

## **BUSI 4205, Section B**

### **International Marketing Strategy\***

**Winter 2018**

Dr. Nicolas Papadopoulos 904 Dunton Tower phone: 520-2600 x2382 e-mail: nicolas.papadopoulos@carleton.ca	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="border-bottom: 1px solid black; border-right: 1px solid black; padding: 5px;">what</th> <th style="border-bottom: 1px solid black; border-right: 1px solid black; padding: 5px;">when</th> <th style="border-bottom: 1px solid black; padding: 5px;">where</th> </tr> </thead> <tbody> <tr> <td style="border-right: 1px solid black; padding: 5px;">Class meets:</td> <td style="border-right: 1px solid black; padding: 5px;">Wed 11:35– 2:25</td> <td style="padding: 5px;">316 SA</td> </tr> <tr> <td style="border-right: 1px solid black; padding: 5px;">Office hours:</td> <td style="border-right: 1px solid black; padding: 5px;">Wed 2:35– 4:00</td> <td style="padding: 5px;">904 DT</td> </tr> <tr> <td colspan="3" style="padding: 5px; text-align: center;">and by appointment</td> </tr> </tbody> </table>	what	when	where	Class meets:	Wed 11:35– 2:25	316 SA	Office hours:	Wed 2:35– 4:00	904 DT	and by appointment		
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#### **I. OBJECTIVES**

Just as Canadians buy foreign products, so do many buyers abroad buy Canadian ones – Italian pasta makers insist on prairie durum wheat, Emiratis sip on smoothies by Yogen Früz, Indonesians buy BlackBerries and enjoy splashing at waterparks by WhiteWater West, and countries worldwide buy Bombardier high-speed trains and CAE flight simulators. It is hard to think today of an organization or individual whose daily life is not, in one way or another, touched by foreign products, and so a good grasp of global trends, how foreign markets work, and strategic international marketing has become a must for many managers. This is especially so in Canada, which exports about a third of its GDP and is one of the world's major trading nations.

The main objective of this course is to develop a managerial and strategic understanding of international marketing, with emphasis on the need to improve the international competitiveness and performance of Canadian business. More specifically, this course will:

- examine the role of marketing in world markets and review its theoretical justification;
- provide an overview of Canadian business in the international context (structure, problems and opportunities, causes and results of performance, etc.);
- study marketing theory and management in light of vastly different political, cultural, legal, and economic environments abroad; and
- relate Canadian business needs to problems and opportunities in foreign markets.

I hope this course will be challenging, fun, and interesting, but it is not designed to be easy. It deals with cutting edge and mostly “foreign” managerial issues, and so it covers terrain that will often be unfamiliar. *Connecting the course effectively to your other learning and to a global management mindset requires a high level of engagement and performance.* I promise to do my utmost to help you succeed, and in taking this course I trust you will join me in giving your “100%++” to help enrich your classmates, me, others in your future, and of course yourself.

#### **II. COURSE DESCRIPTION AND PREREQUISITES**

Description: “The marketing function in international markets from a strategic and managerial perspective. Environments of foreign markets in relation to marketing research, international branding and positioning, and product, price, distribution, and communication strategies. International expansion methods and foreign market evaluation and selection.”

Prerequisites: “Third-year standing and BUSI 2204 or BUSI 2208 with a grade of C- or higher.”

### III. READING MATERIALS

**Required text:** Available at the Carleton Bookstore: Carlyle Farrell (2015), *Global Marketing: Practical Insights & International Analysis* (Thousand Oaks, CA: Sage); available on reserve at the Library and/or inquire with the instructor: P.R. Cateora, N. Papadopoulos, M.C. Gilly, and J.L. Graham (2011), *International Marketing* (Whitby, ON: McGraw-Hill Ryerson; 3<sup>rd</sup> ed.)

**Readings on reserve through Ares** (other readings may be assigned from time to time):

- a. Mel Hurtig, "Canada on a Platter"; in *International Business*, ed. by K.C. Dhawan)
- b. Harold Crookell, "Fortress Canada in an Interdependent World"; *Business Quarterly*
- c. IKON Research Group, "'Made in Canada', Eh? A Cross-National and Longitudinal Study of Consumer Views on the Competitiveness of Canadian Products"
- d. Nicolas Papadopoulos and Derek Jansen, "Target Countries for Export"; *monograph*

**Note:** Having simply "taken" basic marketing (the course prerequisite) is not enough. The operating assumption in this course is that you actually have a good working knowledge of marketing basics including such core concepts as SWOT analysis, segmentation, positioning, the product life cycle, break-even analysis, marketing mix strategy, and so on. If you have any doubt that your knowledge of basic marketing is substantive and current, an additional reading requirement due on Session 2 is: "Any intro marketing text".

