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2018-2b*

## **BAKER DONELSON**

Challenge Presented by: **Baker Donelson**  
USA  
[www.bakerdonelson.com/history](http://www.bakerdonelson.com/history)

### **Webinars:**

**Questions:** If you have further questions, please direct them to [Admin@X-Culture.org](mailto:Admin@X-Culture.org). Your questions will be directed to the company representatives.

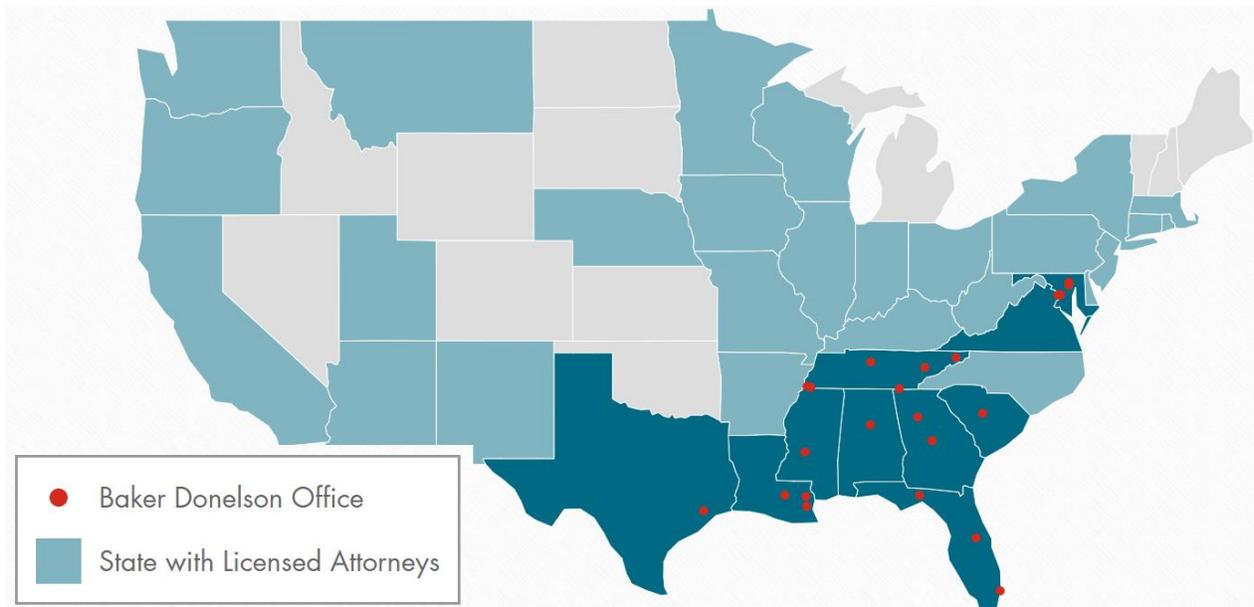
### **COMPANY DESCRIPTION**

Baker, Donelson, Bearman, Caldwell & Berkowitz P.C. is one of the U.S. largest law firms. Fortune has selected Baker Donelson as one of the 100 Best Companies to Work For nine times, citing the firm's commitment to diversity, public service and pro bono work.

Baker Donelson is a full service law firm, specializing in corporate law, mergers & acquisitions, labor and employment, real estate, bankruptcy, health law, intellectual property, business litigation matters and tax law. It is also known as having a large government relations (lobbying) practice. The law firm is organized into four main department, including Business, Disputes, Financial Services and Health Care. The Global Business Team, focusing on cross-border business and disputes, is a part of the Business Department.

Baker Donelson' Global Business Team's goal is to help our clients achieve success wherever their business takes them in the world. From our 22 offices located in key markets throughout the Southeastern United States and in Washington, D.C., and with the assistance of our extensive global network of local counsel and other professionals, we have helped our U.S. and non-U.S. clients take advantage of these global opportunities in over 90 countries spanning six continents.

The more than 75 members of the Global Business Team routinely work with companies and individuals from China, Japan, the United Kingdom, Central and Eastern Europe, Africa, Canada, Mexico, Central and South America in connection with their business activities in the United States. We also regularly assist U.S. companies and individuals in connection with their business activities in Asia, Europe and the Americas. Our cross-border attorneys are fluent in more than 15 languages, including German, Japanese, Spanish, Italian, Mandarin and Cantonese Chinese, French, and Portuguese.



