



CARLETON UNIVERSITY
BUSI 1800
Introduction to Business
Fall 2018 - Section B

Instructor: Andrew Webb, PhD
Office: 1721 DT
Office Hours: By appointment
Email: Andrew.webb@carleton.ca
Phone Number: 613-520-2600 ext. 5063

TA: Quinn Angel
Office Hours: By appointment
Email: QuinnAngel@cmail.carleton.ca

Course meets: Tuesday at 8h35-11h25

Prerequisite(s): restricted to B.Com. students with first-year or second-year standing.

Course Description and Objectives:

Introduction to contemporary businesses in a complex economy, their role in the society, their history. The various functions that come together to define a business will be examined. All forms of business communications emphasized.

Lectures three hours and tutorial one hour a week.

This introduction to business is built around three main objectives:

- Gaining general knowledge on businesses and business management
- Developing the ability to apply this knowledge to practical situations
- Developing human skills and communication skills

Throughout the 12-week course Students will

1. **Remember** (recall facts and basic concepts), **understand** (classify, describe, discuss, explain, identify, locate, recognize, report, select and translate ideas), **apply** (Use information in new situations), and **analyze** (draw connections between ideas) fundamental concepts regarding businesses and business management communication, critical and reflective thinking, leadership, teamwork and

interpersonal skills through in-class, individual and group projects, as well as through presentations.

2. Apply and integrate acquired knowledge during an interactive, on-line case simulation where they will have the opportunity to make business decisions in all the different functional areas of a business including: Research and Development, Marketing, Production, Human Resources, and Finance/Accounting. In a team environment, students will make strategic planning and management decisions related to the products they design and produce.
3. **Remember, understand, and apply** strategies behind better decision-making and management.
4. **Remember, understand, and apply** the critical components of business communications, including writing and presentation skills, through hands-on activities and assignments. In addition, there will be several activities coordinated through the BCMC which are meant to prepare you for a career in business.
5. Have access to, and integrated knowledge from, guest speakers who will introduce the students to the different disciplines taught in the School, as well as essential academic and practical abilities and habits.
6. **Apply** the materials from the text book, lecture discussions and in-class guests to address course assignments which will take the form of projects such as written briefing notes and reports, which will involve preparing in-class presentations, providing individual and group contributions in class and tutorials, as well as through peer evaluations.

These course objectives are linked to the broader Goals of the Baccalaureate in commerce:

BC1 Communication Capabilities

Students are able to prepare and present well-organized and effective reports on business issues using appropriate supportive technologies

Learning Objectives

- 1.1 Write well-organized and effective reports on business issues.
- 1.2 Prepare and present oral reports on business issues in a well-organized and effective manner.
- 1.3 Demonstrate professionalism when interacting with peers, faculty, and business professionals in formal and informal business settings.
- 1.4 Demonstrate proficient and effective use of modern information and communication technologies for communicating and collaborating in organizational settings.

BC2 Critical and Reflective Thinking

Students will demonstrate the ability to identify a business problem, isolate its key components, analyze and assess the salient issues, set appropriate criteria for decision-making, and draw appropriate conclusions and implications for proposed solutions.

Learning Objectives

- 2.1 Identify the essential question, issue and/or problem.
- 2.2 Gather relevant data to effectively address the question, issue, and/or problem.
- 2.3 Recognize and evaluate assumptions, diverse points of view and ideas relevant to the question, issue, and/or problem.
- 2.4 Develop informed alternative solutions and evaluate them using appropriate analytical techniques.
- 2.5 Articulate implications and consequences that emerge from conclusions/solutions.

BC3 Knowledge Integration

Students will demonstrate the capabilities required to apply cross-functional business knowledge and technologies in solving real-world business problems.

Learning Objectives

- 3.1 Apply theoretical concepts to develop innovative, practical business solutions.
- 3.2 Develop an understanding of the cross-functional and interdependent nature of strategic business decisions.
- 3.3 Develop awareness and understanding of integrated enterprise information technology solutions in addressing business problems.

BC4 International Perspective

Students will develop an appreciation of the role and function of business in a complex world.

Learning Objectives

- 4.1 Identify the key issues and challenges of doing business in international settings.
- 4.2 Know when to adapt business decisions to different international settings.

BC5 Ethical Reasoning

Students will be capable of recognizing and resolving ethical issues that arise in business settings.

Learning Objectives

- 5.1 Recognize the value of incorporating ethics into work-life decisions.
- 5.2 Demonstrate the ability to recognize ethical issues associated with work and organizational decisions and actions, and to apply ethical principles to deal effectively with them.
- 5.3 Demonstrate an understanding of the impacts of organizational culture, structure, and systems on ethical behaviour, and the ability to manage features of these organizational characteristics in order to promote ethical behaviour throughout the organization.

