

**VENTURING FAR 'AFIELD': THE CHALLENGE OF AN INTERNATIONAL MARKETING FIELD PROJECT**  
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### **ABSTRACT**

The phases and tasks of managing international field projects and methods for assessing results are discussed. Examples and recommendations are provided to guide the development of an international field project.

### **INTRODUCTION**

The importance and interdependence of the global economy has never been greater and business schools must meet the challenge to prepare students for this environment

A number of different approaches have been utilized to add international experience to business programs including study abroad (Duke 2000, Ryan 1996); overseas internships (Toncar and Cudmore 2000); adding international courses within or across disciplines; infusing an international orientation into courses across the curriculum; and exposing students to language and culture courses outside of the business school. Additionally, there has been an interest in internationalizing the marketing curriculum and exploring various pedagogical approaches for teaching students about international marketing issues (Cateora and White, 1979; Zimmer and Greene, 2000).

Several researchers have described the use of field projects with an international orientation. Karnath and MacNab (1996) undertake projects for international clients but using the US domestic market as the focus--students identify prospects in the US market for a foreign client. Frear and Metcalf (1988) describe an international marketing workshop for MBA students—an approach that uses instructor screening of student participants.

Given the many benefits of the field project experience in other courses (Malhotra et al., 1989; Haas and Wotruba, 1990), we feel this method deserves greater attention as a pedagogical approach in the international marketing course. Our purposes here are to: (1) describe the tasks involved in the three phases of the international marketing field project--the launch, execution and assessment phases, as shown in Figure 1, (2) illustrate how to manage field projects--standard issues encountered in both domestic and international projects as well as issues unique to international projects, and (3) suggest strategies for assessing the project results in meeting the needs of four key stakeholders-- the college, its students, clients, and the regional community.

### **LAUNCH: PRE-PROJECT ACTIVITIES**

The preplanning for an international field project, as

with any domestic marketing project, requires that both the instructor and client establish mutually agreed upon objectives. The instructor needs to ensure a balance between client and student learning objectives. Objectives must be realistic given the students' time and talents during the term while satisfying the client needs. For example, clients may want students to identify potential distributors for products in a given international market while the students would benefit more from analyzing the advantages and disadvantages of marketing the product in several international markets in order to appreciate the unique challenges and opportunities presented in diverse international markets. Likewise, a client may seek to have students study a large number of potential product-markets, a set that could not be tackled in reasonable depth to benefit the client or the student within the time limits of the course.

For schools operating outside metropolitan areas, and even for those that are in metro areas that are taking a first run at international projects, it can be useful to use a semester to develop an assessment of regional business needs before undertaking a set of client projects. This will not only allow the instructor to better determine what the perceived needs and challenges are for local area businesses interested in international markets but also what the interest level is in obtaining assistance from the university through a student project. This approach involves using the assessment of the local and regional businesses as the semester long field project.

### **Obtaining Projects**

Projects may be uncovered from international marketing assessment studies of local and regional businesses, by publicizing the opportunity through the chambers of commerce, university outreach publications, through Small Business Development Centers, faculty and alumni contacts in the business community, and through connections with Department of Commerce and State Trade offices. Often regional Commerce Department and Trade Office officials are eager to speak to international marketing courses and provide assistance to these types of projects. They are also in a good position to step in and provide additional support to client companies at the conclusion of the student projects.

### **Type Of Course**

One of the first planning considerations is the type of international marketing course. Is the international marketing course an undergraduate course that has as its only prerequisite the principles of marketing course and may be taken by both marketing and non-

marketing majors? Is the international marketing course offered at the graduate level? Is the international marketing course a capstone course at either the undergraduate or graduate level? International field projects may be conducted in any of these types of courses but will influence the instructor's preparation and supervision of the project as well as the nature and type of projects undertaken by the student teams.

### **Student Preparation**

There are a number of dimensions to consider--courses taken, cultural inexperience, problem solving and organizational skills. At a minimum, we expect that students in an international marketing course have at least taken the principles of marketing course. How long ago did students take principles of marketing? For some graduate students, it may have been some time ago. Have the students taken a marketing research course? This can be one of the single biggest issues in conducting a field project and many graduate students are more poorly prepared to conduct secondary and primary marketing research than undergraduate students.

Many students have had few opportunities to travel outside of the US and often many undergraduate students have not even traveled out state. They often lack experience in dealing with different cultures. This is particularly true in environments with little student diversity. If you are fortunate enough to have international students in the class, this can be an asset for the field project teams as these students are more aware of cultural differences and issues.