### IV. METHOD AND EVALUATION

- See "Summary of Evaluation" later in this section for due dates and marking weights. The due dates are also shown in "V. Class Schedule".

#### 1. Class Contribution (CC)

CC is the classroom equivalent to professionals' participation in and contribution at meetings. It is an important part of success in this course and it is a specific assignment, not an option. There is no "automatic minimum": Marks range from 0% to 100%, as with all other assignments. Effective participation means (a) active, (b) substantive, and (c) continuous (d) contribution. Occasional nonsubstantive comments or questions do not meet this requirement. Performance is assessed by the instructor based on each participant's contribution, which may take such forms as being prepared to discuss the assigned readings, raising or answering questions, offering comments, enriching the class with relevant items of interest from the media or personal experiences, taking part in brief in-class and/or take-home quizzes, cases, or other exercises, and overall effort throughout the term. To participate, one has to be in class; so, while there is no specific requirement for attendance, "being there" (or not) also affects the CC evaluation.

#### 2. Tests

Two in-class tests will help consolidate the knowledge that you acquire. They will consist mostly of objective and short essay questions and each will take about one-half of a class session.

#### 3.a. Annotated Bibliography (AB) and 3.b. Comprehensive Project (COMP)

- These are team projects, interrelated but independent of each other. The objective of the AB is to carry out a review of current research in a chosen area, and of the COMP to develop a marketing strategy for introducing a selected product in a selected foreign market. Each AB team will have 2-3 members (TBD based on class size), and each COMP team will consist of two AB teams. AB themes would normally be selected to provide background for the COMP.

Each of the AB and COMP requires a separate formal proposal and written final report. The COMPs will also be presented in class.

All of the component parts will form part of the total marks assigned to each project.

- The AB and COMP (proposals, reports, presentation deck) must be submitted both in hard copy and by email. All group members must be copied on all email submissions.
- Please see the Appendix for detailed guidelines on these two assignments.

## Summary of Assignments and Evaluation

Assignment	Session due	% of grade		
Mid-term Tests	Best of 2	5	13	20
	Other	9	7	
Annotated Bibliography	Proposal	3	3	20
	Written report	7	17	
Comprehensive Project	Proposal	3	4	40
	Presentation	11+12	14	
	Written report	12	22	
Class Contribution (as described in IV.1.)	throughout		20	20
Total				100

## Important Notes on Assignments and Evaluation

- a. All page limits specified in this outline, including the appendices, are “hard” and non-negotiable; in other words, aim for the upper limit in each case (e.g., a 1-page submission for an assignment with a 5-page limit will be judged as insufficient) but do not exceed it. Material beyond the stated limit will not be read and the remaining submission will be judged on its merits. For fairness and comparability, all take-home written work must be submitted typed, double-spaced, on letter-size paper, with 2.5 cm margins all-round, in Times-Roman 12 or Arial 11 or equivalent font.
- b. In addition to content, all written work will be graded for grammar, spelling, writing style, and organization and presentation of the material.
- c. Cheating, plagiarism, and other instructional offences are not tolerated and can have severe penalties. In group work, all group members are responsible jointly and severally for the integrity of the submitted work. Please see the University's statement on plagiarism in the attached sheet. For further help in these matters, you are strongly encouraged to consult:
  - The University policy, at <<https://carleton.ca/registrar/academic-integrity/>>; and
  - The document “Paper Formatting & Documentation Guidelines”, on the Sprott website, at: <https://sprott.carleton.ca/wp-content/files/paper-and-documentation-guidelines-NP.pdf>
- d. To help you do better at the tests, you may bring a single sheet of letter-sized paper with reminder notes on one side only, providing they can be read without magnification tools.
- e. The COMP presentations will be evaluated 50/50 by the class and the instructor.
- f. For the team assignments, I strongly encourage you to read and comply with the statement from the Sprott School of Business concerning group work, in the "Additional Information" section at the end of this outline, and to check with me for any questions you may have.
- g. Each student must submit, by the last session of the class, an independent evaluation of each team member's (including self) contribution to the COMP, on a form that I will supply. If the mean mark given a student by his/her colleagues is at considerable variance (lower or higher) from his/her marks for other class work (test, CC, AB), then his/her COMP mark will be adjusted accordingly.
- h. All assignments are normally marked and returned in-class one session after submission; if a student is absent when an assignment is returned, it will be available for pick-up until the end of classes during office hours. Assignments submitted during the last week of classes can be picked up until the end of the term by arrangement with the instructor.
- i. Supplemental and grade raising examinations are not available in this course.
- j. Deadline extensions will not be granted, late assignments will not be accepted, and missed tests, quizzes, etc. will not be rescheduled except for university-approved reasons (e.g., on medical grounds and with appropriate documentation as specified by the Registrar's office).
- k. The above evaluation plan may have to be changed if changing class conditions so warrant.

