

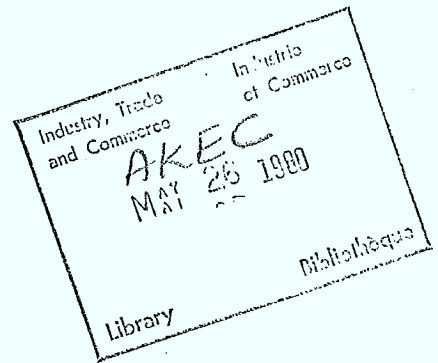
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**SURVEY OF
SMALL BUSINESS
MANAGEMENT AND
ENTREPRENEURSHIP
EDUCATIONAL
ACTIVITIES
IN CANADA**



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CANADA

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Small Business Secretariat,
Industry, Trade and Commerce,
Ottawa, Canada. *Dept. of*

1980

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FOREWORD

The information contained in this Directory was obtained by Professor Kenneth E. Loucks and his Research Assistant Bryan Coates under a research grant from the Small Business Secretariat of the Ministry of Industry, Trade and Commerce. The purpose of the research was to survey the small business management and entrepreneurship educational activity in Canada. The specific objective was to prepare a Directory of Small Business Courses offered or to be offered at Canadian universities, community colleges and other institutions in order to stimulate more and better small business oriented curricula.

For purposes of this survey a small business course was taken to include those offerings of greater than ten hours of classroom time that have small business management, entrepreneurship, new venture formation or technological innovation and its exploitation as their primary orientation.

Small business is defined as those enterprises in which all the key management decisions are made by one or two people, usually the owner, without the aid of internal specialists. The firm will be independent and not dominant in its field.

Also included in this Directory is the results of a survey of other institutions and trade associations into their educational activities in small business management and entrepreneurship. Information collected on course outlines and resource material as received has been included.

A combination of mail and telephone techniques were used to contact 49 universities and 60 community colleges located across the country. We believe this to be a 100% survey of those post secondary institutions likely to be involved in educational activity in the subject matter of the survey.

Thirty of the universities (61%) offered a total of 65 relevant courses. Twenty of the universities cooperated by providing course outlines on 34 (52%) of the sixty-five relevant courses.

Twenty-one of the sixty community colleges (35%) offer a total of 28 courses in the subject matter of the survey. Thirteen colleges cooperated by providing course outlines on sixteen (57%) of the twenty-eight relevant courses.

Thus across Canada a total of 51 post secondary educational institutions offer a total of 93 courses in small business management and entrepreneurship. The calendar descriptions of all of these courses and the course outlines for 53% of them are contained in this Directory.

In deciding what courses to include in this Directory a number carrying the title small business management were examined and rejected. This was because they either dealt with a limited number of management functions or with only related topics or they were too narrowly confined to one field of endeavour.

A review of the course outlines submitted reveals significant confusion of terms. Entrepreneurship, small business management and new venture management appear to be terms used interchangeably. Of the course outlines submitted, twenty dealt exclusively with entrepreneurship but ten of them were labelled with some variation of small business management. A further nine courses dealt with mixtures of start up and operating issues, and six of them carried the labels small business management. It would aid communication if those in the field would confine the term entrepreneurship to courses dealing with the conception and creation of a commercial entity. Courses addressing the operating plans and strategies of on-going smaller enterprises could carry the title small business management.

In my analysis of course offerings at the post secondary institutions approximately 40% are concerned solely with assessing feasibility and preparing a business plan of the type that would be presented to a venture capitalist or other source of financing. Another 20% deal with operating problems as well as start up matters, usually focusing on retail and service operations. Another 20% deal solely with operating policies, strategies, tools and techniques of smaller enterprises. About 15% of the course offerings deal with functional aspects of small business such as Financial Management of the Small Firm or Accounting and Management Control for Small Enterprises. The remainder deal with such topics as the Management of Creativity and Innovation and Advising Small Business.

A number of community colleges through their continuing education department, offer training programs developed by other institutions such as the Federal Business Development Bank or the Ontario Management Development Program. For these the developing institution rather than the delivery location is listed in the Directory.

Of the 215 trade associations surveyed sixty three replied. Of these only 28 were conducting educational activities for their members. Very little of the education that is done by trade associations fits the field of study covered by this survey.

On the other hand several non academic institutions are involved in offering an impressive array of instruction in the field of study to existing owner/managers and others not in the post secondary education stream. Chief among these is the Federal Business Development Bank.

While much remains to be done there is also a great deal of Canadian material that has been developed for instructional purposes. While the thirty-five pages of resource material listed in this survey is not all Canadian, neither is it complete. Thus for the instructor who wishes to use solely Canadian research, text, problems and cases in his course this should be possible. Of those 8 books or texts required by more than one course, three were Canadian. That is, Peterson, Small Business: Building a Balanced Economy; Ross, The Risk Takers; and Archer, White, Starting and Managing Your Own Small Firm.

The researcher gratefully acknowledges the cooperation and assistance of all those instructors who unselfishly provided their course descriptions so that other instructors might benefit from their labours. Hopefully the reward of passing on your creation will be the exchange of knowledge this publication provides.

Completion of a task of this magnitude requires a great deal of attention to detail and for this I am grateful to my research assistant, Bryan Coates and our typists Lisette Dubé and Diane Lapalme.

The perception of the need for this project and the willingness to underwrite its completion rests with John Skelton, Small Business Secretariat, Industry, Trade and Commerce. John's encouragement and guidance are important ingredients in the comprehensive nature of this survey.

Kenneth E. Loucks, Ph.D.
Laurentian University
Sudbury, Ontario
September 30, 1979

DIRECTORY OF COURSE OFFERINGS

ALBERTA

Institution: MEDICINE HAT COLLEGE
Department of Business Administration
299 College Drive
MEDICINE HAT, Alberta
T1A 3Y6 (403) 527-7141

Program Responsibility: Rulon Litchfield, Chairman
Business Administration Program.

Nature of Offering: Small Business Management course offered
as an elective in the Business Certificate
Program and in the Business Diploma
Program.

Type and Duration: One semester course.

Competence Level: Business Administration One-Year Certificate
Business Administration Two-Year Diploma

Entrance Requirements: None.

Calendar Description: Business 115 D. McNally
Small Business Management
To inform students about the opportunities
for small businesses; trends including
both advantages and disadvantages of
small businesses; explaining some of the
reasons for a high incidence of failure.
Offers the student an overview of
the following:
a. Environment and management of small
business.
b. Problems in business.
c. Financial and administrative control.
d. Marketing programs.
e. Management and business operations.
f. Legal and government relationships.

Institution: NORTHERN ALBERTA INSTITUTE OF TECHNOLOGY
Department of Business Administration
11762 - 106th Street
EDMONTON, Alberta
T5G 2R1 (403) 477-4111

Program Responsibility: S. Seethram, Head
Business Administration Department

Nature of Offering: Small Business Management course offered
as an elective in the Business
Administration Program.

Type and Duration: One semester course offered during
second year of program.

Competence Level: Diploma in Business Administration.

Entrance Requirements: Students wanting to take this course
are strongly advised to take B200 -
Managerial Accounting.

Calendar Description: BUS 255 G. McLaughlin/R. Crowe
Small Business Management
This course is designed to highlight
to the students the unique differences
between big and small business
management. All functions of business
will be covered and examined in terms
of what special techniques, systems
and procedures are used in small business.
The course is structured to give the
student a practical insight into small
businesses today. This will be achieved
by using resource people now operating
in this area.