Our cross-border services include:

- Cross-border mergers and acquisitions
- International dispute resolution, including arbitration, litigation and mediation
- Assisting primarily non-US companies establish green field and brown field operations in manufacturing, food and beverage, assembly and logistics and distribution
- Management of global intellectual property portfolios, including registration and enforcement of copyrights, trademarks and patents and trade secret protection
- Global immigration, including EB-5 permanent residence in the United States
- Cross-border labor & employment, including employee benefits
- International trade, including trade policy, tariffs, export controls (U.S. ITAR/EAR, and EU)
- Customs/import controls, including AD/CVD and tariff (§232/§301) exclusion requests
- United States economic and trade sanctions programs
- Global anti-corruption laws, including U.S. Foreign Corrupt Practices Act and The UK Bribery Act of 2010
- CFIUS filings
- Cross-border commercial contracts and related transactions, including but, not limited to, agency, distribution, sales of goods, construction, and technology licensing agreements
- Global public policy
- International tax
- Government contracts
- Negotiations with regulatory agencies and drafting Joint Venture Agreements, Joint Exploration Agreements, Operating Agreements, Acquisition Agreements and a wide range of supporting documents for foreign entities interested in the oil and gas business in the U.S.

We have clients in numerous industry sectors including transportation, energy, defense, aerospace, technology, construction, insurance, banking, hospitality, franchising, distribution, higher education, manufacturing, and telecommunication, gaming and healthcare industries.

## *History*

The company was founded by James F. Baker in Huntsville, Tennessee. The year was 1888, a time when professional service meant providing focused, individualized attention to every client. 130 years later our Firm has experienced several mergers, numerous name changes and tremendous growth. It has expanded from James Baker's Courthouse Square office to 22 offices with a presence in Tennessee, Florida, Georgia, Maryland, Mississippi, Louisiana, Alabama, Virginia and Texas, as well as Washington, D.C. Through it all, we have remained committed to helping our clients make smarter decisions, and becoming a valuable business partner. Below is a timeline that marks key milestones in Baker Donelson's rich history.

- 1888 – James F. Baker established a law firm in Huntsville, Tennessee. Over time and after several name changes, the firm eventually became known as Baker, Worthington, Crossley & Stansberry.
- 1903 – Stuart S. Janney and Albert C. Ritchie merged their Baltimore, Maryland practices to form a partnership known as Ritchie and Janney. After World War I, Frank B. Ober and Robert W. Williams joined the firm, and the firm became Ritchie, Janney, Ober & Williams. Albert Ritchie left the firm in 1920 when he was elected governor, and returned after a remarkable 16-year term in office.
- 1911 – Walter Chandler, original partner in the Firm later known as Chandler, Shepherd, Heiskell & Williams, began private practice in Memphis, Tennessee.
- 1928 – Abe Berkowitz founded a law firm in Birmingham, Alabama. Over time the firm became known as Berkowitz, Lefkovits, Isom & Kushner.
- 1954 – The law firm of Donelson & Adams was founded in Memphis, Tennessee by Lewis R. Donelson III and Ben C. Adams.
- 1963 – David Gambrell formed the Atlanta firm that would later become Gambrell & Stolz.
- 1964 – Donelson, Adams, O'Hearn, Grogan & Edwards merged with Shepherd Heiskell, Williams, Beal & Wall to become Heiskell, Donelson, Adams, Williams and Wall.
- 1969 – Ober, Williams & Grimes, as the Baltimore, Maryland firm was then known, merged with Cross, Shriver, Bright & Washburne and became Ober, Grimes & Shriver.
- 1980 – The firm of Leo Bearman merged with the Heiskell Donelson firm to become Heiskell, Donelson, Bearman, Adams, Williams & Kirsch.
- 1983 – The Baltimore, Maryland firm of Ober, Grimes & Shriver merged with the well-established Washington, D.C. firm of Kaler, Worsley, Daniel & Hollman, and the firm became Ober, Kaler, Grimes & Shriver.
- 1985 – The Orlando, Florida firm of Litchford & Christopher Professional Association was formed.
- 1990 – The Atlanta firm of Kennedy & Kennedy, later known as Kennedy, Davis & Hodge, was formed.
- 1993 – The Chattanooga firm of Caldwell, Heggie & Helton merged with the Heiskell Donelson firm, changing the name to Heiskell, Donelson, Bearman, Adams, Williams & Caldwell.
- 1994 – The Heiskell Donelson and Baker Worthington firms merged to form Baker, Donelson, Bearman & Caldwell.
- 1995 – The Firm opened its Jackson, Mississippi office with the addition of six leading attorneys.
- 2001 – The Firm merged with the Atlanta firm of Kennedy, Davis & Hodge, which specialized in intellectual property law.
- 2003 – The Firm merged with Berkowitz, Lefkovits, Isom & Kushner of Birmingham, Alabama to form Baker, Donelson, Bearman, Caldwell & Berkowitz.
- 2004 – Baker, Donelson, Bearman, Caldwell & Berkowitz opened offices in New Orleans and Mandeville, Louisiana, adding 19 leading attorneys to the Firm.
- 2005 – Hurricane Katrina prompted the opening of Baker Donelson's Baton Rouge, Louisiana office.
- 2007 – The Firm combined with the well-established Atlanta firm of Gambrell & Stolz.
- 2011 – The Firm merged with the Houston firm of Spain Chambers, marking Baker Donelson's entry into Texas.

