



BUSI 4708 A
International Expansion & Operations Fall 2017

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Course meets: Tuesdays 7:05 pm – 9:55 pm

Pre-requisites & precluded Courses: Fourth year standing in B.Comm or B.I.B., and BUSI 2702 or BUSI 3703.

Course Calendar description from the 2017/2018 University calendar:

Internationalization process. Methods of international expansion including exporting, greenfield investment, acquisition, joint venture, and licensing. Theories of international market selection, investment location, and market service.

Course Description

Canada remains an open, resource-based economy and it is also now recognized as an emerging leader in the information and communication technology sector. However, despite the progress made at diversifying Canada's industrial base, little progress has been made in diversifying Canada's export market base since approximately 85% of Canada's exports still go south of the border (USA). Moreover, international expansion of Canadian businesses requires improvement; less than 1% of all Canadian businesses are considered large businesses (more than 500 employees). Innovation from a product or service standpoint are required, but also innovation from a marketing standpoint to help develop strong branding (globally) and also sell Canadian products and services, so to grow and into greater companies and progress to multi-national levels that is sustainable over time.

Also, networked marketplace where R&D, production, distribution, and marketing activities of firms are increasingly becoming globally dispersed, supply chains are also becoming globalized. Strategic alliances, joint ventures, partnerships and a variety of collaborative and network relationships seem to be the new organizational form of choice by many corporations to compete internationally.

At the same time, ICT (information and communication) technologies have made it possible for SMEs (small-to-medium enterprises) to become serious players in the global marketplace. In summary, there are great opportunities for smaller Canadian businesses for international expansion, but they must first understand and overcome the challenges of marketing, selling, and operating internationally.

A rigorous review of International Expansion and the Operations behind Canadian businesses – but also International Marketing to create the necessary brand awareness and brand equity for businesses in different markets – there is a great opportunity to better understand the global environment as well as the opportunities and challenges facing Canadian businesses in the modern global economy.

Using this knowledge, students will evaluate how Canadian firms (and occasionally companies from other countries) with their unique characteristics can design and implement business expansion and marketing strategies for goods and services across multiple regions and markets – each with their distinctive cultural, economic, technological, political and legal environments. The point of view is always that of an International CEO, Global Marketing and/or Sales Director or Global Senior Manager who drives the organization's international expansion, marketing strategies and tactics, but also who must direct, make decisions, (which are financially beneficial), and take action to ensure leadership in the new global economy.

Course Objectives

Upon completion of this course, each participant should be able to:

1. Develop a deep and critical understanding of business expansion considering the cultural, economic, technological, political and legal environment of various international markets.
2. Demonstrate a nuanced understanding of the differences among international markets as well as specific market segments within specific international markets.
3. Demonstrate a critical understanding of the role of technologies, international marketing expansion and operating strategies in shaping international expansion opportunities, work with expansion challenges, and implementing sustainable firms' strategies.
4. Apply international expansion, marketing and operation concepts and strategies to study the experience of an actual and existing Canadian company that expand and market internationally as a practical learning exercise.

Course Structure

This course emphasizes a way of thinking about expanding business, operating in new and emerging markets and marketing on the international scale; but also, to essentially make effective financial business decisions through the use of paired reflection exercises regarding current and relevant international news topics, a team led presentation and accompanying report, relevant strategic management discussions, and a review of all concepts through a Final Exam.

Moreover, the overall structure also calls for ongoing class participation throughout the entire course, so to best leverage the knowledge of concepts from all participants and integrate it to the application of expanding, operating and marketing at all levels for companies and organizations seeking leadership in growing their business internationally.

Required Material

To be determined

Course Policies and Course Outline

See Page 10 and Page 11 for both the course policies and the detailed weekly course outline, including deliverable projects, key dates, reading schedule and other key scheduling points.

Methods Used to Evaluate Student Performance

Student assessment involves both individual and team components and requires students to use both classroom and field learning from readings, case studies and a consultation project. Specifically, the assessments are:

Individual Participation

10%

The course will be seminar based and will revolve around a number of exercises and case, some of which do not require submitted papers. Therefore, participation for class is critical and participation will be self-assessed.

Dual Application Exercises

15%

See course outline for dates

Team Presentation and Team Final Report

35%

Due November 21st (Presentation) and December 5th (Final Report)

Final Exam

40%

Follows regular exam schedule

Teams and Pairs

Teams will be formed of a 3 to 4 people (based on the final enrollment of the class) and will be grouped at the first class. Also, pairs will be formed at the first class. Each team and pair must designate a person to coordinate the delivery of projects, as well as providing both a final printed and an emailed copy (see due dates in course outline).

