



## IBUS 5713 A

### Doing Business in the United States

Fall 2019

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#### ***Course Purpose & Objectives***

1. To achieve an appreciation of the strategic, legal, financial, operational and organizational problems faced by managers engaged in doing business in the United States;
2. To enhance decision-making and problem-solving skills related to a company entering the United States or conducting business with buyers in the United States; and
3. To develop an awareness for key success factors for managing Canada-US business relations.

#### ***Course Contribution to Development of a General Management Perspective***

Multinational Management courses are taught from a general manager's perspective. Selected cases help one develop an understanding of the challenges that senior executives encounter when formulating and implementing international growth strategies.

#### ***Course Contribution to Application of Critical Thinking***

The case method is the main instructional tool used to develop analytical and problem-solving skills. The kinds of decisions covered in class require students to use risk identification, assessment and mitigation strategies to minimize the likelihood of making bad decisions.



### ***Course Description***

The role of the United States as Canada's most important foreign trade partner. The U.S. as a distinct business environment. Regulatory structures, competitive environment, buyer behaviour and business culture in the U.S. and Canada.

Prerequisite(s): [IBUS 5701](#).

### **COURSE OVERVIEW**

Canada-US trade and investment relations are subject to many competing environmental and political forces. Within the last few years, the pendulum has swung from substantial economic gains under free trade and globalization to growing support across the United States for greater trade protection for US workers, industries and communities hit hard by the recent global recession.

To cover the broad range of issues that currently face Canadians doing business with the United States, the course will introduce a couple of industry experts from national and local industry associations as well as private sector firms to address some of these issues and share their own experiences.

In addition, cases involving Canadian firms doing business with the United States will be examined in class to provide “real learning through doing” and to illustrate different situations to support learning. In this way, the classroom becomes a laboratory where one can test their decision-making and communication skills.

To be an effective learning process, each student **must come to class** prepared to discuss each case. Prompt and reliable attendance and careful preparation are essential.

Each student’s contribution in class should:

- improve the class understanding;
- build on previous analysis and commentary;
- understand the comments of others;
- add value to class discussions; and
- respect the views and contributions of others

Cases **must be submitted** at the beginning of each class and must answer the questions in detail. During class students will be required to discuss, defend and elaborate on their decisions and conclusions. There is more than one good approach to a particular case analysis. If one’s approach differs from that in class, it is not necessarily wrong. When assessing their analysis, students should consider:

- If their arguments are logically consistent
- If they are using relevant concepts appropriately
- If they have failed to consider a major factor in the case
- If they have placed the wrong emphasis on a particular issue in the case

## BUSINESS CASES

Whenever possible, business cases involving Canadian companies have been used.

## COURSE SCHEDULE

The schedule may be modified so it is your responsibility to keep up-to-date with any changes that might be announced in class. As well, the availability of speakers may vary.

<b>Date</b>	<b>Theme</b>	<b>Guest Speakers</b>	<b>Cases &amp; Assignments</b>
Sept 12	Canada-US Economic Relationship as well as differences and similarities in culture and environment	Review course schedule, select groups, discuss case and class preparation expectations.	<b><u>Tim Horton's</u></b> case for discussion (will be posted in advance)
Sept 19	Financing Issues and complications when exporting or establishing a business in the US	<b>Guest Speaker - TBD</b>	<b><u>Foxy Originals – Expansion into the US</u></b> case is due at start of class Overview, in-class presentations and discussion
Sept 26	Market Research and company preparedness for doing business in the US	<b>Guest Speaker -TBD</b>	<b><u>Frogbox</u></b> case is due at the beginning of class
Oct 3	US Market Access Issues – strategy, competition, channels	<b>Guest Speaker - TBD</b>	<b><u>Henry Birks &amp; Sons</u></b> case is due at start of class
Oct 10	Exporting Canadian technology to USA		<b><u>Currie Road Construction Company</u></b> case is due at the start of class
Oct 17	Government trade promotion for exports to USA		<b><u>Team project</u></b> is due at start of class Presentations – during class.
Oct 28	Final Exam	<b>Final Exam – due by 11:59 pm Oct 28th (submit electronic copy). Hard copy due Tues Oct. 30th. Drop box will be used in DT810 8:30-4:30 pm.</b>	<b><u>Take Home Final Exam due by Oct 28<sup>th</sup> 11:59 pm</u></b>

**Note:** Cases can be downloaded from library or online

## READINGS

Students are expected to have reviewed the assigned readings and websites prior to class. These materials will assist you in your project research. All materials are available online and can be found on the following pages of the course outline. Some guest speakers will provide additional reading materials prior to their presentation this will be posted in CuLearn.