General outline

Week	Date	Tasks all
1	01-8	<p>Attend lecture on: Course overview of contemporary businesses in a complex economy, and their roles in society ; Course outline / assessment / expectations ; Executive writing and referencing (APA style) ; Expected behaviour (Plagiarism, Email protocol, copyright, attendance, comportment during class etc.)</p> <p>Read: Brief history and context of Canadian Business - Boone CH 1 (The Changing Face of Business) and Boone Appendix D Personal Financial Planning</p> <p>Do: Have fun</p> <p>Do: Online exercises on this week's chapters</p> <p>Do: (In Tutorial) Practice Quiz chap 1</p>
2	01-15	<p>Attend lecture on: Economic Challenges Facing Contemporary Business</p> <p>Competing in World Markets</p> <p>Starting Your Own Business: The Entrepreneurship Alternative</p> <p>Read: Binder chap 3+4+6</p> <p>Do: Online exercises on this week's chapters</p> <p>Do: Tutorial (with TAs) "Researching, Citing, Writing & Co-Authoring" (Include examples of in text references and what are peer reviewed journals. How to cite exercise)</p> <p>Quiz Ch 3+4+6 (in Tutorial)</p>
3	01-22	<p>Attend lecture: Management, Leadership, and the Internal Organization</p> <p>Human Resource Management: From Recruitment to Labour Relations</p> <p>Top Performance through Empowerment, Teamwork, and Communication</p> <p>Read: Binder chap 7+8+9</p> <p>Do: Online exercises on this week's chapters</p> <p>Do: Tutorial (with TAs): "Excel Tips & Tricks" and quiz on chap 7+8+9</p> <p>Do: Prepare a resumé if choosing Teamwork option A</p>
4	01-29	<p>Attend lecture on: on Customer-Driven Marketing</p> <p>Product and Distribution Strategies</p> <p>Promotion and Pricing Strategies</p> <p>Read Chap 11+12+13</p> <p>Do: Online exercises on this week's chapters</p> <p>Do: Tutorial Quiz on chap 11+12+13</p> <p>Submit: resumé for Teamwork option A and B</p> <p>Submit: personal reflection A: your personal relationship with finance based on the readings of annex Boone Appendix D Personal Financial Planning</p>
5	02-5	<p>Attend lecture on Understanding Accounting and Financial Statements</p> <p>The Financial System</p> <p>Financial Management</p> <p>Read Chap 15+16+17</p> <p>Do: Online exercises on this week's chapters</p> <p>Option A – begin search for team</p> <p>In tutorial_quiz chap 15+16+17</p>

6	02-12	Attend lecture on Business Ethics and Social Responsibility + teamwork + exam prep Read CH 11 online or 2 binder + Teamwork - Schermerhorn Ch 12 Online only Do: Online exercises on this week's chapters In tutorial_quiz chap 2 + 12
7	02-19	Winter reading week – no classes or tutorials this week Do: Rest and relaxation
8	02-26	Do: Option A – Get hired by 2 nd year student team. Option B – self select and teams within your tutorial. Teams must be between 2 and 7 people. Everyone in the tutorial must be on a team. If any student is excluded from joining a team, all teams in that tutorial will be randomly selected by the TA. Do: Option B – individual simulation exercises + practice week Submit: personal reflection B
9	03-5	Attend: Lecture on personal assignments If Option B Introduction to simulation Lecture - Special Guest Susan Woodfine Team project Option A: Entrepreneurship speed interviews (TBD) Do: Option A – Work on term project Do: Option B – Simulation week 1+ Submit Simulation Briefing note assignment
10	03-13	Do: Option A – Work on term project Do: Option B – Simulation weeks 2 and 3
11	03-19	Do: Option A – Work on term project Do: Option B - Simulation weeks 4 and 5 Submit: individual assignments (March 22nd, 23h59)
12	03-26	Do: Option A – Work on term project Do: Option B - Simulation weeks 6 and 7 Submit: Personal reflection C (reflections on team work) (March 29th 23h59)
13	04-2	Do: course evaluation + team presentations: Option A in class; Option B in tutorials Submit: Option A – Entrepreneurship project (date TBD) Submit: Option B – Annual report (April 5th 23h59)

*Please Note: This schedule is preliminary. Although every effort will be made to adhere to this schedule, changes from time to time will be necessary as there are guest speakers at most of the classes. It is your responsibility to consult the detailed schedule and also you are responsible for reading any emails coming from your professor. On occasion your professor will send along important reminders by email to notify you of any changes in the schedule.

All assignments are to be submitted electronically, unless indicated otherwise.
Due dates for assignments, will be confirmed by the instructor by the mid-term
For uploaded soft copy assignments results will be uploaded in each of the tutorial sections in cuLearn.
Hard copies of projects will be retained by students.

Tutorials: 1 hour/week REQUIRED. Only attend your scheduled tutorial as you will be working with your team on your simulation during some of the tutorials.