- 2011 – Baker Donelson merged with Litchford & Christopher Professional Association of Orlando, giving the Firm its first Florida location.
- 2012 – Baker Donelson expanded its Texas presence through a merger with Drucker, Rutledge & Smith.
- 2013 – The Firm expanded its Florida presence with the addition of an office in Fort Lauderdale.
- 2014 – The Firm expanded again in Florida, with the addition of an office in Tallahassee.
- 2016 – Baker Donelson opened an office in Columbia, South Carolina.
- 2017 – Baker Donelson combines with the Baltimore based firm of Ober, Kaler, Grimes & Shriver, adding offices in Maryland and Virginia, creating one of the 50 largest law firms in the country.

### *Recognitions*

#### Firm and Culture

- Named as 57th largest law firm by National Law Journal in 2018 (based on number of attorneys).
- Ranked 91st largest law firm by The American Lawyer in 2018.
- Named as 49th largest law firm on Law360 400 (number of U.S. attorneys) in 2018.
- Ranked 96th on FORTUNE magazine's "100 Best Companies to Work For" list in 2018.
- Since 2006, listed as a "Go-To Law Firm" in the Directory of In-House Law Departments of the Top 500 Companies produced by Corporate Counsel and American Lawyer Media.
- Ranked 13th overall on Vault's "Best Law Firms to Work For" list in 2017 which includes a #1 ranking for Transparency, a #8 ranking for Formal Training, and a #10 ranking for Firm Culture and Informal Training.
- Ranked 10th overall on Vault's "Best Law Firms for Diversity" list in 2018 which includes a #3 ranking for Diversity for Women and a #10 ranking for Diversity for Individuals with Disabilities.
- Named to The BTI Client Service A-Team for 2018, recognizing client service excellence based on objective feedback from corporate counsel.

#### Attorneys

- 79 attorneys in Chambers USA: America's Leading Business Lawyers in 2018 across 25 practice areas.
- 5 attorneys in Chambers High Net Worth Guide in 2018.
- 277 attorneys in The Best Lawyers In America® 2019.
- 160 attorneys listed in Super Lawyers and 83 attorneys listed as Super Lawyers "Rising Stars".

#### Practices

- Ranked as a leading firm in Healthcare and Construction by The Legal 500 in 2016; one attorney is also recognized as a "Leading Lawyer" in Healthcare.
- 197 Tier 1 metropolitan rankings in 2018 U.S. News – Best Lawyers "Best Law Firms".
- Earned Tier 1 national rankings in the 2018 U.S. News – Best Lawyers "Best Law Firms" list in Commercial Litigation; Construction Law; Employment Law – Management; Health Care Law; Litigation – Construction; Litigation – Labor and Employment; Mass Tort Litigation/Class Actions – Defendants; Railroad Law and Real Estate Law.
- Ranked third in both the American Health Lawyers Association's "Top Honors" rankings and Modern Healthcare's "Largest Healthcare Law Firms" list in 2017.

- Selected by Chambers USA: America's Leading Business Lawyers as one of the nation's leading health law practices since 2010.
- Ranked in Chambers High Net Worth Guide in 2017 in the area of Private Wealth Law in Maryland, Mississippi and Tennessee.
- Named the 2016 U.S. News - Best Lawyers "Law Firm of the Year" in Railroad Law.
- Based upon total number of attorneys listed in The Best Lawyers In America® 2019, we are top-listed in the nation in seven practice areas: Business Organizations (including LLCs and Partnerships), Closely Held Companies and Family Businesses Law, Litigation - Construction, Non-Profit/Charities Law, Personal Injury Litigation - Defendants, Professional Malpractice Law - Defendants and Transportation Law.
- Named by Benchmark: Litigation (2017) as a "Highly Recommended" Firm in Louisiana, Mississippi and the Sixth Circuit; named as a "Recommended Firm" in Tennessee.

## THE CHALLENGE

Baber Donelson is already one of the largest and most reputable law firms in the U.S. with clients all around the world. Its goal is to become the "go to" firm in the Southern United States for inbound and outbound international/cross border work. It is currently organized for proactive marketing and business development initiatives around 3 geographic clusters: Europe (with focus on German speaking countries; Italy; France; UK; Spain); Asia (China, Japan and Korea); The Americas (Mexico, Canada, Brazil, Chile, Argentina). It does not have any offices located outside of the U.S., however, the firm is able to attract and to serve clients in markets outside of the U.S. through the law firm's extensive network (TerraLex, a global legal network, and personal relationships with other local attorneys and professionals and government officials).

The firm proactively markets and implements business development initiatives focusing on specific countries within the three geographic clusters identified above, Asia, Europe, and the Americas). The law firm's goal is to get in front of foreign businesses and individuals while they are considering their options as to investing, operating or doing business in the U.S. Based on experience, if the law firm waits until it hears or reads about a transaction or investment opportunity in the U.S., it often is too late to get retained by the foreign company or individual because they have already hired US counsel.