Institution: OLDS COLLEGE
OLDS, Alberta
TOM 1P0 (403) 556-8281

Program Responsibility: Chairman, Technology Programs.

Nature of Offering: Small Business Management course offered as an elective in various programs.

Type and Duration: One semester course.

Competence Level: N/A

Entrance Requirements: None.

Calendar Description: Ba 110-3F
Basic Business Management
A course designed to provide information regarding the factors involved in managing a successful small business.

Institution: SOUTHERN ALBERTA INSTITUTE OF TECHNOLOGY
Continuing Education
1301 - 16 Avenue N.W.
CALGARY, Alberta
T2M 0L4 (403) 284-8446

Program Responsibility: R.H. Jewison, Director
Continuing Education

Nature of Offering: Small Business Management course as
non-credit subject offered by the
Continuing Education Department.

Type and Duration: Evening program for 15 weeks.

Competence Level: N/A.

Entrance Requirements: General knowledge of English.

Calendar Description: XADM-011
Small Business Management
This course is for persons contemplating
their own business, or for those persons
who have recently started a new business
(tradesmen, retailers, agents, small
manufacturers, service station operators).
The course is designed to help build
a foundation for a profitable business
operation by covering such subjects as:
business law; bookkeeping; finance;
extending credit; forms of business
ownership and other aspects of administering
the small business.

In addition to the fifteen regular sessions
there will be nine optional learning modules.
There will be for example modules on
Marketing Strategy and Taxation. Students
will be able to disregard those modules
which they believe will be of the least
personal value and to attend lectures
on those modules which they believe
to be of the most benefit. However, in order
to qualify for a subject Certificate the
student must attend four of the nine modules.

The optional modules scheule will be available
at the first night of class. Fee \$95.00.
Textbook cost approximately \$12.00.

Institution: THE UNIVERSITY OF ALBERTA
Faculty of Business Administration and
Commerce
Central Academic Building
EDMONTON, Alberta
T6G 2G1 (403) 432-3111

Program Responsibility: R.S. Smith, Dean
Faculty of Business Administration and
Commerce.

Nature of Offering: Small Business Management course
offered as an elective in the
B.Com. program.

Type and Duration: One semester course offered to
senior B.Com. students.

Competence Level: Bachelor of Commerce.

Entrance Requirements: Successful completion of FIN 304
Business Finance.

Calendar Description: BUS 365
Administration of the Small Business
Issues related to the small business.

Institution: THE UNIVERSITY OF CALGARY
Faculty of Management
2920 24th Avenue, N.W.
CALGARY, Alberta
T2N 1N4

Program Responsibility: George S. Lane, Dean
Faculty of Management

Nature of Offering: Concentration in the area of
Entrepreneurship and Small Business
of the Master Management Studies
Program.

Type and Duration: One semester courses offered during
the final year of the program.

Competence Level: Master of Management Studies

Entrance Requirements: Successful completion of the first
year of the MMS Program.

Calendar Descriptions: ACCT 785
Small Business Financial Information
This course will provide a pragmatic
conceptual basis for the development
and maintenance of financial
decision-making and control systems.
Emphasis will be placed upon systems
and procedures which are sufficiently
flexible to meet the dynamic evolutionary
needs of the small business entrepreneur.

MKTG 785 W. Long
Small Business Development
This course will provide the potential
entrepreneur with basic tools for
determining viable future market needs
and appropriate products for meeting
those needs. This course will cover
such topics as: environmental
forecasting; new product conceptualization;
design and development; and new venture
planning including strategic considerations.

Calendar Descriptions (cont'd.):

OBDN 781

W.E. McMullan

The Nature of Entrepreneurship

The nature, characteristics and functions of the entrepreneur. The role and problems of small business in the Canadian economy.

POEN 783

E. Sugars

Entrepreneurial Problems and Small Business

Case studies of problems faced by owner-managers of small business enterprises: problem analysis, the decision-making process, administration and control, establishment and appraisal of goals and objectives.

Prerequisite: OBDN 781

Institution: THE UNIVERSITY OF LETHBRIDGE
Department of Arts Management
4401 University Drive
LETHBRIDGE, Alberta
T1K 3M4 (403) 329-2111

Program Responsibility: L.G. Hoye, Chairman
Department of Management Arts

Nature of Offering: Small Business Management course as
an elective in the Bachelor of
Management Art Program.

Type and Duration: One semester course open to Senior
Students of the B.M.A. Program.

Competence Level: Bachelor of Management Arts

Entrance Requirements: Permission of the instructor.

Calendar Description: Management Arts 3840 D.W. Balderson
Small Business Management
Theoretical and practical knowledge
to set up and manage a small business:
characteristics and forms of small
business; time management; organize-
purchase franchise decisions; forecasting
and marketing, obtaining financing,
government and legal controls; tax
considerations; accounting and financial
controls; personnel administration;
location decisions.

BRITISH COLUMBIA

Institution: BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY

Business Management Division
3700 Willingdon Avenue
BURNABY, B.C.
V5G 3H2 (604) 434-5734

Program Responsibility: Ernie M. Iannacone, Dean
Business Management Division

Nature of Offerings: Small Business Management courses offered as electives in the part-time Business Management Certificate Program.

Type and Duration: One semester evening courses.

Competence Level: Business Certificate in Administrative Management.

Entrance Requirements: Some exposure to basic business operating practices.

Calendar Descriptions: 10:902 R.W. Vandermark

Small Business Management I

Purpose. This course will assist people planning to embark on a small business venture. This can be either starting a new business or purchasing an existing operation.

Objective. Through developing a new business proposal in class, members of the group should be able to analyse systematically the feasibility of participating in a small business operation.

Outline. The subjects covered by lectures, case studies and general discussions will include prerequisites for success, financing, legal problems, credit, physical facilities, location, and layout planning, etc.

Operational tactics are covered in Part II.

Calendar Descriptions: (Cont'd.)

10:903

R.W. Vandermark

Small Business Management II

Purpose. This course is designed for the manager or owner of a small business and for students who have completed Part I and wish to be exposed to operating techniques before embarking on a new business venture.

Objective. This segment of the two-part course will assist in planning, organizing, directing, and controlling each of the key functional areas of a small business. It is designed to improve the effectiveness of the student in tackling his day-to-day business problems.

Outline. Subjects covered through lecture, case studies, films, and general discussion will include financial control, record-keeping, budgeting, forecasting, product, and inventory control, pricing, sales promotion, staffing, and other functions pertinent to successful business operation.

Institution: CAPILANO COLLEGE
School of Business Management
2055 Purcell Way
NORTH VANCOUVER, B.C.
V7J 3H5 (604) 986-1911

Program Responsibility: Chairman
Business Management Programs.

Nature of Offering: Small Business Management Program.

Type and Duration: One semester course offered during
the evening.

Competence Level: Certificate in Small Business
Management.

Entrance Requirements: None.

Calendar Description: Business Management 210 W.H. LaCoste
Small Business Management
This course offers students a special opportunity to develop skills and concepts in areas of "Small Business Management" where they recognize specific, personal needs. They will learn down-to-earth techniques for dealing with many of the multiplicity of demands placed upon the manager of a small business. Further, there will be a significant opportunity for students to shape the emphasis of this dynamic set of mini-courses. After a three to four session survey of such issues of Small Business Success and Failure, Methods and Forms of Organization, Purchase of Franchises and Going Concerns; topical emphasis will be determined by the class. Topics will be selected from the following areas:

1. Canadian Small Business Management
2. Financial Management for Small Business

Calendar Description: (Cont'd.)