Instructors can utilize assignments and mini cases to build skills needed for the project. These can include "country briefings" to introduce students to the characteristics and challenges of marketing in different countries. Both domestic and international projects are challenging problem-solving exercises for students. The additional complexity and uncertainty of the international field project can overwhelm some students. The instructor needs to provide guidelines and examples for the project and written report to students. This, as well as careful coaching of the student teams, helps to produce a quality end product.

### **Matching Projects And Teams**

The demands of particular projects may necessitate larger or smaller teams. In general, smaller teams are easier to manage, increase the amount of instructor coaching time and reduce the likelihood of free riding (Strong and Anderson 1990). It is often important to balance student teams to ensure that each team has someone that has taken marketing research or other course work when there are no course prerequisites beyond the principles course. It is also beneficial to consider balancing teams for some diversity among US and international students. When possible, it is useful to provide students some choice in which project team they will be on (Gaidis and Andrews 1990

Haas and Wotruba (1990) describe a very effective method for organizing a project oriented course by interviewing students and "hiring" them into different positions. Even if time does not permit the entire interviewing process to be utilized, using application forms allows faculty to begin to identify individual student strengths, interests in leadership, and weaknesses in order to assemble balanced teams.

This approach, as well as projects utilizing a larger number of students, generally has appointed leaders. Smaller project teams, four or fewer students, are often "leaderless"--there is no designated leader though one may emerge over the course of the project. The organization structure for the teams and the perceptions of the team members regarding accountability and team roles can effect performance and motivation.

### **Selecting And Motivating Students**

"Hiring" or assigning students responsibilities on the project team, face-to-face meetings with the client to refine the project scope of work, and the end of term deadline and responsibility of making a presentation and delivering a written report to the client are both motivating and intimidating to students. Most students take the project very seriously and become committed to the project. They understand or grow to understand the importance of the project--even when the client does not completely understand the value of the project. Peer pressure and the use of peer evaluations to determine part of the overall project grade often provide additional incentive, particularly for the less motivated student.

With international field projects, it is imperative that students understand the special complexities of such projects--beyond those in traditional field projects--such as unique social and cultural forces and limited access to secondary data. Because any field project can create frustrations and challenges for the student, the instructor for an international field project must communicate the challenges early and often to the student and help them come to terms with the means for coping with these challenges.

### **EXECUTION: PROJECT ACTIVITIES**

While all faculty members using real-world field projects in their courses have their own success strategies, we shall divide discussion of project execution into three parts: (1) recognizing the differences between domestic and international projects, (2) the sequence of project activities, and (3) some lessons learned.

**Differences Between Domestic and International Projects.** Both domestic and international field projects share a number of similarities including the need for a valuable deliverable, potential for communication problems, management issues with a leaderless groups, the need to understand key project management guidelines, and balancing student, client and university goals to find a win-win solution.

At the same time there are striking distances between domestic and international field projects. Handling language problems among team members and with international contacts can be a challenge. While a multinational team facilitates better global understanding, it can add complexities if the final report is to be delivered in English with most secondary and primary sources in another language. This may also require identifying resources for translation.

Few countries have the quality or quantity of secondary data from government agencies or trade associations available in the U.S., which affects expectations of both students and clients. Similar problems exist with primary data from customers, prospects, employees, and distributors. While there continue to be huge improvements in data availability for research on international markets, it is often difficult to anticipate the data collection and lack of available data until further into the project than with a domestic marketing project.

Team member characteristics such as "openness" among Americans, who often have the image of being overly-talkative, overly-aggressive extroverts, can have the effect of intimidating international students or client contacts, causing serious communication problems for the team and project. Another issue is recognizing that impact of one's self-reference criterion on the ability to truly see and understand a foreign market (Cateora and Graham 1999). In other words, "not knowing what we don't know". The problem of failing to understand deeper cultural issues in the international market cannot readily be assessed by a student team with no direct

experience in the country of interest.