## V. CLASS SCHEDULE

The timing of topic coverage is approximate and this schedule may be modified depending on the level of interest in the subjects to be discussed (i.e. we may go "faster" or "slower" than indicated below). It is each participant's responsibility to keep up to date with the overall progress of the course as the term unfolds, and with any specific changes that may be announced from time to time.

Session	Theme	Text chapter		Readings (on reserve)	Assignments*
		Farrell	Cateora		
1	Course introduction and overview Introduction to international marketing	–	1	–	Form teams
2	Dynamics of the Global Environment Canada's Position in International Markets	1 –	2 3	– a, b, c	Know Basic Marketing
3	Elements of the International Environment	2-4	4-6	–	Proposals due
4	Understanding Foreign Markets & Buyers	6	7	–	*
5	World Markets and Opportunities	7, 14	8, 9	–	In-class test 1
6	Market Entry and Expansion Decisions	8	10	d	*
–	Study break	–	–	–	–
7	International strategy: Products & Brands	9	11	–	AB report due
8	International strategy: Distribution & Pricing	10, 11	12, 13	–	*
9	International strategy: Communications & International Negotiations	12 –	14 15	–	In-class test 2
10	Global Organization and Planning	13, 15	16, 17	–	*
11	Cases in International Expansion	–	–	–	Presentations
12	Cases in International Expansion	–	–	–	Presentations COMP report

\* Additional take-home or in-class work may be assigned as needed (see "Class Contribution").

## VI. OTHER

### 1. Email

- This course does not use centralized e-portals (e.g., cuLearn). All e-communication, including distribution of course materials to the class, submission of assignments indicated in this outline, etc., will be directly by email between the instructor, the TA, and the students.
- The Carleton email account must be used for all communications with the instructor and TA. My goal is to respond to emails within 48 hours during the working week.

### 2. Basic norms for this class

The attached document "Basic norms for this class: A call to action for learning and success through commitment" *is considered to be an integral part of this course outline.*

## A. ANNOTATED BIBLIOGRAPHY GUIDELINES

### 1. Purpose

This assignment focuses on the theory and research side of the course theme using **articles in academic journals** as the base. An AB goes beyond a simple listing of references – it also summarizes the main points of each article, to allow researchers to assess specific aspects of those that appear to be interesting and decide which may be worth reading in full. Developing an AB is one of the best ways to familiarize one's self with current knowledge in a selected area.

### 2. Selecting a Topic to Propose

Any topic is acceptable so long as it reflects a research, conceptual, or theoretical perspective on an international marketing issue. Examples of acceptable topics include "The Japanese Distribution System", "Marketing in Transitional Economies", "Firm Size Effects on Export Success", or "Modes of International Expansion". Topics that are too applied in orientation (e.g., "How to Sell Copiers to Japan") or not directly related to the theme of the course (e.g., "International Personnel Management") do not meet the criteria for this project.

### 3. Content

**3.1. AB proposal.** This must include enough information to enable the reader to assess the merit and feasibility of what is being proposed. It should include, at the least:

a. *Team member names and planned division of work.*

b. *Proposed topic and rationale.* Recall that the AB can be related to the COMP but is an independent assignment. Therefore, the rationale for the AB topic can **not** just be "it will help us with the COMP" – it must be primarily related to the AB topic itself, viewed on its own merits.

c. *A specific outline of information sources to be used.* Recall that, since it is you who proposes, once the proposal is accepted it becomes the "contract" for this assignment. Therefore, ensure you can deliver on your promise! Check the library to ensure there are enough suitable articles (see below) for your chosen theme, and do not just say "we will use journals X and Y" – specify two or three sample articles, to indicate that (a) you have understood the type of articles your topic requires and (b) there are enough articles of the kind you will need.