Legend	UC	University Center
	RB	Richcraft Building
	TB	Tory Building
	ME	Mackenzie Building
	PA	Paterson Hall
	SA	Southam Hall
	CB	Canal Building
	CO	University Commons

TERM	CRN	CRSE	SEQ	DAY	START_TIME	END_TIME	START_DATE	END_DATE	INSTRUCTORS
201830	30529	1800	A	T	1435	1725	9/5/2018	12/7/2018	Webb, Andrew
201830	30530	1800	A01	F	835	1025	9/5/2018	12/7/2018	Webb, Andrew
201830	30531	1800	A02	R	1135	1325	9/5/2018	12/7/2018	Webb, Andrew
201830	30532	1800	A03	F	1535	1725	9/5/2018	12/7/2018	Webb, Andrew
201830	30533	1800	A04	F	1435	1625	9/5/2018	12/7/2018	Webb, Andrew
201830	30534	1800	A05	W	1135	1325	9/5/2018	12/7/2018	Webb, Andrew
201830	30535	1800	A06	F	1135	1325	9/5/2018	12/7/2018	Webb, Andrew
201830	30536	1800	A07	W	935	1125	9/5/2018	12/7/2018	Webb, Andrew
201830	30537	1800	A08	R	1535	1725	9/5/2018	12/7/2018	Webb, Andrew
201830	30538	1800	A09	R	1135	1325	9/5/2018	12/7/2018	Webb, Andrew
201830	30539	1800	A10	R	835	1025	9/5/2018	12/7/2018	Webb, Andrew

Reading(s)/Textbook(s):

Required Reading: Boone/Schermerhorn: Introduction to Business for BUS1800
WileyPLUS Access

Boone/Schermerhorn WileyPLUS provides you with access to the content above in digital format, practice quizzes, study tools, Adaptive Practice, graded homework and more all with easy access through your cuLearn BUS1800 course section. Take control of your learning with WileyPLUS and Adaptive Practice to track where to spend your time studying to get the most out of this course.

WileyPLUS Access can be purchased through cuLearn during the Registration process for \$70.00 plus taxes or a package of WileyPLUS with Boone, Introduction to Business 2nd Cd edition Loose-leaf is available at the Carleton bookstore.

Course Requirements & Methods of Evaluation:

Enrolment is restricted to students in the Bachelor of Commerce Program.

Prerequisite(s): first-year standing in B.Com.

A specific correction guide, or Rubric, will be produced for each project. Your T.A. can explain the details of how each project will be evaluated.

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

A+ = 90-100	B+ = 77-79	C+ = 67-69	D+ = 57-59
A = 85-89	B = 73-76	C = 63-66	D = 53-56
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52
F = Below 50			

WDN = Withdrawn from the course

PASSING THIS COURSE

This intention of this course is to initiate you to the roles and responsibilities in a learner-centered environment.

Frequently, students expect that a University classroom will be much like a high school classroom, albeit harder¹. In high school, students often learn that listening to a teacher (who does most of the talking), note taking, memorizing and the capacity to recall what the teacher wants to hear are essential for getting a good grade.

Figure 1 Major traditional roles and responsibilities

Traditional Student Roles	Traditional Student Responsibilities
Take lecture notes	Work mostly alone
Listen in class	Seek out the teacher if you have questions
Read the textbook	Read independently
Read other assigned reading	Develop study habits
Do homework	Develop your own time-management program
Take tests and quizzes	Organize the information
	Write papers on assigned topics
	Memorize

However, Herbert Simon (1996), a Nobel Laureate argues that “The meaning of knowing has shifted from being able to remember and repeat information to being able to find and use it. The goal of education is better conceived as helping students develop the intellectual tools and learning strategies needed to acquire the knowledge necessary to think productively.”²

In other words, “the illiterate of the 21st century will not be those who cannot read or write, but those who cannot learn, unlearn and relearn”

¹ Doyle, T. (2008). Helping Students Learn in a Learner-Centered Environment. Stylus Publishing, Sterling Virginia.

² Simon, H.A. (1996). Observations on the science of science learning. Oral presentation at meeting of the Committee on Developments in the Science of Learning for the Science of Science Learning: an interdisciplinary Discussion, Department of Psychology, Carnegie Mellon University, Washington, DC.

– Alvin Toffler (1970)

Thus, students in BUSI 1800 will begin to implement new roles and responsibilities that focus more on learning than on teaching. Put differently, my job is more about helping you learn how to learn than it is to teach you material that may very well be outdated by the time you graduate. Figure 2 highlights the learner centered roles and responsibilities.

Figure 2 Roles and responsibilities for students in a learner-centered environment

Learner-centered Students Roles	Learner-Centered Student Responsibilities
Self-Teach	Make choices about one's own learning
Collaborate with others	Take more control of one's own learning
Work in team/groups	Give input to the evaluation/assessment methods of the course
Take part in discovery learning	Give input to the course rules and
Teach others	
Evaluate others' learning	
Perform/present learning publicly	
Learn new how-to-learn skills and strategies	
Solve authentic problems	
Engage in reflection	
Demonstrate use of teacher feedback to improve performance	
Take learning risks	
Practice more	
Take class notes (or sketches)	
Read the textbook	
Write papers	
Take tests and quizzes	
Take part in class	
Do homework.	

To pass this course, you must attain a minimum of 50% on the total value of all of the assignments and activities heading into the final exam (in other words you must have a 35/70 combined for the projects) then you must also achieve a minimum of 50% on the final exam. If you suspect that you are going to fail it is recommended that you drop the course and sign up again for the next session so that you do not jeopardize your standing in the program.

For a schedule of assignments due and due dates, consult the **Detailed Class and Tutorial Schedule** and the **Overall Course Assessment** available on cuLearn. **Please print both documents** for your reference as there are multiple components to this course. Each student is responsible for retaining a hard copy of each assignment submitted.