3. Cash Management for Small Business
4. Budgets and the Small Business
5. Credit Granting and the Small Business
6. Your Bank Manager and the Small Business
7. Taxation for Canadian Small Business
8. Commercial Law for Canadian Small Business
9. Government and the Small Business
10. Electronic Data Processing for the Small Business

Institution: CARIBOO COLLEGE
Department of Business Administration
P.O. Box 3010
KAMLOOPS, B.C.
V2C 6B7 (604) 374-0123

Program Responsibility: Sidney H. Spargo, Chairperson
Department of Business Administration

Nature of Offering: Small Business Management course
offered as an elective in the Adminis-
tration Certificate Program, and in
the Business Administration Diploma
Program.

Type and Duration: One semester course offered in the
evening.

Competence Level: Business Administration Certificate
Business Administration Diploma

Entrance Requirements: None.

Calendar Description: Management 252-3 B. Cunliffe
Small Business Management
This course considers the various
aspects of starting up and operating
a small business. Topics to be
covered will include: the qualities
needed to manage, the forms of owner-
ship, location, policies, accounting
records, uses and sources of credit,
controlling credit sales, insurance,
and government regulations, marketing,
and advertising.

Institution: COLLEGE OF NEW CALEDONIA
3330 - 22nd Avenue
PRINCE GEORGE, B.C.
V2N 1P8 (604) 562-2131

Program Responsibility: P. Robinson, Director
Business and Technology

Nature of Offering: Small Business Management offered as
a required course in the Business
Administration Option Program.

Type and Duration: One semester course.

Competence Level: Diploma in Business Administration.

Entrance Requirements: First year standing or instructor's
permission.

Calendar Description: BUS 266-3
Small Business Management
A specialized course dealing with
topics of interest to those involv-
ed in small businesses. Small business
finance, marketing, production, and
personnel problems will be discussed,
as well as special interest areas
such as insurance, time management,
purchasing, receivables management,
and so on. Extensive use of cases
and guest speakers.

Institution: DOUGLAS COLLEGE
Department of Business and Administration
P.O. Box 2503
NEW WESTMINSTER, B.C.
V3L 5B2 (604) 521-4851

Program Responsibility: Chairman
Department of Business and Administration

Nature of Offering: Small Business Management Course
offered as an elective in Business
Management Diploma Program and the
Business Management Certificate Program
(part-time evening study program.)

Type and Duration: One semester course.

Competence Level: Diploma of Associate Arts (Business
Management).
Business Management Certificate

Entrance Requirements: None.

Calendar Description: BUS 111
Small Business Management

For the person who will face the problems
of running a business and of filling
the roles of office manager, stockkeeper,
salesman, and personnel manager. Examines
day-to-day administration and over-all
organization of the business entity
(proprietorship, partnership, limited
company). Offered on sufficient demand.

Institution: FRASER VALLEY COLLEGE
45600 Airport Road
CHILLIWACK, B.C.
V2P 6T4 (604) 792-0025

Program Responsibility: Peter H. Fuhrman, Coordinator
Business Management Programs

Nature of Offering: Option in two year Diploma Programs.

Type and Duration: One semester in the second year.

Competence Level: Two year Diploma.

Entrance Requirements: None.

Calendar Description: Business 407
Small Business Management (3 credits)
A comprehensive course in how to establish and operate a small business. An examination of the current Canadian economic environment within which small businesses must operate; investigating the market; product analysis; product mix; location; and other factors to be considered before the business is actually established. This is followed by studying forms of business ownership; setting objectives; sources of capital; banking; establishing basic accounting and control systems; budgeting; personnel; advertising; insurance; customer credit; and suppliers.

Institution: NORTHERN LIGHTS COLLEGE
Dawson Creek Centre
110401 - 8th Street
DAWSON CREEK, B.C.
V1G 4G2 (604) 782-5251

Program Responsibility: H.E. Gunn, Instructor
Business Administration

Nature of Offering: Small Business Management course
offered as an elective in the
Business Administration Certificate
Program.

Type and Duration: One semester course.

Competence Level: Business Administration Certificate

Entrance Requirements: None.

Calendar Description: Bus 117 H.E. Gunn
Small Business Management
Covers most areas of small business.
Some of the major subject areas
include planning the business, financial
and administrative controls, marketing,
management of operations, and government
legislation at the Federal, Provincial
and Municipal levels. There will also
be a session on how to obtain
assistance from government agencies.

Institution: NORTH ISLAND COLLEGE
156 Manor Drive
COMOX, B.C.
V9N 6P7 (604) 339-5551

Program Responsibility: Roger Hart, Director
Admissions, Records and Counselling

Nature of Offering: Short seminars and workshops as part
of the Small Business Management
Programme.

Type and Duration: Duration of seminars and workshops
varies from one to five days.

Competence Level: N/A.

Entrance Requirements: None.

Calendar Descriptions: SBM 100
Inventory Management in Small Business
This seminar consists of a series of
three-hour modules designed to teach
the principles of inventory management,
and the practical application of these
principles in the participant's own
business. It is particularly suitable
for any business owner or manager who
has a large portion of his total
business assets tied up in inventory
or who has a sizeable material
turnover each year.

SBM 102
Small Business Finance
This is a practical workshop dealing
with the important aspects of
bookkeeping and financing in small
businesses. Each of the four three-hour
modules may be taken independently,
or combined in any manner to cater to
the needs of the participants. This
workshop is intended for anyone involved
in owning or starting a small business.
It assumes that the participant has little
or no experience or training in accounting
fundamentals.

Calendar Descriptions (cont'd.): SBM 106

How to Start a Business

This five-day workshop is designed to facilitate the transition from being an employee to becoming an owner/manager of a viable business enterprise. It covers the legal, financial, and administrative aspects of forming a new business in order to assure the greatest opportunity for future success.

The seminar is part of the College's Small Business Management Program. It provides the essential knowledge required by all potential business owners and should assist individuals assessing the advisability of a business project.

Institution: SIMON FRASER UNIVERSITY
Department of Economics and Commerce
BURNABY, B.C.
V5A 1S6 (604) 291-3708

Program Responsibility: Bertram Schoner, Chairman
Department of Economics and Commerce

Nature of Offering: Seminar in Small Business Management
as an elective in the Bachelor of
Arts and the M.B.A. Programs.

Type and Duration: One semester course offered to fourth
year students majoring in Commerce,
and to senior M.B.A. students.

Competence Level: Bachelor of Arts (Honours)
Master of Business Administration

Entrance Requirements: Undergraduate students must be Commerce
majors with 90 credits hours (fourth
year standing).

Calendar Description: COMM 477.3 R. Vergin
Seminar in Small Business Administration
Emphasis may vary but may include in
any given semester consideration of
small business in the Canadian economy,
career comparisons in small and large
businesses, evaluation of new ventures,
organization, planning, marketing and
financial management.

Institution: UNIVERSITY OF BRITISH COLUMBIA
Faculty of Commerce and Business
Administration
VANCOUVER, B.C.
V6T 1W5 (604) 228-2211

Program Responsibility: Peter A. Lusztig, Dean
Faculty of Commerce and Business
Administration.