**3.2. AB report.** This must include the article annotations and a brief commentary; specifically:

a. *Articles.* Each AB must include three (3) academic articles per team member. Lengthy works such as books, and short journalistic-type articles from magazines, newspapers, the Web, etc., are not eligible. The articles must be *top-notch* and represent *current* thinking, published *within the last 10 years* unless they are "classics". To secure good entries you must identify a fair number of candidates, since some will not meet the quality criterion. Each annotation must include the purpose, method, and main findings/conclusions of the study being reported.

b. *Commentary.* The purpose of the commentary is to offer a brief critical overview of the research in the chosen field, based on the articles the team reviewed. You may address questions such as, but not limited to: How easy/difficult was it to locate (quality) articles? Why? Why is this topic attracting research interest? What main issues seem to be of interest within it? What schools of thought seem to prevail? What is the topic's importance to academics or practitioners? What methodological approaches do researchers favour? If one wants to research this topic more, which sources should one consult?

### 3.3. Suggested Sources for Articles (the list is not exhaustive)

- International journals: Journal of International Business Studies, International Business Review, International Marketing Review, Journal of International Marketing, Journal of Global Marketing, Journal of International Consumer Marketing, Journal of Euromarketing, European Journal of Marketing, Journal of World Business, Revue Française du Marketing, Management International Review, European Research, International Journal of Advertising
- Journals with some international content: Journal of Marketing, Journal of Marketing Research, International Journal of Research in Marketing, Journal of Consumer Research, Journal of Advertising, California Management Review, Harvard Business Review, Journal of Business Research, Canadian Journal of Administrative Sciences
- Conference proceedings: Admin. Sciences Association of Canada (International Business and/or Marketing divisions), European Marketing Academy, American Marketing Association, and the World Marketing Congress and/or the annual conference of the Academy of Marketing Science.
- Chapters in edited books: These are academic/research books that consist of chapters contributed by various different authors (i.e., each chapter authored by a different person[s]).

Note: As mentioned in 2(a) above, the following are **not eligible**: Articles from newspapers and magazines (e.g., Canadian Business, Report on Business, Marketing, National Post, Business Week, Fortune, Newsweek, Time, Advertising Age, South Asia Trade Review), the Web (except e-versions of journals such as those listed above), authored (instead of edited) books, and other such sources.

## 4. Format

This assignment has **very specific and strict format guidelines** intended to familiarize you with the reporting requirements of the kind that is the rule in business. Specifically:

**4.1. AB Proposal.** Length up to two (2) pages, all inclusive.

**4.2. AB Report.** The following specifications must be observed:

- a. The write-up for each article must include:
  - The full reference (author's name, title, source, date, page numbers) in proper bibliographic form. Any style will do (e.g., Turabian, Chicago, APA) so long as it is used consistently for all articles. For help with this, see the Paper Formatting & Documentation Guidelines mentioned in "Important Notes on Evaluation" in the main part of this outline.
  - The annotation, which must be a maximum of two (2) paragraphs long, with each paragraph between a minimum of five (5) and a maximum of ten (10) lines long.
  - A photocopy of the front page of each submitted article, appended at the end of the report.
- b. The commentary must be between a minimum of three (3) and a maximum of five (5) pages long.
- c. Paragraphs, annotations, and commentaries shorter than the minimum specifications in (a) and (b) above will be considered as "not submitted" and will not be read at all. Conversely, in those exceeding the maximum length (i.e., annotations with 3+ paragraphs or with a paragraph(s) having 11+ lines, and/or commentaries with 6+ pages), the excess content will not be read and the remainder will be considered on its merits regardless of what is missing.

Reminder: The AB proposal and report must be submitted both in hard copy and by email.

## B. COMPREHENSIVE PROJECT GUIDELINES

### 1. Purpose

This assignment focuses on the applied side of the course theme. The COMP makes it possible to familiarize one's self with strategic planning and decision making in international marketing and with the applied information sources that are available to managers in international marketing. The project must focus on the practical application of the concepts learned in the course (e.g., using international market selection theory to guide actual target country choice).