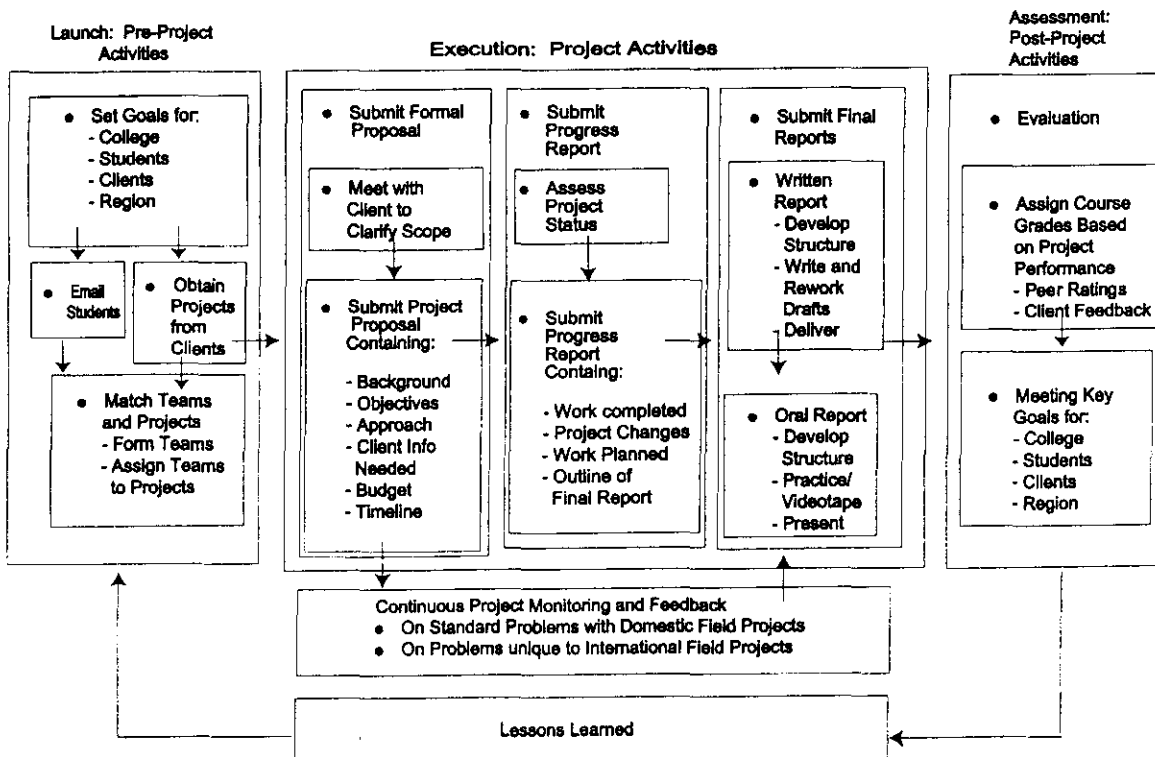
While planning ahead is important for any field projects, it is particularly important when the information necessary for the project may need to be obtained by interviewing or surveying key informants internationally. Call backs and following up on information collected can be far more difficult.

**Sequence Of Project Activities.** As shown in the large middle box in Figure 1, written project deliverables typically include a formal proposal, progress report, and final report.

**Formal Proposal.** An international project team's initial meeting with the client involves special problems of defining and clarifying the project scope. What kinds of secondary data in reports or on the Internet are available? What language(s)? Do members of our student team have these language skills? What kinds of access to personal contacts in the country or countries under study can our client provide? Do we access them by telephone, or e-mail, or fax? If by telephone, are the time zones or costs a problem? Given the data likely to be available, should the project be a full-fledged marketing plan or is a market research study a better choice? Also, how many countries and product(s) can reasonably expected to be studied? Answers to many of these questions are far different for an international field project than for a domestic one.

The actual elements in the project proposal, shown in Figure 1, are common to both domestic and international field projects. Especially for small US manufacturing firms, the most common project

**Figure 1. Activities in Managing an International Marketing Field Project**



starting point is not identifying a strategy to enter a single country, but rather the issue of identifying one or several countries that seem to hold the greatest opportunity for success.

Figure 2A shows the trade-offs usually made in international marketing field projects done by student teams: go into limited depth in an analysis of, say, six countries or go into twice as much depth in a study of only three countries.

Figure 2A. Phase Project: Width Versus Depth

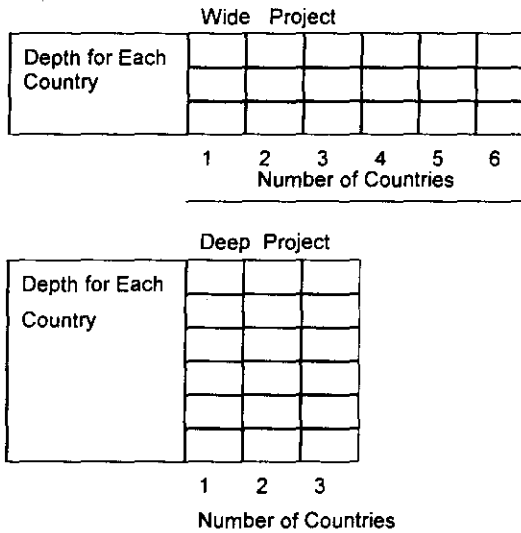
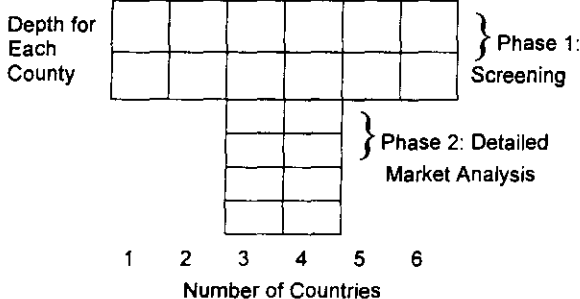