Nature of Offering: New Enterprise Development course
offered as an elective in the B.Com.
programme.
Seminar in Small Business is offered
as an elective to M.B.A. students.

Type and Duration: One semester courses offered to
senior students of the B.Com. and
M.B.A. programmes.

Competence Level: Bachelor of Commerce
Master of Business Administration

Entrance Requirements: Undergraduate are required to have
completed 2nd Year of the B.Com.
programme.

Calendar Description: COMM 396
New Enterprise Development (undergraduate)
While most the B.Com. programme
is conducted within the context of
large scale organizations, the
sector comprised of smaller,
independently owned businesses is
of considerable importance. Beyond
being the dominant employer, the
independent business sector is also
a principal source of innovation,
Canadian ownership and managerial
experience.
There are a variety of types of
independent businesses ranging from
corner groceries to high technology
growth firms. The focus of this

Calendar Descriptions: (Cont'd.)

course is on firms in the process of evolving from entrepreneurial aspirations to start-up enterprises and on to medium size viability and perhaps even diversified, multi-national prominence. Little consideration will be given to the static, small, owner-operated firm. Emphasis will instead be placed on the initial entrepreneurial process and the problems that arise from rapid growth and evolution through different phases.

The course will involve some lecture material and readings covering such topics as entrepreneurial planning, sources of funding, bureaucratic tasks in start-up (including incorporation and tax considerations), economies of scale, franchising, stages of growth, and purchasing or selling an independent business. Some successful entrepreneurs from the Lower Mainland will be invited as guest speakers.

Written assignments will include a series of exercises concerning the design and start-up of a new enterprise, and a course project which may be a feasibility study for a particular entrepreneurial opportunity or the investigation of a topic relevant to the development of dynamic small firms. Evaluation will be based primarily on the project and an in class examination.

COMM 589

(MBA)

Seminar in Small Business Policy and Management.

This seminar addresses the particular problems and experiences encountered in starting, developing and managing small businesses. The course includes lectures, guest speakers, written cases, and "live" cases based on studies of local independent businesses.

Institution: VANCOUVER COMMUNITY COLLEGE, LANGARA
Business Administration Department
100 West 49th Avenue
VANCOUVER, B.C.
V5Y 2Z6 (604) 324-5221/324-5511

Program Responsibility: G.E. Witter, Chairman
Business Administration Department

Nature of Offering: Small Business Development Program
as a full time, one-year certificate
program.

Type and Duration: One year (three terms) full time program.

Competence Level: Certificate in Small Business Development

Entrance Requirements: Small business experience coupled with
a marketable skill or feasible new
venture idea is desirable.

Calendar Descriptions: Business 115
Starting a Small Business
An introduction to the relevant
aspects of setting up a small business.
This includes: form of ownership,
basic market research, determination
of marketing and personnel policies,
budgeting, government regulations,
financing, purchasing, promotion,
bankruptcy and consulting services.
Emphasis will be on a practical approach;
case studies will be used.

Business 218
Operating a Small Business
A continuation of Small Business
115 covering all aspects of operating
a small business, especially during
the "survival" stage. Topics include
bookkeeping, payroll, performance
measurement, marketing, merchandising,
purchasing, sales, advertising, store
layout and governmental paper work.

Calendar Descriptions (cont'd.):

Emphasis will be on how to practically apply knowledge to operate a small business. Small businessmen will be used as resource instructors and students will be exposed to simulation games, case studies and short-run business ventures.

Prerequisite: Small Business 115

Business 318

Co-operative Education Internship

Approved 'On-the-Job' Co-operative work placements in Small Businesses. As an alternative, students may elect either to start and run their own business ventures or to work with a Small Business Counsellor. In addition, there will be weekly seminars.
Prerequisites: Small Business 115 & 218.

MANITOBA



Institution: ASSINIBOINE COMMUNITY COLLEGE
1430 Victoria Avenue East
P.O. Box 935
BRANDON, Manitoba
R7A 5Z9 (204) 725-4530

Program Responsibility: John E. Stonehouse, Chairman
Business and Applied Arts Department
G. Ross Playter, Senior Instructor
Administrative Studies

Nature of Offerings: Required courses involving the preparation and defence of a feasibility study for completion of the Business Administration program requirements.

Type and Duration: One term courses during second year of program.

Competence Level: Diploma in Applied Arts - Business Administration.

Entrance Requirements: Successful completion of previous 4 terms.

Calendar Description: A01-X530 Business Seminar G. Ross Playter
Instruction in the preparation of the comprehensive business probe (A01-X600) to be presented in term 6.
A01-X600 Business Seminar G. Ross Playter
A formal defence of a feasibility study before an examining board. Involves the synthesis of accounting, finance, production, marketing research, sales and advertising, personnel and law in formal report format.

NEW BRUNSWICK

Institution: University of Moncton
Faculty of Administration
Moncton Campus
Moncton, New Brunswick
E1A 3E9

Program Head: Normand Roy, Dean
Faculty of Administration

Type of course: Electives in SME management are offered in the BBA, BAS, B Comm (adult education), and MBA programs.

Duration: One semester.

Program: Bachelor of Business Administration
Bachelor of Administrative Sciences
Bachelor of Commerce (adult education program)
Master of Business Administration (MBA)

Prerequisites: Prerequisites for the first-level course in SME management are Principles of Management II (AD-2211) and Principles of Marketing (AD-2312). The prerequisite for the SME course in the MBA program is Management (AD-6211).

Calendar descriptions: AD-3211
Small and Medium Enterprises
The importance of SME in the Canadian economy. The entrepreneur. Starting a small business. The problems and advantages of a small business. Internal and external resources. Management and marketing in the SME. Legal matters and relations with governments. Production. Franchises. Financing and risk management. The future: will the role of SMEs change?

Calendar descriptions:
(continued)

AD-3364

Marketing in the SME

Marketing problems for the SME. Introducing a new product. Brand names and packaging. Location and interior design. Transport options for the SME. Media options for advertising and the advertising budget. How to use public relations. Promotion at the place of sale. Price-setting in a services business. Sources of help in marketing for the entrepreneur.

AD-6213

Administration of Small and Medium Enterprises

Analysis of the special administrative problems of the small business: structure, decision-making, growth. The influence of environmental constraints. Co-ordinating manufacturing, financial, and commercial activities. The family business and problems of administrative succession.

Institution: UNIVERSITY OF NEW BRUNSWICK (FREDERICTON)

School of Administration
College Hill, Box 4400
FREDERICTON, N.B.
E3B 5A3 (506) 453-4995

Program Responsibility: H. A. Sharp, Director
School of Administration

Nature of Offering: Entrepreneurship course offered to senior students as an elective in the Bachelor of Business Administration.

Type and Duration: Full year course open to senior students.

Competence Level: Bachelor of Business Administration.

Entrance Requirements: Permission from the instructor.

Calendar Description: BA 4100 R. Darling
Management of New Enterprises

The first term involves case studies of actual new enterprise successes and failures. In second term students prepare and present proposals for new business ventures or do case studies of actual new business enterprises. In the latter case the business people concerned frequently participate in the classroom discussion of interest to individuals who want to start or to purchase a business of their own.

Institution: UNIVERSITY OF NEW BRUNSWICK - (SAINT-JOHN)
Tucker Park, Box 5050
Saint-John, N.B.
E2L 4L5 (506) 657-7310

Program Responsibility: M. Garry Davis, Chairman
Division of Administration

Nature of Offerings: Courses in the Small Business and
Entrepreneurship area as electives in
the Bachelor of Business Administration
program.