The law firm believes that being culturally fluent, as well as being able to work and speak in native languages, within the three geographic regions has provided the law firm with the opportunity to grow its client base in these three geographic clusters. The law firm has particular strength in German speaking countries, including Germany, Switzerland and Austria. Additionally, the law firm has several native Chinese attorneys who work on corporate, intellectual property, employment and immigration matters. With respect to global services that it offers its non-US clients, the law firm focuses its marketing and development activities on foreign direct investment in the US, either through an acquisition; merger; greenfield investment; brownfield investment; setting up of joint venture agreements; general commercial contracts; immigration needs; international disputes; and full array of trade related activities that could impact a foreign company wanting to do business in the U.S. and with the U.S.

One of the law firm's core strengths is a full service international trade practice.

The law firm would like to learn the following:

- Is the law firm's current approach of using primarily native attorneys from the country the law firm seeks to increase work from necessary? Are there other attributes needed to penetrate the market better?
- Is the law firm's "in country" approach of partnering with local law firms, associations, local chambers, etc. to put events on together an effective way to penetrate the market?
- Is membership in key in-country business organizations such as AmCham Italy and AmCham Germany an effective way to generate branding and exposure; how can the law firm use memberships in these organization more effectively to convert the memberships into revenue generating opportunities directly with the organizations' members?
- How can the law firm better position itself get in front of foreign companies that are looking to invest, operate or otherwise do business in the U.S.?

In its constant search for innovative solutions, the firm explores possibilities of expanding into new markets as well as more deeply penetrating the existing markets noted above. Please present your recommendations in a form of a strategy proposal that contains the following sections:

## Section I: Market

### 1. Competitive Position Analysis

To provide a foundation for your analysis, start with a survey of the industry and competition. Who are your client's main competitors? What are your client's strengths and weaknesses compared to the competition, and what are the threats and opportunities for your client?

When assessing your client's competitive position, you may find this [short guide](#) and this 5-min [video](#) on SWOT analysis helpful.

### 2. New Market Selection and Analysis

Based on your analysis of the client and competition, identify the most promising new market for your client. Where would the services be in most demand?

Please first consider the market characteristics that are essential to the success of the services in the market, such as the geography, brand awareness, cultural, economic, and political factors, trade regulations, certification requirements, etc. Based on a comparison of the countries that fit your criteria, select one market that you believe has the greatest potential for growth/success. Please keep in mind, a new market does not have to be a country. It could be a region of a country, a multi-country region, or just a new segment of consumers.

Conduct an analysis of the market in terms of:

- Key competitors in the proposed market, their strengths and weaknesses, their pricing and promotion strategies, etc.
- Provide an in-depth analysis of the market in terms of factors relevant to the success of your client in the market; provide all the information about the proposed market that your client needs to know to successfully operate there, including:
  - Cultural, legal, political, and economic factors that your client must understand to ensure the success in that market;
  - Consumer tastes and preferences with respect to your client's services.

#### *Evaluation Rubrics*

*7 - Clear and concise list of the client's strengths and weaknesses, threats and opportunities for its services, review of the market selection criteria, the recommended new market clearly matches the criteria, brief but insightful market analysis, strong supporting arguments, sources properly cited.*

*4 - A good analysis and recommendation, but some elements are not strongly supported, some parts are irrelevant or redundant.*

*1 - Impossible to figure out what the recommendation is, supporting arguments are absent or completely off the point, not supported by credible sources.*

## Section II. Marketing

### 3. Promotion Channels

- Who are the decision makers when it comes to buying your client's services? What is the most cost-effective way to reach these decision makers to promote your client's services in the proposed new market? Lawyers typically market using very traditional methods. Are these the best methods in the proposed new market? Are there more innovative ways to market the client's services in the proposed new market? In some cases, one of the best options is cheap or free channels such as online advertisement, mailing lists,

social media groups, professional associations and meetings, via bloggers or opinion leaders, industry periodicals, or similar channels that are more focused and less expensive than TV, radio, and the press. However, please keep in mind that in many countries/regions, advertising and unsolicited communications from attorneys is prohibited or highly regulated/restricted.

Should it be marketed directly to end consumers, or to intermediary such as retailers, distributors, or governmental agencies?

If applicable, provide a clear step-by-step guide for how to place an ad or distribute a message through the channels you are proposing, how much it will cost, how frequently should it be done, etc. For example, do not simply say “Advertise via Facebook”. Provide the exact steps, cost, contacts and other tips for maximum effectiveness.

#### **4. Message**

- What is the best way to convince legal consumers in the proposed new market to buy the service?
- What should be the main message of the marketing campaign and how should it be presented to resonate most with the customers in the proposed new market?
- What is the best slogan and other marketing campaign elements?
- If applicable, discuss if the brand name or its presentation should be modified to make the service more appealing to the tastes and traditions of the consumers in the new market.