NOTE: You are responsible for managing your teams (for the International Expansion and Operations Consultation Project) and/or pair (for the Dual Application Exercise), including highlighting opportunities for the team and/or pair to improve and to continuously offer recommendations for the team to work effectively and efficiently together. If teams and/or pairs have serious differences, then it required to show the Professor a detailed record of performance problems (i.e. emails, a file describing the problem, detailed challenges, detailed missed meetings, etc). I ask this of you, since this is in line with the human resources management of a modern company or organization. No more or no less.

Each student will have the option to submit a *Peer Evaluation Form* (See APPENDIX #3 *Peer Evaluation Form* on CU Learn) of their group members' contribution and also performance throughout the entire process including each key Project Milestone.

Individual Participation

Managers, Directors and CEOs working in marketing, international business expansion, sales strategies and so on, must work in teams, present and must always be active participants in all aspects of the business. The same important principle (participation) applies to this course. The lectures are designed to be very interactive, so opportunities for class participation are at each class. In addition, countless opportunities for contribution and/or participation will also be available during the case study discussions, following team presentations and during brainstorm/team workshops throughout all classes.

Participation will be self-assessed each week starting the second session. The evaluation will consist of three key questions:

1. Preparation
2. Class participation
3. Qualitative assessment of your classroom interventions (4 questions after each class)

To help you evaluate your quality of your participation in class, a grid is proposed below. **Note: The Professor of this course reserves the right to change your score if I judge that your review does not match my (and/or your peers) perception and actual reality of your contribution in the course. Should this occur, the Professor will communicate the change of your score to you by email.**

Value: 10% of total course grade.

Recommended Individual Participation Self-Evaluation Grid

NOTE: The following is a criteria assessment guide, which is to help for providing a self-evaluation for each class through the self-assessment process:

5/5 Excellent

Student participation demonstrates serious preparation. The student has excellent skills in terms of expressing his/her ideas as well as active listening. Regular value-added ideas shared with the group. The student encourages group discussion. Always offers new ways of thinking to better the overall group's strategic ideas. Most important, if this person was absent from class, the class would surely miss out, and discussions would be far less dynamic. Attends and participates in a meaningful way with relevant, useful questions and discussions at all "Presentation of a Business Model" Individual Presentations, for which they are not presenting.

4/5 Very good

Ideas shared are relevant and often pushes discussions in the right direction. The student's opinion is well argued and defended. Arguments are always consistent. The student is a key drive to class discussion. The student is an important person to the group's discussion. Most important, if this person was absent from class, the class would surely miss out, and discussions would be less dynamic. Attends and actively participates in all "Presentation of a Business Model" Individual Presentations, for which they are not presenting.

3/5 Good

Students ideas are shared with the class are often relevant, but generally do you not guide discussions to new paths or to help present new ideas. Arguments are sometimes coherent and structured. This person is a positive element to the class. Attends most of the “Presentation of a Business Model” Individual Presentations for which they are not presenting.

2/5 Non-participant

No participation. The student is not prepared and/or does not share ideas in the class. Does not attend the Team and/or Dual Application Exercise Presentations for which they are not presenting.

1/5 Non-satisfactory

Might provide conversation or dialogue, but the ideas are rarely relevant. The student’s arguments are not coherent, and the dialogue is often disruptive to the class. The participation does not help guide the discussion in an effective direction or to be beneficial to the class. Does not attend the Team and/or Dual Application Exercise Presentations for which they are not presenting.

0/5 absent; unjustified

In the News Dual Reflection Exercises

Students in pairs (of two) will make a concise (*maximum 8 minutes excluding questions from the audience*), exclusive of questions and answers, in-class presentation (PowerPoint or Prezi) regarding a *relevant* international business story that was reported in the news for that week (i.e. the West’s imposition of economic sanctions against a particular country, Starbucks eventual expansion to Italy after years of being in every other Western European country, etc.), and more importantly, how that story affects a particular company’s strategy regarding expansion, operations and marketing overseas.

NOTE: Pairs of two who are presenting in the same class are expected to coordinate their selection of news items to ensure that each pair of presenters has a unique news story.

Every presentation must make appropriate references to the textbook’s discussion of this topic.

Dates of the presentations will be decided the 2nd week, and who will be presenting accordingly with their respective dates posted shortly after the 2nd week on CU Learn.

Moreover, content must be presented considering international business, expansion, but most importantly international marketing expansion and sustainable operation strategies. These exercises provide the opportunity to practice strategic factors, recognize emerging strategies in international marketing and analyze cultural differences in management and business.

See CU Learn for SAMPLE of GRADING RUBRIC, which includes the recommended presentation outline, format and also the evaluation criteria for the dual in the news reflection exercises.

Value: 15% of total course grade.

Final Team Written Report and Presentation: A Consultation Project of a Canadian Business Expansion in an Emerging Country

Congratulations! Your team has been approached to provide strategic and detailed consultation for an actual Canadian based company seeking to expand internationally.