Figure 2B shows what is often a preferred alternative to the two options shown in Figure 2A: a two-phase approach. Note that in all three scenarios the area of the rectangles is equal – representing equal numbers of student hours.

Figure 2B. Phase Project: Width and then Depth



Many academic papers and business studies have suggested ways to apply screening criteria to choose countries. Criteria range from economic and customer factors to those dealing with political stability, corruption, and attitudes toward foreign companies. This "weighted-factor method" appears in Figure 3, as applied to a medical device. Note the presence of a strange factor here – "percentage of airport runways paved" – that is largely irrelevant for this study but is typical of the kind of creative (!), curious (?) factors we have all encountered in student reports. Multiplying the "factor weight" – often specified by the client – by the "grade" given that

factor by the team for the specific country gives the "weight X grade" total. A look at the bottom-line totals shows Country A to be the apparent clear winner. But this "winner" faces the limitation of all such linear, compensatory types of models: winning in a grand total can mask one or two absolutely critical factors. In this case it is factor #5, "government-required approval," that is critical to marketing a medical device in a foreign country. If it does not have the country's medical "stamp of approval," marketing the device may be impossible in that country, so the device could probably more likely be marketed in Country B, not in Country A – the reverse of the weighted results.

Figure 3A: Two Approaches to Screening – Countries to Consider for Export, Weighted-Factor Method

Factor	Factor Wt.	Country A		Country B	
		Grade	Wt. X Grade	Grade	Wt. X Grade
1. Per Capita GDP	8	9	72	3	24
2. Physicians/100 population	10	7	70	2	20
3. Annual economic growth	5	5	25	8	40
4. % Airport runways paved	3	8	24	1	3
5. Government-required Approval	10	1	10	9	90
Total			201		177

Figure 3B: Top-Down Method of Estimating Annual Profit

Factor	Country A	Country B
1. Units sold in country last year	1,000,000	2,000,000
2. % of geographic area with our distribution	50%	25%
3. % first year market share in our distribution	2%	3%
4. Average retail price to consumers (\$)	\$35/unit	\$34/unit
5. % of retail price going to our resellers	40%/unit	45%/unit
6. Delivered cost to our first distributors (\$)	\$15/unit	\$12/unit
7. First year before-tax profit (\$)	\$84,000	\$100,500

Figure 3B shows a top-down method of estimating annual profit that might be achieved the first year in entering a new country with, say, an electrical appliance. While more difficult than the approach in Figure 3A, this top-down method focuses on key variables tied directly to an exporter's likely profitability in a new country – factors such as likely market share, the fraction of the country in which distribution is likely to exist, reseller margins, and so on. Our simple example does not contain other marketing expenses like promotion, but embedded in the analysis is a forced look at factors like import duties, present in the "delivered cost" estimate. Both the methods rely heavily on subjective estimates, but at least the top-down approach forces an analysis to

provide the common denominator across all countries of "first-year, before-tax profit."

**Progress Report.** No real-world project goes from proposal to final report, without glitches: new events, data that are available or aren't, a client's changing mind – all require changes from the picture contained in the proposal. This is the reason for a formal two or three page progress report describing work completed to date, project changes in objectives or approach necessitated by new information, and work planned for the remainder of the project – the middle block in the execution box in Figure 1. As part of this process, student teams should provide a detailed report outline (or rough draft table of contents) halfway through the semester. While often painful, forcing them to identify data gaps before that last midnight session saves huge amounts of time in the project. We've found an outline with four columns is most useful: (1) sections of the report shown to second-level and third-level headings, (2) estimated page length for each topic, (3) table(s) or figure(s) to use in each section, and (4) team member responsible for writing each section.