#### **5. Promotional Materials**

To interest the potential customers, your client will need to present information about its services. Illustrate your knowledge of the target consumers in your chosen new market by developing a mock-up locally-tailored marketing brochure, email or webpage template, or social media post that your client can use to promote its services. It does not need to have the perfect graphic design. It should only serve as a concept sketch for what the promotional material should look like to be effective with the target market segment.

#### *Evaluation Rubrics*

- 7 – The recommended promotion channel(s) is inexpensive and allows to precisely target the potential customers, there is a clear step-by-step guide for how to place an ad there and how much it will cost, an appealing and convincing marketing brochure or ad is offered, with strong supporting arguments for each element.*
- 4 – Good suggestions, but not enough detail and weak supporting arguments, some parts are irrelevant or redundant, the formatting is inconsistent.*
- 1 - Impossible to figure out what the recommendation is, supporting arguments are absent or completely off the point, not supported by credible sources.*

### **Section III. Pricing Strategy**

#### **6. Pricing Strategy**

What is the best pricing strategy for the proposed new market? Develop the pricing strategy that will result in the highest profits in the proposed market, including the optimal price point, as well as the way the price should be charged. You may suggest a fixed-fee pricing per project, fixed-fee for a billable hour, alternative fees, monthly retainers, etc. What is the optimal price point for each option you are suggesting?

This blog and this article offer a good overview of some of the available pricing strategy options.

*Evaluation Rubrics*

*7 – The proposed pricing strategy is explained in sufficient detail and supported by convincing arguments and credible sources.*

*4 – Good suggestions, but not enough detail and weak supporting arguments, some parts are irrelevant or redundant, the formatting is inconsistent*

*1 - Impossible to figure out what the recommendation is, supporting arguments are absent or completely off the point, not supported by credible sources.*

## Report Structure and Formatting Guidelines

### Structure:

- Include an Executive Summary (300-400 words, bullet-list format preferred) that provides a short review of your key findings and recommendations. Please remember, the busy company owners and executives will not have the time to read hundreds of the reports, so they must be able to get a quick summary of the content of your report from the Executive Summary. Most managers will make a decision on whether to continue reading the report if the Executive Summary catches their attention. Therefore, make sure this important part makes it easy to see your key recommendations.
- At the beginning of each report section include a bullet list of the key recommendations and figures presented in the section (2-4 bullets, each 4-10 words long). Again, when presented with hundreds of the reports, busy executives must be able to get key figures and recommendations from these summaries.
- The Title Page must contain team number, client company name, names, emails, and countries of residence of all the team members and a short summary (5-15 words) of the role and work completed by each team member. If any of the team members dropped out or did not contribute to the report, please still list them, but add a note “Did not participate” by their names.

### *Evaluation of the Executive Summary*

- 7 - Short but gives a very good idea about the key ideas presented in the business proposal, the Client can get a good idea about the main points of the proposed strategy from the executive summary;*
- 4 - Gives some idea about the key suggestions, but some points remain uncertain; a bit too long; not to the point.*
- 1 - Not possible to figure out the key ideas of the business proposal from the summary, too short or too long*

### Formatting:

- The report must be 20-35 pages (5,000-8,000 words) including the title page, executive summary, and references. Each section should be 1-3 pages long. Generally shorter is better, so be as concise and focused as possible.
- Number all pages in your team report.
- Margins should be 2.5 cm (one inch) at the top, bottom, and sides of the page.
- Font type should be 12-point Times New Roman throughout the report.
- Double-space all body text.
- Indent the first line of a new paragraph.
- The text should be left-aligned.
- All citations used must be cited in the text and in a reference list at the end of each report. In-text citations should include only the name of the author(s) and the date of the publication. Full references should be provided at the end of the report. Please use APA reference style.
- A picture is worth a thousand of words, so use of figures, graphs, pictures, as well as tables is encouraged. It is recommended these are included in the main body of the report.

### *Evaluation of the Formatting*

- 7 – The report has a clear structure, visual appeal, the sections are consistently formatted, sources are properly cited, the formatting guidelines are followed exactly with respect to the page limit, font and other requirements.*
- 4 – The formatting guidelines are generally followed, but there are some deviations, there are some signs of sloppiness in document formatting.*
- 1 – The document looks very unprofessional, different report sections are formatted differently, the document is very hard to read and navigate.*

## TASKS AND DEADLINES

Each week, you will be asked to fill out a short survey to report your team's progress, evaluate the performance of your team members and provide other information we need to better understand why some teams perform better than others. Please see the informed consent form at the end of this document for more details.

**Important:** Participants who receive peer evaluations **below 2.0** (out of 5.0) will first receive a warning. If their peer evaluations stay **below 2.0** two weeks in a row, they will be automatically excluded from the team.