### 2. Topic Selection and Proposal

Any Canadian product/company may be selected (e.g., industrial/consumer, tangible/intangible, product/idea/person/place), whether it already exists (much preferred, and ideally with the cooperation of its producer) or is fictitious. The target market may be any foreign country, sub- or supra-national region, or even "the world" (note: the "home" market of international students needs special permission). A product-market combination will be acceptable so long as a convincing case can be made about it. As with the AB, since you are the proposer, once the proposal is accepted it becomes the "contract" for the COMP – therefore, ensure you choose a feasible project! Select a product and market that are of interest to you, lend themselves to applied research, and fit each other. For example, *Brand X Snow Shovels to Sweden*, *Bryan Adams to EU*, *Dollarama to Brazil*, or *Family Planning to Egypt*, meet these criteria. *Mining Equipment to PRC* and *Photographic Paper to Senegal* do not (product too complex or market too small, relative lack of published information, etc.).

### 3. Research

This project requires considerable legwork, creativity, and know-how. A good understanding of the chosen product and market is essential, and effective team work is a must. Assigning specific duties to each team member beforehand, and specifying deadlines for interim stages, can help greatly in making the project a success. (Reminder: See the Sprott School guidelines concerning "group work", in the "Additional Information" section below.) Unlike the AB, research for the COMP will focus on applied information plus any relevant insights from the AB itself.

Secondary research is a cornerstone of success for this project. We are fortunate in Ottawa to have access to ample information for international marketing, including standard library sources (e.g. magazines, books, UN, EU, IMF, WTO, etc. publications); government departments (e.g. foreign affairs, industry), embassies, international and trade organizations, and so on. Feel free to use information from the Web, but be mindful to (a) not let the medium obscure the message (posted information often is of dubious quality; you are responsible for assessing the credibility of what you use); and, (b) not drown your target reader and yourselves in useless information (e.g., a list of 247 Web hits does not prove that one has done "research").

### 4. Content, Organization, and Approach

**4.1. COMP proposal.** As with the AB, this must include enough information to enable the reader to assess the merits of the proposed project. Typically, it will specify the team members' names and duties, whom the team represents (e.g. management, consultants), product-market choice and rationale, relationship to the associated AB projects, and timetable, and include an outline of the intended approach, specific information sources (in addition to AB), and expected results.

**4.2. COMP project.** As with any similar task, this should begin with gathering and analyzing information and proceed to setting objectives, establishing criteria and evaluating alternatives, and

recommendations. The final report should include an Executive Summary, Table of Contents, References, and, normally, the following main sections (this list is only indicative and intended to help – the exact topics, and their sequence, should be chosen by you, depending on the nature of the project and by drawing on what you have learned so far as a business student):

- a. Introduction (product description, company background, problem statement, etc.)
- b. Rationale for selecting the chosen country and analysis of the country (environment, opportunities and threats, market, buyer characteristics)
- c. Organizational and/or product objectives, limitations, criteria
- d. Selection of and rationale for chosen mode of entry into the target country
- e. Segmentation within the chosen country, target market selection
- f. Marketing mix (alternatives, strategies, and tactics for each element of the mix)
- g. Action plan, timetable, budget (how/when/at what cost/etc. will strategy be implemented)

## 5. Format

Unlike the AB, the formatting requirements for the COMP are simple: The proposal should be up to four (4) pages long, all inclusive. There is no length limitation for the final project report itself (but avoid excessively lengthy appendices with information of marginal value).

## 6. Presentation

About 20'-30' will be available for each COMP presentation (exact length TBD depending on class size), including 5'-10' for questions and discussion. The presentation should be designed so as to highlight the elements of the project and need not be structured to match the written report. The presentation format leaves considerable room for creativity, within reason. AV aids enhance the effectiveness of presentations and help make optimal use of time (e.g. a full table or chart can be shown while you discuss only one part of it). Therefore, the use of AV aids is required and each team is responsible for ensuring the availability of its chosen equipment. Multi-media presentations are encouraged, but (a) do not let the technology cloud the substance, and (b) ensure you have backups for the eventuality of equipment failure.

Reminder: The COMP proposal, report, and presentation deck must be submitted both in hard copy and by email.