Type and Duration: One semester course and one full year
course open to senior students.

Competence Level: Bachelor of Business Administration.

Entrance Requirements: Consent of the instructor.

Calendar Description: BA 3147. Small Business Management
Concentrates on issues relating to the
management, as opposed to the creation,
of a small business. The approach is
from the perspective of a person taking
over or operating an existing business,
starting a franchise operation, or wishing
to implement management techniques in a
recently established business. The course
is case oriented.

BA 4100. Management of New Enterprises
The first term involves case studies of
actual new enterprise successes and
failures. In second term students prepare
and present proposals for new business
ventures or do case studies of actual new
business enterprises. In the latter case
the business people concerned frequently
participate in the classroom discussion of
interest to individuals who want to start
or to purchase a business of their own.

NEWFOUNDLAND

Institution: MEMORIAL UNIVERSITY OF NEWFOUNDLAND
P.J. Gardiner Institute for Small Business
Studies
School of Business Administration and Commerce
ST. JOHN'S, Newfoundland
A1B 3X5 (709) 753-1200

Program Responsibility: G.A. Pynn, Director
P.J. Gardiner Institute for Small Business
Studies

Nature of Offering: Small Business Management course offered as
an elective in the B. Com program and the
MBA program.

Type and Duration: One semester course during the last term of
the undergraduate program and the second
year of the MBA program.

Competence Level: Bachelor of Commerce
Master of Business Administration

Entrance Requirements: Undergraduate students are expected to
have successfully completed the previous
6 study terms. Graduate students should
have completed first year of their program.

Calendar Description: Business 7030 G.A. Pynn
B 9308 (MBA) Management of Small Business

This course is designed to introduce the student to the challenges of managing small businesses. Significant use will be made of examples from the Newfoundland environment. The course will concentrate on Canadian cases which have been developed to stimulate the student to analyze the opportunities, risks and factors associated with the successful establishment and operation of small enterprises.

NOVA SCOTIA

Institution:

DALHOUSIE UNIVERSITY

School of Business Administration
HALIFAX, N.S.
B3H 4HB (902) 424-2211

Program Responsibility:

John H. Scheibelhut, Director
School of Business Administration

Nature of Offerings:

Two half-courses offered as electives
in the Bachelor of Commerce program.
The School also offers a survey course
for noncommerce students in Small
Business Management.

Type and Duration:

One semester courses during senior
years of the programs.

Competence Level:

Bachelor of Commerce

Entrance Requirements:

For B.Com. electives, students must
have studied introductory courses in
Accounting, Finance and Marketing.
Consent of the instructor is also
required.

Calendar Descriptions:

Commerce 305 A/B

Small Business Management

This class uses written and oral cases
to adapt and apply business principles
to specific current small-business
situations. Students are expected to
review and supplement their knowledge
of basic business functions, to find
and analyze pertinent materials in
libraries and from other sources, and to
organize and integrate relevant materials
and business principles into workable
recommendations for managing a variety
of small businesses.

Prerequisites: Commerce 103B, Commerce 207A/B,
Commerce 108A/B, or permission of the
instructor.

Calendar Descriptions cont'd.:

Commerce 306B

Survey of Business Processes and
Retail Management

This class is designed as a survey for noncommerce students who wish to have an overview of the management problems facing the operator of a retail or service business. Although primarily designed for Pharmacy students, this course is open to Arts and Science students who have had no previous Commerce classes. Commerce 305A is the course available for Commerce students who are interested in this topic. Students may offer for credit only one of Commerce 305A/B and 306B.

Commerce 434A/B

Managing Technological Entrepreneurship

High technology based industries face unique management problems imposed by the rapid rate of technological change and the often uncertain environmental impacts of technological innovations. This course examines some of the techniques (such as technological forecasting and technology assessment) that have recently been developed to improve management effectiveness in high technology organizations and its responsiveness to environmental concerns. Prerequisites: Required core area classes, except Commerce 311, and/or consent of instructor.

Institution: NOVA SCOTIA INSTITUTE OF TECHNOLOGY
P.O. Box 2210
Leeds Street
HALIFAX, Nova Scotia
B3J 3C4 (902) 454-7451

Program Responsibility: Mr. Frank E. Milne, Vice-Principal
Extension Services

Nature of Offering: Small business management course offered
by the Continuing Education Department.

Type and Duration: Evening: 12 weeks.

Entrance Requirements: None

Calendar Description: Small Business Management
This 12-week course is designed to help improve the managerial skills of the small business manager by exposing him to professional management concepts. Lectures, seminars and case analysis will be used to develop these management skills.

Topics to be covered include:

- Budget and internal control
- Effective generation and use of accounting information
- Raising capital
- Break-even analysis
- Cash management
- Sales policy and pricing
- Sales record analysis
- Sales planning
- Government consideration in small business
- Insurance in business
- Management information systems
- Expansion
- Internal and external communication
- Special considerations for doing business in Atlantic Canada

The course will be held one night a week from 7-9 p.m. commencing and will run for twelve weeks.
Course fee will be \$20.00

Institution: ST. FRANCIS XAVIER UNIVERSITY
ANTIGONISH, Nova Scotia
B2G 1C0 (902) 863-3300

Program Responsibility: L. T. Gallant, C.A., Chairman
Business Administration Department

Nature of Offering: Small Business Management offered
as an elective in the Bachelor of
Business Administration Program.

Type and Duration: One semester course during the fourth
year of the program.

Competence Level: Bachelor of Business Administration

Entrance Requirements: Students are expected to have completed
the previous 3 years of the program.

Calendar Description: Business Admin. 456 F. Fisher
Small Business Management
Examines problems faced by the new
business enterprise and the entrepreneur.
Studies both the existing (small) business
wishing to expand and the development of
a new business from its conception.
Three credits.

Institution: SAINT MARY'S UNIVERSITY
Faculty of Commerce
HALIFAX, Nova Scotia
B3H 3C3 (902) 422-7331

Program Responsibility: Samuel H. Jopling, Dean
Faculty of Commerce

Nature of Offerings: Small Business Management courses
offered as electives in the Honours
Bachelor of Commerce Program and the
Master of Business Administration
Program.

Type and Duration: One semester courses offered to senior
students of the H.B. Com. and M.B.A.
programs.

Competence Level: Honours Bachelor of Commerce
Master of Business Administration

Entrance Requirements: Undergraduate students are required
to have taken Business Finance II
(361.1 (2) and Introduction to
Marketing (370.2 (2)).
Successful completion of the first
year is required for the M.B.A. Small
Business offering.

Calendar Descriptions: 487.1 (.2)
Small Business Management
The objective of the course is to
stimulate informed interest in creat-
ing and managing a small business:
the course includes the investigation
of new business opportunities, capital
requirements and sources, information
systems, marketing and tax considerations.

Calendar Descriptions: (Cont'd.) MBA 687.1 (.2) J. Chamard

Small Business Management

This half course stimulates students to identify, evaluate and plan for a small business opportunity in Atlantic Canada (or elsewhere).

Prerequisite: first year of MBA program.

ONTARIO

Institution: CAMBRIAN COLLEGE OF APPLIED ARTS
AND TECHNOLOGY

Business Department
1400 Barrydowne Road
Sudbury, Ontario
P3A 3V8 (705) 566-8101

Program Responsibility: W. Fraser Wilson, Chairman
Business Department

Nature of Offering: Small Business Management course
offered in the Business Administra-
tion Program.