**Important:** Occasionally emails with invitations to take a survey are filtered into the Junk/Spam email folder. Please check your Junk/Spam email folder (search for messages with "X-Culture" in subject line) if you don't receive a survey invitation message around the date specified in the table above.

*All deadlines are set for 11:59 pm (23:59), EST time zone (New York).*

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### 1. Pre-project Readiness Test

Due: Any time before the official project start

Before the project starts, all participants must review project materials and take a Readiness Test. The test will include questions about the project and online collaboration tools, as well as questions about your prior international experience and background. You must successfully pass the Readiness Test (80% or more correct answers) to participate in X-Culture. If your semester starts after the official start of the project or you do not complete the Readiness Test on time for another reason, do so as soon as you can – we will continue adding new participants for about ten days after the project start.

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### Official Project Start, Teams Formed

Monday, October 1

As long as you successfully completed the Readiness Test, you will receive the names and contact information of your team members on this day. Please reach out to your teammates immediately to establish contact. Introduce yourself, and start working on the project. Students whose semester starts later will be added to the existing teams once their semester starts, so it is likely an additional student may be added to your team in the first two weeks.

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### 2. Establish Contact with Your Teammates

Due: Thursday, October 4

By this date, you are expected to have exchanged at least a few messages with your teammates. If some teammates are not responding, you are expected to send at least three email reminders to them by this date. Team members who fail to establish contact with their teams will be excluded from the project. Your communication starts via email, but once the initial contact is established, your team can use any means of communication.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask you to report whether or not you have communicated with all of your team members. Team members who fail to establish contact with their teams may be removed from the project.

**Note:**

This and all other weekly surveys will also ask to evaluate your team members' performance and provide other information we need to better understand why some teams perform better than others. Please see the informed consent form at the end of this document for more details.

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### 3. Meet Your Teammates

Due: Sunday, October 7

Meet your team members: Please learn as much as possible about your teammates (background, interests, hobbies, experiences, etc.). Research shows that spending a little time on getting to know team members greatly improves team effectiveness. It is also strongly recommended that you try a live video call (e.g., Skype).

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will test how well you got to know your team members. It will contain a few questions about your team members, such as their background, interests, etc. The acquaintanceship test will not be graded, so do not feel obliged to reveal any personal information to your team members or insist that your team members reveal their personal information to you. However, try to get to know your teammates as much as you can.

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### 4. Team Charter

Due: Sunday, October 14

By this date, your team is expected to review all available challenges and select your client organization. Before you choose your client organization, please carefully review the challenges presented by each organization and try to attend (or watch the recordings of) the webinars with each of the client companies, which will be held in the first week of the project.

Team Charter: Discuss with your team members and collectively write a one-page Team Charter that details how your team will operate. It is recommended that the Team Charter includes the following sections:

- *Distribution of roles and tasks.* Many teams divide the workload by the report section. Research shows teams perform better when they divide the workload by function: one person is tasked with coordinating team efforts, checking everyone's progress, sending reminders, redistributing tasks if needed; another person, usually a native English speaker, serves as a copyeditor, and so on. Many teams also select a person whose role is to question everything and force the team to weigh their options more carefully. Some teams assign a person whose job is to make sure nobody is ignored. Some people are shy or may have a hard time keeping up the pace and it is important they are not left behind and their opinions are voiced and given full consideration.
- *Dealing with conflicts.* How conflicts (interpersonal, task, process) will be resolved.
- *Dealing with free-riders.* In most teams, someone is always late, produces low-quality work, or underperforms otherwise. Sometimes, a team member stops working altogether (gets sick, busy at work, family problems, or simply drops the course). How will the team deal with a loss of team member? Who will redo the work, if needed?

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask each team member to submit the same copy of the Team Charter.

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### 5. Select your Client Organization

Due: Sunday, October 21

By this date, your team is expected to review all available challenges and select your client organization. Before you choose your client organization, please carefully review the challenges presented by each organization and try to attend (or watch the recordings of) the webinars with each of the client companies, which will be held in the first week of the project.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask you to report the name of your client organization.

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## 6. Initial Individual Research and Ideas

Due: Sunday, October 28

Conduct your initial research and try to learn as much as possible about the industry your client operates in: Who are the main players? What the most popular products and technologies? What new technologies and approaches are likely to dominate the industry in the future? Is the industry regulated by the government and how? What are the differences in different regions of the world? How does your client compare to the competitors? What are your client's strengths and weaknesses? Try to interview 2-3 potential customers of your client company to better understand how they make purchasing decisions and if (and why) they would choose your client over the completion.