### C. RELATING THE ANNOTATED BIBLIOGRAPHY TO THE PROJECT

Since "there is no better practice than a good theory", choosing AB topics that can (and should) be used as theoretical background for the COMP will help: The ABs provide useful know-how for the COMP, and the COMP helps to show how practical theory can be. To find good topics, ask such questions as: What are the unique underlying characteristics and/or component parts of the COMP topic? What theoretical knowledge might be available that would help a manager develop marketing strategy? Following are five examples:

COMP topic	AB topic 1	AB topic 2
Hotel chain in the PRC	International marketing of services	Marketing characteristics of centrally-planned economies
Selecting the best SE Asian market for office copiers	International market selection and/or segmentation	International industrial marketing
Second Cup to Russia	East-West joint ventures	International franchising
B&D Workmate to the EU	Cross-national segmentation	Marketing in the EU
Canadian tourism to France	Factors affecting consumers' choices of tourism destinations	Canada's international image



**BASIC NORMS FOR THIS CLASS:  
A CALL TO ACTION FOR LEARNING AND SUCCESS THROUGH COMMITMENT**

*You are investing a lot of time, energy, and money in your education. Your chances of earning a potential return on your investment in each course end when each course does.*

*Learning and success in your education requires your active commitment to it. You will be successful in this course if during class and homework times you are prepared to engage in and commit to the learning process. I am prepared to do everything I can to help you.*

<b>My Commitment</b>	<b>Your Commitment</b>
<ul style="list-style-type: none"> <li>• Prepare a learning environment for each class.</li> </ul>	<ul style="list-style-type: none"> <li>• Come to all classes prepared and be ready to learn and participate.</li> </ul>
<ul style="list-style-type: none"> <li>• Start and finish on time, provide a break. Be in class in body and soul throughout.</li> </ul>	<ul style="list-style-type: none"> <li>• Attend each class in full, attend all classes, and be there in body and soul throughout. Missing classes and/or arriving late or leaving early, except for emergencies and with notification, is rude to the class and disruptive of the learning environment.</li> </ul>
<ul style="list-style-type: none"> <li>• Cellphone on “silent” (the instructor's cell must be “on” for Carleton’s emergency notification system).</li> </ul>	<ul style="list-style-type: none"> <li>• Cell phone ringers always "off". Wireless devices used only for class activities as specified by the instructor. Inappropriate use will affect your contribution marks.</li> </ul>
<ul style="list-style-type: none"> <li>• Solicit and encourage participation.</li> </ul>	<ul style="list-style-type: none"> <li>• Contribute constructively, presenting own ideas and critiquing those of others.</li> </ul>
<ul style="list-style-type: none"> <li>• Present opportunities to learn new ideas.</li> </ul>	<ul style="list-style-type: none"> <li>• Strive to learn, seek clarification, and ask questions.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide opportunities to apply new learning.</li> </ul>	<ul style="list-style-type: none"> <li>• Think about how to apply new learning to examples given and share with class.</li> </ul>
<ul style="list-style-type: none"> <li>• Keep up-to-date with theory and practice and link course material to current events.</li> </ul>	<ul style="list-style-type: none"> <li>• Make an effort to track what’s happening in your profession.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide assistance and opportunities to consult during class breaks, during office hours, by email, and at other times as required subject to availability.</li> </ul>	<ul style="list-style-type: none"> <li>• Seek assistance as issues arise. Do not expect instant email feedback, and consider your colleagues – the instructor deals with many students.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide appropriate guidelines for, and timely feedback on, assignments.</li> </ul>	<ul style="list-style-type: none"> <li>• Follow instructions. Hand assignments in on time, learn from feedback.</li> </ul>
<ul style="list-style-type: none"> <li>• Treat all course participants as responsible professionals, and act with civility and professionalism at all times.</li> </ul>	<ul style="list-style-type: none"> <li>• Treat all course participants as responsible professionals, and act with civility and professionalism at all times.</li> </ul>

original by Dr. L.A. Heslop; adjusted by NP at various times, most recently on 13/10/2017.

[This section is added by the Sprott School of Business]

## ADDITIONAL INFORMATION

### Course Sharing Websites

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).