ELEMENT	WEIGHT %
Individual work	
In class Quizzes	25
Personal reflections	10
Personal Project (s) (choose 2, or 3) a) Bloomberg project; b) Partnership proposal; c) Individual presentation of an academic article; d) One Case Study	25
Team work (choose 1)	
Option A Entrepreneurship project with 2 nd year students	40
Option B Simulation	40
1 st Simulation Briefing note	(5)
Simulation annual report	(15)
Simulation presentation	(10)
Simulation ranking	(5)
Peer evaluation	(5)
TOTAL	100

In class Quizzes (25%)

The material for the quizzes will be inclusive of all material covered during the course, including the simulation material and guest lectures. The quizzes will consist of questions drawn from lectures, textbook readings, videos, the simulation, presentations, tutorials and discussions in class. You must either be present to write the quizzes or you must present a

medical or other acceptable documentation to explain your absence. Do not book holidays until you can confirm the dates of your quizzes. I am not permitted to make any determination of whether your absence warrants a deferred quiz. If you miss a quiz due to a verifiable illness or emergency, you may apply to be considered for a deferred exam at a later date.

A one-sided 8 ½ X 12 sheet of paper, may be used as study notes during the exam. study note sheet will be signed by your TA before the exam and you may put as much, or as little, information as you want on the sheet. No other documents, books, or electronic devices may be used during the quiz.

Assignments:

4 cuPortfolio reflections; (10%)

CuPortfolio Reflections

- The first reflections (A) should focus on your personal relationship with finance based on the readings of annex Boone Appendix D Personal Financial Planning;
- The next reflections (B) should focus on the comments and observations provided on your work, in class discussions, something you read, or any other pedagogical tool used in the context of this class. This reflection should correspond to one learning objective of the Bcomm program. Creativity in your reflections is encouraged. For instance, you may produce a 3-5 minute video one reflection.
- The last reflection (C) should be related to your team work experience and should be linked to a different learning.
- It is essential that you import the cuPortfolio to cuLearn before the assigned timing.
- Each 3 paragraph (minimum) reflection on what (you did), so what (what does the feedback I received or reviewer comments mean to me) and now what (What will I change to learn better i.e. what will you stop doing, what will you continue doing and what will you start doing)
- Will be graded using the rubric provided on our cuLearn.

Personal project options (choose 2 or 3, best two grades will be retained)

A) Bloomberg project;

Situation

In this project, you are playing the role of a financial planner. A new client requests a recommendation for a company in which to invest 10 000\$ she just inherited. Her objective is long-term growth, but intends to consider this investment as part of an accessible emergency fund.

Mission

Your mission is to convince your client to invest in the firm you have chosen. To accomplish this task, you must choose one company in which she should invest and prepare a 2-page briefing note on the company.

Action

1. Go to a Bloomberg terminal (located towards the back of the main floor in the Library - or the 3rd or 9th floor computer labs in Sprott in the Dunton Tower) and create a log in for yourself.
2. Find a company that is of interest to you (any company will do).
3. Find the company description.
4. Prepare a briefing note using the recommended guide to briefing which is Parkinson, R.B. (2017). Classic Format of a Briefing Note.
5. This report should include at least 2 academic references and an annex with at least 2 excel graphs that support your arguments.
6. The recommended guide to briefing notes is Parkinson, R.B. (2017). Classic Format of a Briefing Note. Retrieved at <http://www.writingforresults.net/classic.pdf>

Coordination

The briefing note needs to include one annex that presents the DES snapshot for the chosen company.

1. In the search bar at the top, type in IAM and hit enter * this is a critical step as it is the one of using the Bloomberg terminals located at the library identify one company
2. In the top right corner, go to the page with the **yellow arrow** and **save screen as file (save as a PDF)**. If you have problems uploading the PDF then save as an image and insert this image into your Assignment Template document which can be found in the top section of cuLearn for the course.
3. Name the file and then upload the file to cuLearn. Be sure that your snapshot has your name on it. Below is an example of a screen shot that Mason Brown (The Fund portfolio manager) pulled for the S&P index – ensure your format is the same, and note his name “MASON BROWN CARLETON UNIVERSITY” in the top right. **If your name does not appear where his presently is, you will receive no marks.**

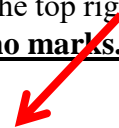


Figure 3: Annexe 1 of Bloomberg project



Be sure to double-click on the HEADER and the FOOTER of the page to edit the NAME, STUDENT NUMBER, TUTORIAL NUMBER and other related personal information. If we receive your assignment and it does NOT have your name on it and tutorial number on it, you will receive a mark of 0.

Please include a standard BUSI 1800 cover page

B) Partnership proposal; (because this assignment requires a bit more work, there is a 5% bonus given to this grade, up to a maximum of 100%)

Situation

CONGRATULATIONS! You have been selected by the Dean to prepare a partnership proposal that will be presented by the Sprott School of Business's Dean to an organization of your choice. The partnership is intended to provide experiential learning opportunities to Sprott students.