This team based assignment includes both a team written report as well as a team presentation. More specifically each team should encompass an international marketing expansion and operations plan for a product or service aimed at the consumer market that an actual Canadian firm (small, medium or large), can launch in an emerging country. For this, teams are to act as international expansion consultants for a Canadian firm that operates (or is capable of operating) in the international field. The completed report should be developed with the assumption that it is being delivered to the company's CEO, Global Marketing and/or Sales Director, or the company's Board of Directors.

Students are required to identify a suitable business **and this process should begin as soon as is possible after the course start dates**. The project proposal **is due at the beginning of class September 26th** (See *Project Milestones #1*).

Students will analyze and develop international expansion and operations strategies that will allow a business to expand and grow internationally, gain global market leadership, and most importantly be sustainable over a long period of time on an international scale. This should also include the financial implications of the recommended strategies.

LEARNING OBJECTIVES:

The primary learning objective of this team project is to apply knowledge of theories, concepts and practical international expansion and operations application techniques to analyse the experience of a company that is engaged in international expansion and operations as well as international marketing.

The secondary learning objectives of this exercise is to provide the opportunity to develop: (1) research skills by undertaking research and data collection, (2) analytical skills by learning to analyse and interpret the data collected, (3) writing skills by preparing a written case report, and (4) communication skills by presenting the final report and (5) strategic thinking development in applying practical, sound recommendations that can truly be implemented for a company looking to expand internationally.

PROJECT MILESTONES:

The following are the PROJECT MILESTONES:

Timeline:

<u>Step</u>	<u>Objective</u>	<u>Due Date</u>
Step #1:	Project Proposal	September 26 th
Step #2:	Primary Research	Interview by Fall Break/ Reading Week
Step #3:	Team Presentations	See Course Outline for Specific Dates
Step #4:	Final Team Written Report	Beginning of class, December 5 th

STEP #1. Project Selection and Project Proposal:

The final selection of the company or organization of choice for the International Expansion Consultancy project is **due Tuesday, September 26th at the beginning of class.**

The following outlines the requirements for the Project Proposal:

This proposal is not graded but it must be approved before moving to step 2. It is a brief, but also detailed and concise 1-page report or less (point format) highlighting the following:

- a) Briefly describe the international expansion assignment, and why you selected the company for which you will provide international expansion, operations and marketing consultation.
- b) Recommended Primary and Secondary Research sources.
- c) Challenges the team company / organization is currently facing from an international expansion, operations and/or marketing expansion consultation.

STEP #2. Project Primary and Secondary Research Requirements: This is a research assignment. You must conduct both secondary research AND primary research (i.e. interview at least one Manager, Owner, Entrepreneur, Human Resources Director and/or Marketing and Sales Director, and include their coordinates – name, tel#, email -- in the reference section).

Project Primary Research: INTERVIEW

Strategic international expansion, operations and marketing recommendations must incorporate and be based from findings from the secondary research, **but also primary research findings.** Therefore, regarding primary research, teams *must conduct at least one interview with at least one manager, human resources manager, owner or CEO of the company / organization to truly understand the international expansion challenges the company / organization is facing and also to better identify the opportunities.* The interview must be documented (i.e. interview notes) and also included in the appendices in the Final Written International Expansion and Operations Consultation Report.

It is strongly recommended that the primary research **interview to occur by the 3rd week of October and/or before Reading Week (if not earlier)** to allow sufficient time to base the strategic recommendations from the learning of the primary research. The interview is meant to help with many of the team's business review, expansion and operation strategies.

STEP #3. TEAM PRESENTATIONS: Once again, the recommendations must be strategic for the company / organization and reflect learning from the course lectures, discussions and textbook and also must reflect the learning from the interview / primary research. Both elements create the most strategic and relevant, but also most applicable international expansion, operation and marketing recommendations for the company / organization that the manager, entrepreneur, or CEO can actually implement.

It is strongly recommended to work on the Group Presentation and Report throughout the semester and continuously build on the recommendations as the course progresses so the primary research is more relevant and links back to the course learning.

Presentation content must always consider strategies related to the growing Canadian business selected. Moreover, content must also always reflect international expansion, operations, marketing, sales management, online marketing and employee management strategies – considering international expansion at all times.

These exercises also give students the opportunity to practice strategic factors, recognize emerging strategies and analyze web business for growing businesses and organizations. Presentations will occur on **Tuesday, November 21st** and will be a maximum of 15 minutes (excluding questions from the audience), with each team member given the opportunity to present at least one slide. All presenting teams must bring a copy of their power point slides to their presentation.

NOTE: See ***APPENDIX #2 SAMPLE of GRADING RUBRIC and RECOMMENDED FORMAT*** on CU Learn which includes the recommended format, outline, time allocation of the presentation (by percentage) for each section, and also the evaluation criteria for team presentations.

Value: 15% of total course grade.