Type and Duration: One semester course offered during
the Sixth Semester of the Business
Administration study program.

Competence Level: Diploma in Business Administration.

Entrance Requirements: None.

Calendar Description; BUS 3098-3

Small Business Management

An introduction to the problems, risks
and rewards of owning a small business.
Means of investigating opportunities,
competition and operating methods are
reviewed. Common errors and govern-
ment regulations are pointed out.

Institution: CANADORE COLLEGE OF APPLIED ARTS AND TECHNOLOGY
P.O. Box 5001
NORTH BAY, Ontario
P1B 8K9 (705) 474-7600

Program Responsibility: Kenneth R. Rudderham, C.A., Chairman
Department of Business

Nature of Offering: Small Business Management Course
offered as a required subject in the
General Business Program and as an
elective in the Marketing Program.

Type and Duration: One semester course.

Competence Level: Diploma of General Business (two-year).
Diploma of Business--Major in Marketing
(three-year).

Entrance Requirements: None.

Calendar Description: BUS 221-4
Small Business Management
The student will investigate the sources
of financing, and analyze credit and
collections. He will learn the focus
of business organization, accounting
controls, personnel administration,
retailing principles, layout and site
selection.

Institution:

CARLETON UNIVERSITY

School of Commerce
Colonel By Drive
OTTAWA, Ontario
K1S 5B6 (613) 231-4321

Program Responsibility:

J.B. Waugh, Director
School of Commerce

Nature of Offering:

Small Business Management course
offered as an elective in the Bachelor
of Commerce program.

Type and Duration:

One semester course offered to
Senior Students.

Competence Level:

Bachelor of Commerce

Entrance Requirements:

Successful completion of introductory
courses in Marketing and Finance.

Calendar Description:

Management Studies 42.360 P. Downing

Small Business Management

This course deals with the socio-economic
functions and activities of the
owner-manager entrepreneur and examines
the operations and nature of small
businesses. Methods and models which
are useful in the analysis of a small
business enterprise are employed.

Institution: THE CONFEDERATION COLLEGE OF APPLIED
ARTS AND TECHNOLOGY

Business Division
P.O. Box 398
THUNDER BAY, Ontario
P7C 4W1 (807) 577-5751

Program Responsibility: Roy V. Murray, Dean
Business Division

Nature of Offering: One semester course in a four semester
General Business Diploma Program.

Type and Duration: Fours hours per week during second
semester.

Competence Level: Diploma in General Business.

Entrance Requirements: None.

Calendar Description: GB 212

Small Business Management

Explores all aspects of business
from the point of view of the small
entrepreneur.

Institution: DURHAM COLLEGE OF APPLIED ARTS
AND TECHNOLOGY
P.O. Box 385
OSHAWA, Ontario
L1H 7L7 (416) 576-0210

Program Responsibility: A.F. Haywood, Director
Business Division

Nature of Offering: Starting and Operating A Business
offered by the Continuing Education
Department.

Type and Duration: Evening course with a duration of
20 hours.

Competence Level: N/A

Entrance Requirements: None.

Calendar Descriptions: 272-12-OB
Starting and Operating a Business
The purpose of this course is to
assist the prospective businessman
with his problems in the area of
starting a business. The course
will enable participants to deal
intelligently and decisively with
business matters, and help them
avoid needless mistakes and errors
of judgement.
Cost: \$50.

Institution: FANSHAWE COLLEGE OF APPLIED ARTS AND TECHNOLOGY
P.O. Box 4005
Terminal C
LONDON, Ontario
N5W 5H1 (519) 452-4100

Program Responsibility: J.D. Tomlinson, Dean
Faculty of Business

H.W. Pickett, C.A., Chairman
Business Administration

Nature of Offering: Small Business Management course offered
as an elective in the Business Administration
Program.

Type and Duration: One semester course.

Competence Level: Diploma in Business Administration.

Entrance Requirements: None.

Calendar Description: MGMT 501 M.J. Hennessy

Small Business Management

A course to help students understand
problems related to the management of
a small business through a study of:
Types of small businesses, Ownership
planning, Appraising a going concern,
and Organizing and administering a
business.

Institution: GEORGIAN COLLEGE OF APPLIED ARTS AND TECHNOLOGY

Business Division
401 Duckworth Street
BARRIE, Ontario
L4M 3X9 (705) 728-1951

Program Responsibility: R.M. Gilbert, Co-ordinator
Business Administration and General Business

Nature of Offering: Small Shop Management offered as an elective in the Business Administration Program.

Type and Duration: Two semester course.

Competence Level: Diploma in Business Administration

Entrance Requirements: Successful completion of Retail Mathematics (MAT 1101)

Calendar Descriptions: MAN 1202

Small Shop Management

This two semester course will provide students with the basic knowledge and skills required to manage a small store or to open their own retail business. Included in the course of study are location and layout of your store, merchandise planning and control, sales promotion techniques and personnel management as it applies to the small store.

Prerequisite: Retail Mathematics (MAT 1101)

Institution: HUMBER COLLEGE OF APPLIED ARTS AND TECHNOLOGY

North Campus
Humber College Blvd.
REXDALE, Ontario
M9W 5L7 (416) 675-3111

Program Responsibility: John Liphardt
Business Department

Nature of Offering: Courses offered as electives in the
Business Programs. The institution also
offers a Small Business Management Course
in their Enquire Studies Program.

Type and Duration: One semester courses.

Competence Level: Business Diploma or Certificate.

Entrance Requirements: None.

Calendar Descriptions: 240-011 S. Shaw/R. Caco

Starting a New Business.

The objective of this course is to enlighten the prospective entrepreneur on how to start up a business. Secondly, to familiarize students with the basic parts of a small business - and how they interact and reinforce each other to form a dynamic whole. Thirdly the course will encourage students to develop the habit of thinking analytically and deal decisively with operational problems.

247-010 Joan T. Rutherford

Retailing - Small Store Proprietorship

The purpose of this course is to provide for the student a practical awareness of today's retailing scene, particularly as it pertains to the small independent store. It is also designed to develop learning skills in decision-making creative research, merchandising judgement, planning, analysis, and calculations.

Calendar Descriptions cont'd.:

251-015

S. Shaw/R. Caco

Small Business Management (Equine Studies)

This course has been prepared for students who will be working in one of the various businesses associated with the equine industry. Most such operations are small to medium sized and there are many opportunities for eventually owning one's own business or running a business for investors.

Institution: LAURENTIAN UNIVERSITY
School of Commerce
SUDBURY, Ontario
P3E 2C6 (705) 675-1151

Program Responsibility: David J. Hilldrup, Director
School of Commerce and Administration

Nature of Offerings: Courses in Small Business and
Entrepreneurship as electives in
Honours B. Com. program.

Type & Duration: One semester courses during the fourth
year of the program.

Competence Level: Honours Bachelor of Commerce

Entrance Requirements: Completion of previous 3 years of B. Com.
program.

Calendar Descriptions: COMM 4037 E K. E. Loucks
Management of Small Enterprises:
Operating Problems and Strategies

This course is designed to enable students
considering careers either in or dealing
with small firms to examine realistically
the characteristics, opportunities, and
risks of this segment of industry. Cases
dealing with a variety of operating
problems at different stages of the life
cycle of a small enterprise, as well as
with longer range matters such as defining
the appropriate market niche and growth
strategy, financing, building a management
team, and planning the future of the
enterprise, comprise the principal focus
of the course.