**Final Report.** The international field project culminates in having the student team deliver a final oral and written report to the client. For most of us teaching this course, these final reports are anti-climatic. The battles fought getting to this point are critical. Some lessons learned fighting these battles include:

Reviewing basic materials. Capstone international marketing courses build on knowledge that students should have received earlier in both regular and international marketing courses. With graduate field project courses often containing many students with diverse backgrounds in terms of work experience and course preparation, some of this basic knowledge may be missing or forgotten. Mini-lectures and mini-cases to cover key concepts like market segmentation and questionnaire design are usually necessary. For undergraduate international marketing courses, the only prerequisites for the course may be the principles of marketing course and the challenge is greater. Nonetheless, a careful integration of course material and a client-sponsored team project can be extremely effective in anchoring key international marketing concepts.

Overcoming "blank page psychosis." Even graduate students panic when asked to get that first word on a blank sheet of paper. We have found that fill-in-the-blank section handouts for the proposal, data collection plan, and executive summary of the final report give students a much-needed jump start. Providing a template for the report and making copies of past reports available as examples is extremely helpful.

Getting one-third of the paper early. Forcing students to submit part of the paper before they think they are ready pays big dividends in recognizing gaps early enough to be able to correct them. This also enables a team to fine tune their work and agree on formats for report headings, tables, figures and so on. This

enables student teams, often with members having widely divergent backgrounds and writing experiences, early help in finding these common structures.

Having a data collection plan. Requiring each project team to submit a written data collection plan. This helps students focus on the particular demands of an international project as well as industry and client specific research demands.

Videotaping oral final report practice presentations. Letting students see their trial final oral report on videotape saves many instructor words and much embarrassment later on. International students are often especially reluctant to participate in the final oral presentation because of concern about their skills in spoken English. Our rule is that whenever feasible, every team member does about equal parts of the final oral report to give them valuable, much needed experience. When project teams get larger than four or five members, it is often impractical to have every member involved in the final oral presentation. In these instances, it is often possible to get all students involved in some sort of oral project presentation such as a presentation preliminary findings or a presentation on alternative markets though they might not all have opportunity to make the final oral presentation personally.

Professional editing of the final written report. This is invaluable if the client's budget permits. Both US and international students can benefit from the word-by-word scrutiny of a professional business editor.

#### **ASSESSMENT: POST-PROJECT ACTIVITIES PROJECT PERFORMANCE**

Project evaluation from the instructor is an ongoing part of a successful project. The instructor serves as a mentor and coach to the student teams throughout the term. The emphasis is on feedback and comments focused on how students can improve their work to raise it to a professional level. (Gaidis and Andrews 1990) This often means the instructor evaluates the overall quality of the final product with a grade but evaluates intermediate products on the path to the final project with lower-weighted grades or perhaps without grades but with extensive written comments to guide the team in improving upon the project.

Client evaluations provide value in assessing how well project objectives were met and to track satisfaction with the processes and program for field projects. However, it is often inadvisable for the client to "grade" a student team project. Often clients are not knowledgeable about group dynamics, instructor efforts to "save" a disaster-ridden project, frantic 11<sup>th</sup> hour efforts to pull things together. Also, the client may have lost objectivity on the project due to working closely with a student team. Client evaluations of student projects do have value for gaining insights into the project process that can improve and facilitate future client, faculty and student interactions.

## Peer Evaluations

Team member evaluations are an important part of determining individual project grades (Beatty et al 1996, Gaidis and Andrews 1990). It is important for students to understand at the onset of the project how peer evaluations will be conducted and used in calculating project grades. Strong and Anderson (1990) advise anonymous individual evaluations of team members. We use anonymous individual peer evaluations and have developed our own instruments for this purpose. While methodologies exist for comparing peer evaluations for an individual team member or against self-evaluations, the results largely identify the extremes in performance on individual teams and recognize the extremely high and low performing team member with an adjustment in their project grade.

## Meeting Stakeholder Goals

Colleges often are interested in measuring the number and type of projects completed and the number of students involved as part of its outreach and community service mission. Student evaluations for the course and for the project can routinely be completed at the end of the term. While these evaluations are generally quite positive, we have found that often students do not fully appreciate what they have gained from the project until after they have recovered from the final presentation. A survey of field project participants--both clients and students--one or more years after the experience is a better way of finding out how worthwhile the experience was in retrospect. Client evaluations can be conducted after the final presentation but again this does not allow for any assessment of how the study results were utilized.

Many organizations tap into student field projects as a means of extending their own limited marketing staff and resources. An important part of a successful field project is "closing the loop" for the client--putting them in touch with resources that can help them act on the results of the study. This could mean tapping into the university internship program for assistance, matching up state and local economic development, trade and marketing resources so that the client can take the appropriate steps to pursue international opportunities. This expands the college's reach and involvement in the region beyond the client that can in turn lead to new projects for the next term.

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