



MBA

IBUS 5713 A

Doing Business in the United States

Fall 2017

Jim Neubauer
Tel. (613) 258-9789 (work)

Class: Mon 11:35 am -14:25 pm
Room 701 Dunton Tower

Email: jim.neubauer@carleton.ca or
jim.neubauer@sympatico.ca

Office hours: by appointment

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, published 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.

Date	Theme	Guest Speakers	Cases & Assignments
Sept 11	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.	<u>Tim Horton's</u> case for discussion
Sept 18	Financing Issues and complications when exporting or establishing a business in the US	Jennifer Greenberg Export Development Canada	<u>Foxy Originals – Expansion into the US</u> case is due at start of class Overview, in-class presentations and discussion
Sept 25	Market Research and company preparedness for doing business in the US	Rick Tachuck Chairman – AmCham Canada	<u>Frogbox</u> case is due at the beginning of class
Oct 2	US Market Access Issues – strategy, competition, channels	(Guest Speaker - TBD)	<u>Henry Birks & Sons</u> case is due at start of class
Oct 13 (Friday)	Exporting Canadian technology to USA		<u>Currie Road Construction Company</u> case is due at the start of class
Oct 16	Government trade promotion for exports to USA		<u>Team project</u> is due at start of class
Oct 20	Final Exam	Final Exam – due by 11:59 pm Oct 20th (submit electronic copy). Hard copy due Monday Oct. 23rd. Drop box will be used in DT810 830-430 pm After 430 please use DT801 Drop Box	<u>Take Home Final Exam</u> due by <u>11:59 pm</u>

Note: Cases can be downloaded from Study.Net or library

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.

ASSIGNED READINGS (Be prepared to discuss in Class – also excellent for Projects)

<p>Sept 11</p> <p>Canada-US Relations at:</p> <p>Canada and NAFTA at: http://www.international.gc.ca/trade-agreements-accords-commerciaux/agr-acc/nafta-alena/index.aspx NAFTA.NOW.org at http://www.naftanow.org/</p>
<p>Sept 18</p> <p>Canada's International Trade Reports: http://www.international.gc.ca/trade-agreements-accords-commerciaux/index.aspx?lang=eng&menu_id=57&view=d</p>
<p>Sept 25</p> <p>Doing Business in the US, Trade http://www.tradecommissioner.gc.ca/eng/offices-united-states.jsp 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</p>
<p>Oct 2</p> <p>Export Development Canada at http://www.edc.ca</p> <p>Exporting to the US http://www.tradecommissioner.gc.ca/eng/exporting-to-united-states.jsp</p>

Oct 13th (Friday)
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>
Invest Ottawa, Ottawa, at <http://investottawa.ca/>

Grading Scheme:

Assignments

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

		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 16, 2017**.

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.

IMPORTANT ADDITIONAL INFORMATION

Course Sharing Websites

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

Policy on Mobile Devices

The use of mobile devices IS NOT PERMITTED in this class. It is disruptive to the instructor and class members. If you carry such a device to class, please make sure it is turned off. If an emergency situation requires you to keep it turned on, please discuss this with your instructor prior to class.

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, followership and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your instructor 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.

Person 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).

Religious Observance

Students requesting academic accommodation on the basis of religious observance 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 academic 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 or instructors who have questions or want to confirm accommodation eligibility of a religious event or practice may refer to the Equity Services website for a list of holy days and Carleton's Academic Accommodation policies, or may contact an Equity Services Advisor in the Equity Services Department for assistance.

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 expulsion; suspension from all studies at Carleton; suspension from full-time studies; a refusal of permission to continue or to register in a specific degree program; academic probation; and a grade of Failure in the course, 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/>.

Important Dates – Fall 2017

August 25

Fall payment deadline. Late payment charges may be applied to the student account any time after this date.

September 1

Last day for receipt of applications from potential fall (November) graduates.

September 2-3

Residence move in weekend.

September 4

Statutory holiday. University closed.

September 5

Academic orientation (undergraduate and graduate).

Orientation for Teaching Assistants.

All students are expected to be on campus. Class and laboratory preparations, departmental introductions for students and other academic preparation activities will be held.

September 6

Fall term begins.

Fall and fall/winter classes begin.

September 15-17

Full and late summer deferred final examinations held.

September 19

Last day of registration for fall term and fall/winter courses.

Last day to change courses or sections (including auditing) for fall/winter and fall 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 Fall 2017 and must register for the fall 2017 term.

September 30

Last day to withdraw from fall term and fall/winter courses with a full [fee adjustment](#) (financial withdrawal). Withdrawals after this date will create no financial change to Fall term fees.

October 6

December examination schedule (fall term final and fall/winter mid-terms) available online.

October 9

Statutory holiday. University closed.

October 15

Last day for receipt of applications for admission to an undergraduate degree program for

the winter term from applicants whose documents originate from outside Canada or the United States.

October 23-27

Fall break. Classes are suspended.

November 1

Application deadline to study at another institution on a [letter of permission](#) for the winter term.

November 10

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

November 15

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

November 24

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

November 25

Winter Payment Deadline. Click [here](#) for important payment information. [Late charges](#) may be applied to the student account any time after this date.

December 1

Last day for receipt of applications from potential winter (February) graduates.
Last day for graduate students to submit their supervisor-approved thesis in examinable form to the department.

December 8

Fall term ends.
Last day of fall-term classes.