal for attracting Canadian investment to the Buffalo area. We look forward to discussing our project plan with you in more detail in the coming weeks. Please let me know if you have questions or would like to schedule a time to discuss our solution.

Sincerely,

Patrick Dine  
PSD Global – President & CEO  
[dine@psdglobal.com](mailto:dine@psdglobal.com)  
703 981 2097



## Appendix 1: Sample Lead Report

Company Details	
Company Name	
Company Address	
HQ Address	
Main switchboard #	
Main fax #	
Web address	
Ticker symbol	
Decision Maker Contact Details	
Name	
Title	
Position	
Phone	
Email	
Fax	
Decision making rating	
Company Profile	
Background	
Business activity & industry classification	
Competitors	
CAPEX (if known)	
Investment timing	
# of employees	
# of jobs	
Project type	
Financials	