STEP #4. FINAL INTERNATIONAL EXPANSION CONSULTATION REPORT.

Once again, based on feedback from the Team Presentation, teams are to submit both a printed report and an emailed version of the same report to the Professor before or at the beginning of the class on Tuesday, December 5th.

Final Team Written Report:

The completed report should be no longer than 5,000 words (excluding appendices) and is **due at the beginning of class on Tuesday, December 5th**.

KEY NOTES regarding the Final Written Report:

1. Only the content within 5,000 words will be read and will be included as a part of the evaluation of the report. Any additional content (more than 5,000 words) will not be read and cannot be included as a part of the evaluation of the report.
2. *Teams are expected to incorporate the learning from the questions from the audience and Professor from the Team Presentation and adapt the Final Report accordingly.* The report must be submitted to the Professor at the beginning of the class on Tuesday, December 5th.
3. **An email version must also be sent** to the Professor by the due date of the printed version.
4. **Once again, see Appendix #2 SAMPLE OF A GRADING RUBRIC on CU Learn which includes the recommended outline, format and also the evaluation criteria for team report submissions for this course.**

Value: 20% of total course grade.

Final Exam

The objective of the Final Exam is to provide the opportunity to apply individual student's level of comprehension of the course material and their ability to apply the acquired knowledge to solving problems or issues in international expansion, marketing, operations.

The Final Exam is based on readings, case studies, lectures, videos, team presentations and all other course material covered in class. The Final Exam will consist of a combination of multiple-choice, very brief response questions and case studies.

Value: 40% of total course grade.

NOTE: PLEASE REVIEW the following COURSE POLICIES, the detailed COURSE OUTLINE and ADDITIONAL INFORMATION.

COURSE POLICIES:

The standards of professionalism always apply.

E-mail guidelines:

- Account: Always use your university account. E-mail from other domains (gmail, hotmail, yahoo...) may be automatically treated as spam. **Only e-mails from a Carleton University e-mail address accounts are guaranteed to receive a response.**
- Text Field: When communicating via e-mail, try to keep things as simple and clean as possible, but also specific and detailed.
- Response Time: Emails will be responded during business days (Monday – Friday) and please assume at least 24 hours to hear back. Therefore, it is always best to e-mail far in advance with questions /comments. **There is no guarantee for an immediate response to an e-mail which was sent the day before a class or the day before the due date for a paper submission.**

Late submissions:

- Policy is 10% per day (starting immediately after the beginning of the class of the submission date) deduction late. *NOTE: Reports submitted at the end of the class are also considered submitted as late.* Students can then e-mail their report to the Professor and the policy will be applied at the time of the email. Students must also submit a printed version.

Request for deferrals:

- Requests for a deferral for a Final Exam due to medical reasons or due to a scheduling conflict must go directly to the Registrar's Office and request a deferral.

Please note that it is not possible to submit extra course work to improve your mark.

SEE THE DETAILED COURSE OUTLINE on the FOLLOWING PAGE

COURSE SCHEDULE: BUSI 4708 A International Expansion and Operations Fall 2017
Tuesdays 7:00pm – 9:55pm

<u>Date</u>	<u>Lecture Themes & Issues</u>	<u>Relevant Article Readings</u>	<u>Assignments</u>
September 12	Scope and Challenges to International Expansion – Part I	Course Outline	Review Course Outline; Teams
September 19	Scope and Challenges to International Expansion – Part II	Chapters 1 & 2	Participation #1
September 26	Globalizations and Emerging Markets Canada and the Business World Discussion: Does “Made in Canada” Matter?	Chapters 3	Participation #2 DUE: Team Project Proposal
October 3	The Environment of International Markets Assessing International Marketing Opportunities	Chapters 3 & 4	DUAL ASSIGNMENTS Participation #3
October 10	Managing Risk with International Expansion	Chapter 5	Participation #4
October 17	Identifying Target Business Expansion Markets	Chapter 6	DUAL ASSIGNMENTS Participation #5

October 24	Fall Break/Reading Week	N/A	N/A
October 31	Strategies for the Base Pyramid	Chapters 6 & 7	Participation #6
November 7	Multinationals Based in Emerging Markets	Chapters 6 & 7	DUAL ASSIGNMENTS Participation #7
November 14	Communications, Media and Advertising – Part I	Chapters 8 & 9	DUAL ASSIGNMENTS Participation #8
November 21	Communications, Media and Advertising – Part II	Chapters 8 & 9	Participation #9 TEAM PRESENTATIONS
November 28	Leadership and Management in International Expansion and Operations	Lecture Slides	Participation #10
December 5	The Future of International Expansion Opportunities and Sustainability	Lecture Slides	Participation #11 DUE: FINAL TEAM WRITTEN REPORT Printed AND emailed version

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 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) 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: <http://carleton.ca/studentaffairs/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.

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/>