## REFERENCE MATERIAL (Be prepared to discuss in Class – also excellent for Projects)

**Sept 12**

**Canada-US Relations at:**

**Canada and NAFTA at:**

<https://www.bnnbloomberg.ca/nafta>

**NAFTA.NOW.org at <http://www.naftanow.org/>**

**Sept 19**

**Canada's International Trade Reports:**

[http://www.international.gc.ca/trade-agreements-accords-commerciaux/index.aspx?lang=eng&menu\\_id=57&view=d](http://www.international.gc.ca/trade-agreements-accords-commerciaux/index.aspx?lang=eng&menu_id=57&view=d)

**Sept 26**

**Canada Border Services Agency, Exporting Goods from Canada at:**

<http://cbsa-asfc.gc.ca/export/menu-eng.html>

**American Chamber of Commerce in Canada, Ottawa Chapter at:**

<http://www.amchamcanada.ca>

**Oct 3**

**Export Development Canada at <http://www.edc.ca>**

**Oct 10**

**Canadian Intellectual Property Office at:**

<http://www.cipo.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/Home?OpenDocument>

**Intellectual Property Case Study summaries at:**

<http://www.cipo.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/wr01947.html>

## Grading Scheme:

### Assignments

<b>Team Group Project – Company Evaluations</b>	30%
Written	20 %
Oral Presentation	8 %
Team Check in's / Progress Reports	2 %
Take Home Final (Case)	25%
<b>Class Preparation &amp; Participation</b>	45%
In Class Cases (3)	30%
Participation and Preparedness	15%
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	100%

The team group project and in class case assignments are established in order to maximize learning and provide an opportunity to apply the material covered throughout the course. Together, both assignments will require you to look outside at the environment where you plan to do business, as well as inside at the kind of North American manager you plan to become. To maximize learning and successfully complete these assignments, it is important that you come to class fully prepared and engage in class discussions.

### Team Group project

The team group project involves the completion of a major research project focusing on a Canadian company that has introduced (or is planning on launching) a new product or service into the United States in the last (next) 2-3 years. Completing the project successfully will require extensive research and analysis. Every team is required to write a case analysis that describes one Canadian company's experience doing business in the United States, from its entry to its expansion, including an analysis of its success factors, as well as its failures, including, if applicable, its strategy for exiting the U.S. market. You are not limited to mode of entry. It may be exporting, foreign direct investment, franchising, joint venture, or strategic alliance.

Papers should be no longer than 25 pages, 1.15 spacing, excluding appendices and graphs. Margins should be 1" and font size should be no smaller than Times Roman 12. Papers are due at the start of the last class, **Oct 17, 2019**.

The end result of this project is a written paper that applies what has been learned to this real company doing business in the US. The team's plan should be able to convince the reader (audience) of the viability of the initiative. Please see the project description document for details. The team group project is worth 30% of your grade. See the project grading sheet for grading criteria. There will also be an official team check-in. This will ensure you are working together efficiently, and that you are heading down the right path. The group team project will be done in teams of 3 to 4 students, depending on the class

size. The team will also present to the class their findings in the final class – each team will create slides and will have no more than 15 minutes.

### **Preparation and participation**

Class attendance, case preparation and completion as well as active participation are an important part of your grade. This includes arriving on time for all classes, having read all assigned materials, turning in assigned questions on time and being fully prepared to participate in class activities and discussions. You will be required to turn in your case analysis prior to class. If you are not handing in a case for a particular week – you should still be completing a preparation document consisting of short answers to the few questions about assigned readings and cases. The goal of the preparation documents is to help you think through some important issues prior to class. Your preparation prior to class is fundamental for a good discussion. Your write-ups will be graded on the basis of your understanding of the case, the thoroughness and completeness of your answers and your reference to North American business principles. The cases and the class discussions will be instrumental in helping you prepare both for the project and the final exam. Preparation and participation grades will range from 0 to 15 marks, depending upon performance, with highest scores reserved for **exemplary behavior**, not simply attendance. Please read the case preparation guidelines for more information on preparing and learning from cases.

### **Missed assignments and deferred final project:**

Students unable to complete the final project on time because of illness or other circumstances beyond their control must contact the instructor and the MBA office in writing to request a deadline extension. Extension may be granted when supported by a medical certificate and or appropriate document/s to support the reason for the deferral. Extended deadlines are not granted for students who have made travel arrangements that conflict with examination schedule.

Late cases will not be accepted. When a case is not submitted, the student must complete a preparation documents (short review of case and questions) to enhance their class discussion.

### **Drop Course Policy:**

The deadline for academic withdrawal is the last day of classes (each term).

## **GENERAL RULES FOR ANALYZING A CASE**

**See detailed Case analysis and write-up suggestions in CuLearn for specific detailed instructions.**

## 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 Spratt 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

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:

<https://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:

<https://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](mailto: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](http://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:

<https://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](http://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 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/>

### **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)

### **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/>

### **Important dates and deadlines**

<https://sprott.carleton.ca/students/mba/dates-deadlines-policies/>