Mission

Your mission is to identify an excellent partner for Sprott and produce a partnership proposal outlining the **best** project that students from the Sprott School of Business could execute for the chosen organization.

Action:

This assignment will be individually.

Coordination:

The complete assignment will include

- A standard BUSI 1800 cover page

- b) A max 2 Page BUSI 1800 Briefing note
- c) An annex with two original excel graphs
- d) At least 2 references from academic sources that support your arguments

This briefing note should summarize the following:

1. **The situation/problem** (which includes):
 - a. An **Evaluation** of the Target Organization and what makes it successful. **Analyze** the Organization using a SWOT and PESTEL analysis (must be included);
 - b. An **Evaluation** of Sprott and what makes it successful. **Analyze** the Sprott School of Business using a SWOT and PESTEL analysis (must be included);
2. **The Solution** (which includes)
 - a. An **Evaluation** of how Sprott students can offer solutions to the Organization. For example, Sprott students could provide valuable marketing support by conducting projects such as A, B, or C;
 - b. **Create (Design and develop)** and present an original project that could be performed by students of the Sprott Business School. The project should be argued to be the most helpful to the target Organization and should include **SMART** objectives;
3. **The interest** for the Partner: Analyze the benefits that the target Organization would receive in a partnership with Sprott. State available facts and figures to substantiate your proposal.

Coordination –This project should include:

1. A clear, concise, and snappy title.
2. A standard BUSI 1800 cover page
3. Using APA referencing style, (<https://owl.english.purdue.edu/owl/resource/560/01/>) your briefing note and report must include 2 references to academic sources other than the course book.
4. The recommended guide to briefing notes is Parkinson, R.B. (2017). Classic Format of a Briefing Note. Retrieved at <http://www.writingforresults.net/classic.pdf>
5. Must be supported by at least one annex that presents at least two different original charts you built with excel.
6. Visiting the Target Organization is highly encouraged!
7. Our Dean is counting on you to be ready for the meeting.

C) Individual presentation of an academic article;

You may also choose to do an academic journal article presentation (5 minutes in length) on an article from an academic business journal (such as the Academy of Management or Harvard Business Review) (not a magazine article). To find a business journal, go to the library home page and select the option of journals and then select Business Source Complete for an extensive list of options. Academic journals have a **volume** and **number**, begin with an **abstract** and have many references at the end. For example: Collis, D. J., &

Rukstad, M. G. (2008). Can you say what your strategy is?. *Harvard business review*, 86(4), 82-90 is an excellent article from a top peer-reviewed journal that provides an awesome overview of what strategy is.

Your task is to summarize the key points and determine how this relates to business in a practical sense and present these findings to the tutorial. Providing a critique of the article, discussing what should be there, but isn't, as well as an argument on why this article is important is also expected.

Hint: The choice of management journal and article is up to you, but if you choose a subject you are passionate about, your presentation will be more convincing. The approach to the presentation is flexible and you must use your discretion to determine the most effective way to present the article.

D) Case study (produce a 2-page briefing note on your proposed solution.)

Case 1:

Pizza, Oh! ^{1, 2}

Situation

The Company

Pizza, Oh! is a successful Canadian chain of pizza outlets operating throughout Canada and the United States. Unlike other similar outlets, it has avoided positioning itself as a "fast food"-type restaurant. Instead, it emphasizes four elements: Superior food quality; excellent service; a posh, yet not "in-your-face" environment, suitable for adult upscale patrons aged roughly between 25 and 50; and pricing that is at least 20 percent higher than at other pizza restaurants.

Among other features, the chain's restaurants feature nicely done wood-burning exposed-brick pizza ovens which are visible by all patrons no matter where they sit. This way, patrons can observe the making of the product – complete with a view of the burning wood base in the oven when the doors open and close, and of the pizza makers as they roll out the product on a bench and then give it its distinct shape by tossing it into the air, before the raw pizza is placed in the oven using long-handled and fire-resistant wooden shovels. The entire setup is intended to add an element of "made right here for you," and a feel of authenticity and exclusivity, to the customer's dining experience. In some ways, the company's approach is reminiscent of the one used by Stimorol, the Denmark-based chewing gum, which introduced its products to New York City using a rather provocative slogan: "At last – chewing gum for the rich".

Although children are, of course, allowed in, and suitable amenities for them are provided (e.g., booster- and high-chairs), the general environment and prices at Pizza, Oh!'s outlets don't encourage their presence and there is no separate children's menu. As a result, few parents bring their children along. The relative absence of children, coupled with subdued lighting, the "oven" experience, and other elements of the company's setup all contribute to the chain's "for adults" image.

International Expansion

The company is now considering overseas expansion. It has decided to use a two-tiered entry mode approach: In each country, there will be a fully owned sales and marketing office, on the one hand, and independently owned franchised outlets, on the other. This is done to achieve rapid international expansion, through the franchises, while maintaining close control of each country's operation, by having local corporate representation. The company's local offices abroad would not have to be major operations – even a small office with a couple of managers and staff

would be enough to signal to the franchisees and others that Pizza, Oh! was not an "absentee landlord" but, rather, that it was "here" and truly involved with the local market.