Calendar Descriptions:(cont'd.)

COMM 4046 E

K. E. Loucks

Entrepreneurship

This course focuses on the role of the entrepreneur in business society and includes an analysis of the individual entrepreneur and the nature and problems of establishment of new business enterprises. The course is primarily for students who are considering the possibility of an entrepreneurial career as a primary career choice or as an alternative to employment in a larger firm. The course will consider the characteristics of the successful entrepreneur, methods of identifying new opportunity areas, starting a new enterprise, tax and legal aspects of new business and financing for initial capital and for growth.

COMM 4047 E

K. E. Loucks

Venture Initiation

This course is a seminar the major content of which is a venture design project in which students prepare a new business prospectus. Each member of the seminar, working by themselves or in small groups of 2 or 3 persons is expected to think of a product or service which they believe to be marketable and then devise the plans to put the idea into practice. Each student or group is expected to devise the strategy to get a new company off and going and then to describe this strategy in a written report of 50 to 100 pages. This course is intended for students who have successfully completed COMM 4046 and have decided on pursuing an entrepreneurial career.

Institution: MOHAWK COLLEGE OF APPLIED ARTS AND TECHNOLOGY

Business Department
Fennell Avenue and West 5th
P.O. Box 2034
HAMILTON, Ontario
L8N 3T2 (416) 389-4461

Program Responsibility: W.J. Stoddart, Head
Business Administration Program

Nature of Offering: Small Business Management Course offered as an elective in the Three Year Business Administration Program.

Type and Duration: One semester course.

Competence Level: Diploma in Business Administration

Entrance Requirements: None.

Calendar Description. BA
Small Business Management
No description available.

Institution: QUEEN'S UNIVERSITY
School of Business
KINGSTON, Ontario
K7L 2M3 (613) 547-2675

Program Responsibility: Dr. J.R.M. Gordon, Dean
School of Business

Nature of Offering: Course in the Entrepreneurship area
as an elective in the MBA Program.

Type and Duration: One semester course during final year
of the program.

Competence Level: Master of Business Administration

Entrance Requirements: Successful completion of the first
year of the MBA Program.

Calendar Description: 13-991 - The Management of New Enterprise
The focus of this course is on the development of new business ventures rather than on the operation of an existing business. The key activity in the course is the development of a business plan which could be used to raise capital. Individuals or small teams are required to define a business concept which is of interest to them and which they might actually pursue following graduation. This concept is to be fully developed, information gathered and economic analyses completed to the level that it could be presented to a group of venture capitalists and/or interested backers. In addition to the field project a number of case studies describing new business ventures will be examined. Source materials describing the business environment in Canada relating to new ventures will also be part of the formal structure. Finally a number of guest speakers will be involved in the course to provide their actual experiences in the area of starting their own business.

Institution: RYERSON POLYTECHNICAL INSTITUTE
50 Gould Street
TORONTO, Ontario
M5B 1E8

Program Responsibility: Raymond W.Y. Kao, Co-ordinator
Management Studies

Nature of Offerings: Courses offered as part of the Business
Administration Diploma - Management
and Enterprise Development Option.

Type and Duration: One semester courses offered during
fourth, fifth, and sixth semesters of
the program.

Competence Level: Diploma (Business Administration)

Entrance Requirements: Students should have completed
introductory courses in Finance,
Marketing and Operations Management.
Admission requirements for Business
Valuation also include an introductory
accounting course.

Calendar Descriptions: FIN 521 R.J. Sherk
Finance: Business Valuation
The basic objective of the course is
to provide students with the challenges
of small business ownership in
manufacturing and service industries.
Although public programmes aimed at
stimulating small business growth and
the participation of small and medium
enterprises in local and export markets
will be discussed, the emphasis will
be placed on the topic of valuation
of private company shares and assets.
Cases would be used to examine value
related earning power and the importance
of tangible asset support. Students
are also required to engage in field
work involving an in-depth analysis
of a small Canadian owned business
and the special circumstances
applicable to the determination of
value.
Prerequisites: MKT 301, FIN 301,
ACC 301 and MGT 401.

Calendar Descriptions (cont'd.):

MGT 044

R.W.Y. Kao

Management: Entrepreneurial Seminar

The basic objective of the seminar is to assist students in opportunity recognition, hence, enhancing students enthusiasm and curiosity and eventually leading them into starting their own ventures. The method used for the program stresses learning-by-doing self-paced experimental techniques covering venture gestation and the decision to launch a business. As integral parts of the program, students are also required to participate in the activities of the Small and Medium Enterprise Development Centre. Those who do not wish to be self-starters are discouraged from taking the course. Prerequisites: None, other than: admission prerequisites. (two credits).

MGT 526

R.W.Y. Kao

Management: Enterprise Development I
(Small Business Management)

The course is designed for all students with an interest in small and medium enterprise development. It will also be of value to those who do not contemplate small business ownership, but are concerned about the "welfare" of small businesses.

Topics include venture formations and the formulation of continuing operation policies in marketing, production, finance, human resources, organization, product or service development and the supervision of the changes required in the strategy through the various stages of company growth.

The combination of case and lecture-discussion methods will be used, although students are encouraged to be engaged in field studies relating to small business operation problems. Prerequisites: MKT 301, FIN 301, and MGT 401.

Calendar Descriptions (cont'd.):

MGT 527

R.W.Y. Kao

Management: Enterprise Development II
(Small Business and the Government)

As a part of the Enterprise Development Programme, this course is designed to acquaint students with various government programmes as a form of small business aid and with ways and means to do business with the government. Methods of learning will be concentrated on learning by doing, though cases will be used. There will also be lectures and discussions examining various government programmes for their effectiveness in achieving objectives. Where necessary, students will also be required to make direct contact with government officials or agencies. Prerequisites: MKT 301, FIN 301, and MGT 401.

Institution: ST. CLAIR COLLEGE OF APPLIED ARTS
AND TECHNOLOGY
200 Talbot Road West
WINDSOR, Ontario
N9A 6S4 (519) 966-1656

Program Responsibility: D.L. Grant, Chairperson
Business Programs

Nature of Offering: Small Business Management course in
the Marketing Option of the General
Business Diploma Program.

Type and Duration: One semester course offered during
the last year of the program.

Competence Level: General Business Diploma.

Entrance Requirements: Successful completion of MA 200 -
Basic Marketing 2.

Calendar Description: BU 460
Small Business Management
A study of the management of small
business proprietorships with emphasis
on developing management policy,
financing and sales promotion.

Institution: ST. LAWRENCE COLLEGE
Business Department
Portsmouth Avenue
KINGSTON, Ontario
K7L 5A6 (613) 544-5400

Program Responsibility: Community Learning Coordinator
Business Department

Nature of Offering: Small Business Management is offered as an elective in the Business Certificate Program. This eight subject program is designed to meet the needs of Community Learning students wishing to pursue a course of study in the field of business in a short time.

Type and Duration: One semester evening course.

Competence Level: Business Certificate

Entrance Requirements: Although students are not required to complete the program subjects in a specific sequence, it is recommended that students complete the required core courses (Accounting, Law, Marketing, Programming, and Organizational Behaviour) prior to enrolling in elective courses.