Review the challenge questions listed in the three sections earlier and, based on your initial research, jot down your personal initial answers to each of them. You do **not** have to write more than a few words in response to each question at this point; just your initial ideas and possible answers. This will prepare you for the team discussions when your team will be collectively developing the best answers to each question. Even if your team decides to assign different report section to different team members, it is very important that each team member shares his/her suggestions for each question. This will give the team member responsible for the report section more to work with and help develop better final answers.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The weekly survey will ask you to report the results of your initial individual research and your initial individual suggestions for responding to each block of questions listed earlier. Specifically, you will be asked to:

- Report the results of your industry analysis, including a brief description of the industry, your client's strengths and weaknesses compared to the completion, etc. (bullet list of key findings, half a page total)
- Your initial recommendations for the most promising market, market entry mode, key elements of the promotion and marketing strategy, and key elements of the operation strategy (1-2 points in response to each question, a paragraph per question).

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## 7. Block 1: Market Analysis

Due: Sunday, November 4

This week, your team is expected to submit a draft of your Section 1. It does **not** have to be a fully finished report section. However, try to complete as much as possible. The more you complete now, the less work your team will have to do later. The drafts will not be graded by X-Culture and will not affect your chances of winning the completion (we only evaluate the final reports). However, the instructors will have access to these documents in case they would like to review your work and provide feedback.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask you to submit a draft of your Report Section 1 (the survey will contain a document upload link). Although your team is expected to develop the section draft collectively, only one team member will be asked to upload the document on behalf of the team. However, every team member will be asked to complete the rest of the progress survey (questions about how your team is doing and peer evaluations).

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## 8. Block 2: Marketing

Due: Sunday, November 11

This week, your team is expected to submit a draft of your Section 2. It does **not** have to be a fully finished report section. However, try to complete as much as possible. The more you complete now, the less work your team will have to do later. The drafts will not be graded by X-Culture and will not affect your chances of

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winning the completion (we only evaluate the final reports). However, the instructors will have access to these documents in case they would like to review your work and provide feedback.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask you to submit a draft of your Report Section 2 (the survey will contain a document upload link). Although your team is expected to develop the section draft collectively, only one team member will be asked to upload the document on behalf of the team. However, every team member will be asked to complete the rest of the progress survey (questions about how your team is doing and peer evaluations).

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### 9. Block 3: Operations Management

Due: Sunday, November 18

This week, your team is expected to submit a draft of your Section 3. It does **not** have to be a fully finished report section. However, try to complete as much as possible. The more you complete now, the less work your team will have to do later. The drafts will not be graded by X-Culture and will not affect your chances of winning the completion (we only evaluate the final reports). However, the instructors will have access to these documents in case they would like to review your work and provide feedback.

**Deliverables:** A few days before the deadline, you will receive an email with your personal weekly survey link. The survey will ask you to submit a draft of your Report Section 3 (the survey will contain a document upload link). Although your team is expected to develop the section draft collectively, only one team member will be asked to upload the document on behalf of the team. However, every team member will be asked to complete the rest of the progress survey (questions about how your team is doing and peer evaluations).

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### 10. Complete Draft

Due: Sunday, November 25

By this date, your team is expected to have a complete draft of your report. It does not have to be a finished report, but it should be as complete as possible, including Title Page and an Executive and Chapter Summaries, and correct formatting throughout the document.

**Deliverables:** **One team member** should submit the draft **via TurnItIn.com** on behalf of the entire team (see step-by-step submission guidelines below). After your document is submitted, TurnItIn will generate a plagiarism report that will show you if any parts of the report have been plagiarized (takes several hours to produce). Usually, up to 20% similarity is acceptable, provided that copy-and-pasted materials are properly referenced. If plagiarism is detected, your team will have until the Final Report deadline (see below) to fix the problem and submit a plagiarism-free final report.

This draft will not be graded and the plagiarism statistics will not be shared with your instructors. This is only for your information. You should continue editing the report until the final deadline and you can still make any changes or additions.

However, it is strongly encouraged that you submit as complete a document as possible, You will be able to submit your draft and check it for plagiarism **only once**, so the more complete the draft, the less the chance that the final report will contain plagiarism.

Also, **every team member** will be asked to submit your usual weekly progress survey. A few days before the deadline, you will receive an email with the usual questions about your team.

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## 11. Final Report

Due: Friday, November 30

By this date, your final report must be submitted via TurnItIn.com (see Submission Guidelines below). Please note, the plagiarism statistics for final reports will be generated by TurnItIn and shared with the instructors, but the plagiarism report will **not** be shared with the students.

Only one team member must submit the final document via TurnItIn.com on behalf of the team.

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## 12. Post-Project Survey

Due once report submitted, but no later than: Sunday, December 2

A few days before the deadline, you will receive an email invitation with a link to your post-project survey. This is the **most important** survey.

The survey will ask about your experiences in X-Culture and evaluate the performance of your teammates. Your answers are extremely important and will help us improve the project in the future.