Pizza, Oh! wants to approach international expansion systematically. It wants to avoid the mistakes made by other companies when they first internationalized. A key element of this approach is deciding from the start whether a standardized or customized strategy will be used in each country concerning product and promotion.

A customized strategy would call for different menus, types of locations, architectural and atmospheric design of outlets, and promotional strategies in each market, all designed to suit local tastes. The company's basic strategy would remain intact in terms of the quality, service, and upscale environment and pricing, but the way it would be expressed in each market would differ so that it matches each country's unique local characteristics.

A standardized strategy would call for selecting one or more key features that make the company and its products different from others, and then implementing it worldwide without change. Company executives think that, if a standardized approach were to be chosen, it could take one of three main forms:

Presenting a "Canadian" image internationally. This might involve, for instance, emphasizing the company's Canadian origin; using Canadian back bacon (which is known as "back bacon" in Canada but as "Canadian bacon" abroad, where it is considered a special delicacy), and emphasizing the use of this culinary specialty; using other Canadian products and ingredients where possible, ranging from Canadian cheeses to Canadian meat products, including bison and caribou, and even to the possibility of serving Ice Wine; and generally decorating the outlets so that they portray a sophisticated and yet very Canadian image, including "clean nature," "honesty and integrity," and so on. The company that while its overall positioning and characteristics were not common in most of the world, and so they might suffice for establishing its competitive advantage in many countries, wood-burning brick ovens and upscale pizza outlets were common throughout Europe – and so a Canadian image might provide that extra *je ne sais quoi* needed to make Pizza, Oh! competitive in that very important market as well.

Presenting a "neutral" image insofar as the chain's origin is concerned, that is, appearing as a "global" company, and letting success ride, instead, on the company's unique combination of the features outlined above (quality, service, posh environment, high prices, all leading to an overall "adult" orientation). This, the company's managers felt, would be ok for most markets beyond Europe, and as for Europe, they might consider other measures, such as stronger advertising and more careful location selection (e.g., perhaps starting from smaller provincial markets, where competition would be less, and move to major urban centres only after the company was firmly established in a country) that would help to make them more competitive.

Regardless of whether the image would be Canadian or global, the degree of standardization could vary – some strategic and execution elements might be standardized while others would be allowed to vary across markets. Pizza, Oh! executives felt that, for example, it might be possible to standardize the "excellent service" and/or "high quality, high price" component, while developing unique promotional approaches in each market. Or, conversely, advertising could be standardized but prices might be kept at lower levels in markets that are less-well developed than North America.

A particular issue that gave company executives migraine-force headaches was the firm's brand name. This had been developed when the company was first founded many years earlier, at which time its marketing approach was closer to that which we normally see in other outlets of this type—a more casual restaurant, welcoming to kids and reasonably priced, which was well-expressed in the name's playful nature. But, spurred by the need to face growing competitive challenges in North America, a few years later the company switched to its current, more upscale strategy. The new approach seemed to be a winning formula, notwithstanding that, fearing the loss of clientele if they made a complete break with the company's past, the marketing managers at the time shied away from also changing the company name. Since the company continued to do well afterwards, North American customers seemed to have accepted the somewhat awkward combination of a playful name attached to an upscale dining experience.

But with the coming expansion overseas, and with the benefit of hindsight, the current managers felt they had to reconsider the brand name once again. They saw three options here. One would be to keep the

current brand and expand it globally, acting on the belief that this is the whole idea behind “globalization” and that building on a proven name would help the expansion. A second would be the reverse – grab the opportunity of overseas expansion to change the name in North America as well. After all, successful as it had been shown to be, it still didn’t match the new strategy – and many companies had shown that if a brand name change is handled carefully, the repercussions on existing markets are minimal (the switch from Datsun to Nissan was often brought up as an example in discussions on this issue). Lastly, the third option was to go with two brand names – leaving the existing one for North America but developing a new and different one for overseas (or even, in an extreme case, different names for different markets; after all, even Nestlé, the global food and beverage giant, uses this approach for some of its products). This would enable the company to “correct the initial error” of maintaining a playful name for an upscale brand, insofar as overseas markets were concerned, while also maintaining the existing name in North America, since customers here didn’t seem to mind.

Mission:

Your mission is to prepare a Briefing Note recommending the operationalization of the brand name to be used for the overseas expansion.

Action:

You must prepare a max 2 page (annexes, if any, do not count for the 2 page maximum) briefing note that outlines your recommendation(s);

You must use the standard BUSI 1800 Briefing note template;

Of course, tools such as SWOT, PESTEL should be used to support your case;

References must follow APA referencing style and 4 are required;

The standard BUSI 1800 rubric will be used for the corrections;

Keep calm and carry on!

-
- ¹ The events described in this case are real but names and some dates and other facts are disguised to protect confidential information and/or improve the learning experience.
 - ² This case was prepared by Dr. Nicolas Papadopoulos, Chancellor's Professor of Marketing and International Business at the Sprott School of Business, Carleton University, in Ottawa, Canada. It is designed solely for use as a basis for education and training and is not intended to illustrate appropriate or inappropriate handling of any aspect of business management.