### Required calculator in BUSI course examinations

If you are purchasing a calculator, we recommend any one of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

### 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.

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			

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

### 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 Accommodations

*For Students with Disabilities:*

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or [pmc@carleton.ca](mailto:pmc@carleton.ca) for a formal evaluation. If you are already registered with the PMC, contact your PMC coordinator to send me your **Letter of Accommodation** at the beginning of the term, and no later than two weeks before the first in-class scheduled test or exam requiring accommodation (*if applicable*). **Requests made within two weeks will be reviewed on a case-by-case basis.** After requesting accommodation from PMC, meet with me

to ensure accommodation arrangements are made. Please consult the PMC website ([www.carleton.ca/pmc](http://www.carleton.ca/pmc)) for the deadline to request accommodations for the formally-scheduled exam (if applicable).

#### *For Religious Obligations:*

Students requesting academic accommodation on the basis of religious obligation should make a formal, written request to their instructors for alternate dates and/or means of satisfying academic requirements. Such requests should be made during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist, but no later than two weeks before the compulsory event.

Accommodation is to be worked out directly and on an individual basis between the student and the instructor(s) involved. Instructors will make accommodations in a way that avoids academic disadvantage to the student.

Students and instructors can confirm accommodation eligibility of a religious event or practice by referring to the Equity Services website (<http://carleton.ca/equity/accommodation/religious-observances/>) for a list of holy days and Carleton's Academic Accommodation policies. If there are any questions on the part of the student or instructor, they can be directed to an Equity Services Advisor in the Equity Services Department for assistance.

#### *For Pregnancy:*

Pregnant students requiring academic accommodations are encouraged to contact an Equity Advisor in Equity Services to complete a letter of accommodation. The student must then make an appointment to discuss her needs with the instructor at least two weeks prior to the first academic event in which it is anticipated the accommodation will be required.

#### **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 on 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/>

#### **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](http://carleton.ca/csas).

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**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, in order to respond to your inquiries, please send all email from your Carleton CMail 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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**Important Dates and Deadlines – Winter 2018**  
**Graduate, Undergraduate and Special Students**

**January 2**

University reopens at 8:30 a.m.

**January 8**

Winter term classes begin.

**January 12**

OSAP deferral deadline. [Late payment charges and late registration charges](#) applied to the student account on or after this date for eligible OSAP students.

**January 19**

Last day for registration for winter term courses.

Last day to change courses or sections (including auditing) for winter term courses.

Graduate students who have not electronically submitted their final thesis copy to the Faculty of Graduate and Postdoctoral Affairs will not be eligible to graduate in Winter 2018 and must register for the Winter 2018 term.

**January 19-21, 26-28**

Fall-term deferred examinations will be held.

**January 31**

Last day for a [fee adjustment](#) when withdrawing from Winter term courses or the Winter portion of two-term courses (financial withdrawal). Withdrawals after this date will create no financial change to Winter term fees and will result in a grade(s) of WDN appearing on your official transcript.

**February 16**

April examination schedule available online.

**February 19**

Statutory holiday, University closed.

**February 19-23**

Winter Break. Classes are suspended.

**March 1**

Last day for receipt of applications from potential spring (June) graduates.

Last day for receipt of applications for admission to an undergraduate program for the summer term.

**March 9**

Last day to request formal exam accommodations for April examinations to the Paul Menton Centre for Students with Disabilities. Late requests will be considered on case-by-case basis.

**Date TBA**

[Last day to pay any remaining balance on your Student Account](#) to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents. An account balance may delay Summer 2018 course selection.

**March 27**

Last day for summative or final examinations in winter term or fall/winter courses before the official examination period (see [Examination Regulations](#) in the Academic Regulations of the University section of the Undergraduate Calendar).

**March 30**

Statutory holiday, University closed.

**April 7**

[Last day to pay any remaining balance on your Student Account](#) to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents.

**April 11**

Winter term ends.

Last day of fall/winter and winter-term classes.

Classes follow a Friday schedule

Last day for academic withdrawal from fall/winter and winter term courses.

Last day for handing in term work and the last day that can be specified by a course instructor as a due date for term work for fall/winter and winter-term courses.

**April 12-13**

No classes or examinations take place.

**April 14-26**

Final examinations in winter term and fall/winter courses may be held. Examinations are normally held all 7 days of the week.

**April 26**

All take home examinations are due on this day.

**May 11**

Graduate students who have not electronically submitted their final thesis copy to the Faculty of Graduate and Postdoctoral Affairs will not be eligible to graduate in Spring 2018 and must register for the Summer 2018 term.

**May 18-29**

Fall/winter and winter term deferred final examinations will be held.