**Every team member** must complete the survey.

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## Submission Guidelines

The report draft and the final report documents must be submitted via [www.TurnItIn.com](http://www.TurnItIn.com). Only one team member must submit the documents on behalf of the entire team. The team member who will be submitting the draft and final report must follow these steps:

*Part 1. Create a TurnItIn account (time required: 60-90 seconds).*

1. On [www.turnitin.com](http://www.turnitin.com) and click on the link "Create Account".
2. On the next window, under the "Create a New Account" heading, click on the "Student" link.
3. Enter the Class ID. Note the Draft and Final report submissions have different Class IDs:  
Class ID: **19160106** (password **xculture**)

Note: if you already have a TurnItIn account, simply log on using your "old" login information, click on the "Enroll in Class" tab on the top, and repeat step 3.

*Part 2: Submitting the paper (time required: 60-120 seconds)*

4. Once the account is created, you can log into your account. Your home page will list your classes.
5. Select the correct class and click on the "Submit" button.  
**Make certain to select "Draft" assignment for the report draft and "Final Report" for the final report.**
6. Choose Single File Upload.  
Make certain the file name only contains your team number.  
**Wrong:** "Final report 123.pdf", "Team Report.pdf", "Team 123.pdf", "John Smith.pdf"  
**Right:** "123.pdf"
7. Click on "browse" to locate the paper saved to your computer.
8. Click on the file and click "open".
9. Click the "upload" button at the bottom.
10. Click "submit" to confirm your submission. Once the submission is finalized, you will see "Your submission was successful" on the top of the page. If you wait a few hours, you will see your "originality report" that shows how much and what parts of your report have been plagiarized.

## Consent to Act as a Human Participant

Project Title: International Student Collaboration Project: Dynamics and Performance in International Virtual Teams  
Project Director and Principal Investigator: Dr. Vasyl Taras.

One of the requirements of your International Business course is to complete an international collaboration exercise. You will be teamed up with several other students who are enrolled in similar International Business courses at universities around the world. Working as a team, you will be required to develop a business plan for an international company.

To help you better understand and interpret your experiences and to give you a chance to compare your own experiences with those of other students participating in the exercise, data about your prior international experiences and perceptions about international collaboration will be collected before and after the exercise. In addition, you will be asked to provide peer evaluations once the project is over, and the quality of the team reports will be evaluated by the instructor. A summary will be presented to you at the end of the project, so you can see how your experiences compare to those of other students, how attitudes and perceptions about international collaboration have changed, on average, over the course of the project, and how team composition and prior international experiences tended to affect group dynamics and performance.

Once the project is over, all personal information will be deleted from the dataset, and the data will be completely unidentified, making it impossible to match responses with the names of the people who provided them.

Most of the data will be collected online. Absolute confidentiality of data provided through the Internet cannot be guaranteed due to the limited protections of Internet access. Please be sure to close your browser when finished, so no one will be able to see what you have been doing.

The risks associated with your participation in the study are minimal.

Please note the data collected during the project may be used for the purposes of research, the results of which may be published in scholarly journals. Any publication will contain only a general summary of the results. No personal information will be reported or shared.

Because your performance in the exercise is counted towards your course grade, the research project is treated as one of the required course exercises/tests. You have the right to refuse to participate or to withdraw at any time. Your grade in the course will be adjusted accordingly, just as it would if you chose not to write a test or complete a homework assignment. If you choose to withdraw, you may request that any of your data which has been collected be destroyed unless it is in an unidentifiable state.

While participation in the project is required as part of your course, it is your right to disallow the use of the de-identified data you provide for research-related purposes. If you do not object that the data you provide during the project can be used for research-related purposes, and the results of the study can be disseminated through scholarly publications, keep this consent form for your records. If you object to the use of the data you will provide during the course project, please indicate so at the bottom of this form. Return the form to your instructor, and your data will not be used for any research-related purposes. The results of the study based on the data you provided will not appear in any resulting publications. Your decision to allow or to deny the use of the data you provide during the project for research related purposes will have no effect on your grade.

If you have any concerns about your rights, how you are being treated or if you have questions, want more information or have suggestions, please contact Eric Allen in the Office of Research Compliance at UNCG at (336) 256-1482. Questions, concerns or complaints about this project or benefits or risks associated with being in this study can be answered by Dr. Vasyl Taras who may be contacted at (336) 256-8611 or [v\\_taras@uncg.edu](mailto:v_taras@uncg.edu).

If significant new information relating to the study becomes available which may relate to your willingness to continue to participate, this information will be provided to you.

For a copy of the approval letter from the Office of Research Compliance of the Institutional Research Board, please visit [www.vtaras.com/11-0260\\_IRB\\_Approval.pdf](http://www.vtaras.com/11-0260_IRB_Approval.pdf)

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If you not wish to grant the right to use the de-identified anonymous data that you provide during the project for research-related purposes or disseminate the data through a publication in scholarly journals or in any other form, please fill out this form:

[https://uncg.qualtrics.com/jfe/form/SV\\_39Hu41lah50VeaF](https://uncg.qualtrics.com/jfe/form/SV_39Hu41lah50VeaF)

Your decision to not allow the use of your data for scholarly research will have no effect your course grade.