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Team assignments

You have 2 choices for your team assignment: Option A is the creation of a business plan with 2nd year students

Option B: Is to conduct a Praxim simulation:

Option A:

Situation

Students enrolled in BUSI 2800 must prepare a business plan and now have the option of “hiring” one or two BUSI 1800 Students to assist them.

Mission

If you choose option A, your mission will be to assist one team of 2nd year students in the creation of a business plan

Action

Once selected, you will be working with, and for, a team of 2nd year students. From them, you will learn more about business plan writing and will accordingly, integrate the notions acquired in the first half of the semester.

You will also need to produce a short (at least one page) reflection on your experience.

Coordination

- For this option, you must first get selected. To this end, you will be required to submit a resumé and participate in a speed interview session (dates TBD);
- Your grade for this work will be the grade your collective business plan receives + the grade you receive for your personal reflection on your experience;
- As it is a privilege to be selected for this project, you will receive a 5% bonus on the grade you will receive to the business plan. (to a maximum of 100% for this assignment). To receive this bonus, you must make a verbal report on your progress to Dr. Webb every Tuesday at 14h30 in our regular classroom;
- If you get fired from your team with cause, you will lose the 5% bonus and will be required to complete a “business plan on a napkin” (to still have an opportunity to integrate the notions acquired in the class). If you get fired without cause, you may keep the 5% bonus but will still have to complete your business plan on a napkin exercise;
- If you need to “fire” your 2nd year student with cause, you will retain the 5% bonus and will be given the opportunity to complete one “your business plan on a napkin” exercise.

Option B

There is a registration fee of around 30\$ for this simulation.

Simulation Briefing note.

Situation

As the managers of a new Kayak Company, you must inform your board of directors of the strategic orientation you intend to follow.

Mission

To prepare a Briefing note (BN) to inform your board of directors of your chosen strategy

Action.

Using the standard BUSI 1800 briefing note template (Available on cuLearn), you must prepare a 2 page (single spaced) briefing note to introduce your team and outline your Strategy.

For tips on completing a BN, refer to <http://www.writingforresults.net/classic.pdf>

This assignment should include at least 2 academic references

This assignment should include an annex with 1 excel graph that you create. The library or the following link may be helpful: <https://support.office.com/en-us/article/Excel-training-9bc05390-e94c-46af-a5b3-d7c22f6990bb>

Simulation Project annual report

Situation

It is time to report back to your board of directors on the fate of your company.

Mission

After completing the allocated rounds for the simulation, you must prepare an annual report to your board of directors on how well you did.

Action

As noted in the Learning Objectives, students in this course will be required to participate in a team-based on-line simulation. Students will be required to sign up for simulation after reading week.

Over the course of the semester, teams will make important business decisions that will spell success or failure to your firm.

You will have added control over your destiny as teams will be self-selected within the tutorials.

Coordination

- The Simulation annual report components including:
 - 1 X Briefing Note to your company's board of directors.
 - The final briefing note must summarize a minimum 4-5 page annual report that provides more details about the performance of the company. As any annual report, it should include a letter by the CEO, photos, a report by either the product divisions or the functional divisions as well as the key financial information. Throughout, we should see details about each functional group, the overall strategy, a SWOT and PESTEL analysis, as well as three excel charts at least 5 different academic references.
 - <http://www.writing-skills.com/how-to-write-annual-report> or <https://www.richardhollins.com/blog/how-to-write-an-annual-report/> may give you some more ideas about annual report writing.
 - More details of the 2 briefing notes, the annual report, final presentation and process for firing unproductive team members will be provided in your tutorials.

LATE POLICY

There will be zero tolerance for late assignments. Please note that the simulation deadlines are non-negotiable as they are set by a computer for the entire class. If you miss a deadline, you will forfeit the marks. The only valid excuse for missing a deadline is for medical reasons or death in the family and must be documented with a medical certificate. Any other reason (such as travel, etc...) will not be considered. In such circumstances separate arrangements may be made. If you miss a deadline for a reason that is not deemed as legitimate, your mark will be zero.

Important Dates and Deadlines – Winter 2019 Graduate, Undergraduate and Special Students

SEE <https://carleton.ca/registrar/registration/dates-and-deadlines/>

ADDITIONAL INFORMATION

Class Participation

Active participation in class by each and every student is the foundation of any effective project based learning experience. Active participation improves the learning experience and assimilation of material, as well as creates a dynamic learning environment. In order to effectively participate, the first step is preparation. Readings, lectures, and experience related to the upcoming course material should be reflected upon before the class. Think about the what, so what and now what of the upcoming lecture and ask yourself *why does this matter?* Participation should be relevant to the current discussion and includes asking and answering questions, translating the subject into a pertinent and relevant experience, examining the material for gaps, and always be looking for “the dog that didn’t bark”, which is a metaphor for something important that should be there but isn’t. Active listening and constructively critiquing ideas in a respectful manner is also expected.

Course Sharing Websites

Student or professor materials created for this course (including presentations and posted notes, labs, case studies, assignments and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

Access cuLearn through Carleton’s student portal. Login using your name and your password. This will allow you to access Carleton Central, cuLearn and your email. Schedules, lecture slides, assignment instructions, grades and messages can be found on cuLearn. Please consult before emailing questions. Only emails using your Carleton email (e.g. john.smith@carleton.ca) and your tutorial number will be answered.

Given the nature of the on-line simulation activities that will be taking place primarily during the scheduled class time and tutorials, it is helpful if students bring a laptop to the classes and especially the tutorial OR have access to or share a laptop during class time. HOWEVER, we do realize that not everyone might have the means to bring a laptop; however, as long as **at least one member of the group has a laptop with them, the team will be able to complete the required exercises.** It is advisable that 2 or more members of the group have a laptop with them in the tutorials but it is not required. Laptops are only to be used for course work and not surfing the web. The same holds true for cell phones. **Doing emails or surfing the web during class will not be tolerated.** Using a cell phone or laptop for unauthorized reasons (non-course work) can result in you being asked to leave the classroom.

Group work

The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor

may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Academic Regulations, Accommodations, Etc.

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>

Requests for Academic Accommodation

You may need special arrangements to meet your academic obligations during the term. For an accommodation request, the processes are as follows:

Pregnancy obligation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website:

carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

Religious obligation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website:

carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

Academic Accommodations for Students with Disabilities

If you have a documented disability requiring academic accommodations in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or pmc@carleton.ca for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC no later than two weeks before the first in-class scheduled test or exam requiring accommodation (if applicable). After requesting accommodation from PMC, meet with your instructor as soon as possible to ensure accommodation arrangements are made. carleton.ca/pmc

Survivors of Sexual Violence

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and is survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: carleton.ca/sexual-violence-support

Accommodation for Student Activities

Carleton University recognizes the substantial benefits, both to the individual student and

for the university, that result from a student participating in activities beyond the classroom experience. Reasonable accommodation must be provided to students who compete or perform at the national or international level. Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist.

<https://carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf>

For more information on academic accommodation, please contact the departmental administrator or visit: students.carleton.ca/course-outline

Academic Integrity

Violations of academic integrity are a serious academic offence. Violations of academic integrity – presenting another’s ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student – weaken the quality of the degree and will not be tolerated. Penalties may include; a grade of Failure in the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, amongst others. Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <https://carleton.ca/registrar/academic-integrity/>

Sprott Student Services

The Sprott student services office, located in 710 Dunton Tower, offers academic advising, study skills advising, and overall academic success support. If you are having a difficult time with this course or others, or just need some guidance on how to successfully complete your Sprott degree, please drop in any weekday between 8:30am and 4:30pm. Our advisors are happy to discuss grades, course selection, tutoring, concentrations, and will ensure that you get connected with the resources you need to succeed! <http://sprott.carleton.ca/students/undergraduate/learning-support/>
Be in the know with what’s happening at Sprott: Follow @SprottStudents and find us on Facebook SprottStudents Sprott.

Centre for Student Academic Support

The Centre for Student Academic Support (CSAS) is a centralized collection of learning support services designed to help students achieve their goals and improve their learning both inside and outside the classroom. CSAS offers academic assistance with course content, academic writing and skills development. Visit CSAS on the 4th floor of MacOdrum Library or online at: carleton.ca/csas.

Important Information:

- Students must always retain a hard copy of all work that is submitted.
 - All final grades are subject to the Dean’s approval.
 - For us to respond to your emails, we need to see your full name, CU ID, and the email must be written from your valid CARLETON address. Therefore, it would be easier to respond to your inquiries if you would send all email from your Carleton account. If you do not have or have yet to activate this account, you may wish to do so by visiting <http://carleton.ca/ccs/students/>
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SPECIAL NOTE:

- **Your instructor will not reply** to emails which ask for information that was either supplied verbally in class, is in class notes, was provided in tutorials/labs, emailed or was posted on cuLearn. *The course Q&A is the best place to ask questions and find answers.* Only personal questions or concerns may be asked directly to your Professor.
- **Do not expect** an email reply if you do not use the proper email procedure – we only respond to Carleton email addresses. A minimum of business etiquette is expected when corresponding with your professor. We do not respond to other emails like gmail, hotmail, rogers etc.
- **Do not expect** a reply in the evening or over the weekend.
- **Unless your question is personal**, you must first address your question to your TA, then the head TA. When writing to Dr. Webb, please include the name of your TA.
- Only pdf and word documents will be accepted.

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Appendix B – Declaration of Academic Integrity (to be signed by each Simulation team and handed in to your respective TA)

Declaration of Academic Integrity

Course # :

Term and year :

Title of project/paper : Or Assignment #

The University Senate defines plagiarism in the regulations on instructional offences as: "Plagiarism is presenting, whether intentionally or not, the ideas, expression of ideas, or work of others as one's own.

Borrowing someone else's answers, unauthorized possession of tests or answers to tests, or possession of material designed in answering exam questions, are also subject to university policy regarding instructional offences.

I/we declare that the work submitted herewith is my/our work. All sources have been referenced in the footnotes, endnotes or bibliography. This work has not been shared with anyone outside this group. Signature of students

Everyone must sign to receive a grade

Student Name

Student ID

Student Name

Student ID

Student Name

Student ID

Student Name

Student ID