Calendar Description: BU 10 D.B. Stoness
Small Business Management
This fast moving course is designed to provide the student with concrete skills relevant to the operation of a small business enterprise. The course focuses attention on management techniques; marketing strategy and simple financial analysis. Lectures, films, guest speakers and discussion create a lively forum for learning.

Institution: SENECA COLLEGE OF APPLIED ART AND TECHNOLOGY

Continuing Education Division
1750 Finch Avenue East
Willowdale, Ontario
M2J 2X5 (416) 491-5050

Program Responsibility: Jack Glazbrook, Director
Business, Computer & Secretarial
Studies.

Nature of Offerings: Small Business Management courses offered by the Continuing Education Division.

Type and Duration: Evening session of three hours for period ranging from 4 to 6 weeks. (one session/week).

Competence Level: N/A

Entrance Requirements: None.

Calendar Descriptions: Financing A Business (4 sessions)

For the small business owner or manager - whether you're starting up, expanding, surviving or maybe in a little trouble. Sources of finance for a small business and ways to make these sources work for your business. Practical financial approaches to the establishment of new businesses and the development of existing businesses with survival techniques for all small businesses. Selected topics: how long do you need the money?; costs of money; sources of short term, term and long term financing; good bank relations; good creditor relations; trade credit as a source of financing; how to put your best foot forward to credit agencies; delaying tactics; a quick review of the Bankruptcy Act.

Calendar Description (cont'd.)

Marketing And The Smaller Company
(8 sessions)

For owners of smaller businesses in the retail, wholesale, manufacturing or service sector. Recommended also to anyone who is thinking about going into business. You learn to shift your thinking from "selling" (getting rid of what you already have) to "marketing" (having available the goods or services which people want to buy today). Marketing techniques borrowed from the big corporations are adapted in this mini course to the needs of the smaller company.

Selected topics: assessing your market; your product - or your service; pricing and distribution; promotion and selling; the independent retailer in the seventies; why small is beautiful; beating your big competitors.

Problem Solving and Profit Improving
For Small Businesses (8 sessions)

Business is never easy, especially during tough economic times. Yet there are many fundamental, easy-to-implement and inexpensive changes that can be made to improve business performance. This mini course focuses on the most important business areas, offering practical strategies for solving business problems and improving profits. Also, there will be an opportunity to discuss your particular situation with the course leader.

Selected topics: problem solving: a valuable technique; evaluating performance; time management; how to deal with suppliers; creditor and collection practices; perking up sales; inventory management; your friend the banker; motivation of your employees.

Calendar Description (cont'd.)

Starting Your Own Business (6 sessions)

For anyone who has ever thought of starting a business or already owns a business. Business experience is not essential, but will be helpful. Some of the problems of becoming your own boss ... and some of the benefits. The proper form of entity, the cheapest means of starting a business, coupled with anecdotes from other business situations, should make this mini course interesting and even vital to those who own a small business or are starting one up ... or even thinking about it. This course has no magic solutions or guaranteed procedure for success. But it will cover areas and share experiences that a budding entrepreneur should consider. Selected topics: philosophy to survive; best legal organization - incorporation; pitfalls before you begin; conservatism; how to test your product line or service; cash flow planning; how to deal with the bank; basic insurance.

Institution: SHERIDAN COLLEGE OF APPLIED ARTS AND TECHNOLOGY

School of Business and Secretarial Studies
Trafalgar Road
OAKVILLE, Ontario
L6V 1G6 (416) 845-9430

McLaughlin Road
Box 7500
BRAMPTON, Ontario
L6V 1G6 (416) 364-7491

Program Responsibility: G.F. Serenas, Chairman
Business Studies - Oakville

J.A. Holland, Director
Applied Arts - Brampton

Nature of Offering: Small Business Management courses offered as an elective in the three-years Business Administration Program.

Type and Duration: One semester courses.

Competence Level: Diploma in Business Administration

Entrance Requirements: None.

Calendar Descriptions: SBM 2301 (PART I)

Small Business Management

This course has been developed in cooperation with a number of experts in various fields of Small Business Management. This first part covers developmental aspects, self-analysis, locational analysis, financing, personnel, employee relations, legal requirements, sales and marketing and tax requirements.

SBM 2301 (PART II)

Small Business Management
(No description available)

Institution: SIR SANDFORD FLEMING COLLEGE OF
APPLIED ARTS AND TECHNOLOGY

Business Studies Department
PETERBOROUGH, Ontario
K9J 7B1 (705) 743-5610

Program Responsibility: J.G. Dagg, Chairman
Business Studies Department.

Nature of Offering: Small Business Management courses as
electives in the Business programs
and as required subjects in other
departments.

Type and Duration: Full year course.

Competence Level: N/A

Entrance Requirements: None.

Calendar Descriptions: 235006 T.C. Jenkins

Small Business Management

This is a study of business organization
and law as related to small business
with particular reference to the marine
and powered leisure equipment industry.
Topics will include credits and col-
lections, business financing, business
systems, labour law and labour
standards, human resources management
and supervisory techniques, taxation,
governmental regulations. This course
continues for two semesters.

477106 T.C. Jenkins

Small Business Management

A study of basic management principles
in small businesses. Considers the
law as related to small businesses.
Topics include credits and collections,
business financing, business systems,
labour law and labour standards,
human resources, management and
supervisor techniques, taxation govern-
ment regulations.

Institution: UNIVERSITY OF TORONTO
Faculty of Management Studies
246 Bloor Street West
TORONTO, Ontario
M5S 1V4
Department of Chemical Engineering
Wallberg Building
University of Toronto
TORONTO, Ontario

Program Responsibility: Max B.E. Clarkson, Dean
Faculty of Management Studies
Chairman,
Department of Chemical Engineering

Nature of Offering: Entrepreneurship and Small Business
Management course offered as an
elective in the M.B.A. Program.
The faculty of Applied Science and
Engineering offers "Innovation and
Entrepreneurship for Chemical Engine-
ers" as an elective in the engineering
program.

Type and Duration: One semester courses offered to senior
students of the programs.

Competence Level: Master of Business Administration
Bachelor of Applied Science

Entrance Requirements: M.B.A. students are expected to have
completed the first year of the program.
Engineering students are required to
have successfully completed "Economic
Evaluation of Process Industries"
(CHE 456F).

Calendar Descriptions:

MBA 2001

A.J. Szonyi

Entrepreneurship and the Management of
the Smaller Company

The purpose of this course is to give the students some insights into the scope of smaller company operations in our economy, entrepreneurship, the role and characteristics of the entrepreneur, venture formation, and the development of the unique management skills necessary for the management of smaller business.

CHE 4575

A.J. Szonyi

Innovation and Entrepreneurship for
Chemical Engineers

The course is intended to give the students an understanding of small chemically-oriented business enterprises to introduce skills needed to run a small business. The mechanics of launching a new small enterprise and its technical, economical, legal and financial aspects will be discussed. Case histories in the chemical and process industries will be presented. Enrolment limited.

Institution: UNIVERSITY OF WATERLOO
WATERLOO, Ontario
N2L 3G1 (519) 885-1211

Program Responsibility: Dr. E. Rhodes, Chairman
Department of Chemical Engineering

Nature of Offering: Course in Entrepreneurship offered
as an elective in the undergraduate
and graduate Chemical Engineering
programs.

Type and Duration: One semester course during senior year
of undergraduate program. Course is
also open to graduate Chemical Engineering
students.

Competence Level: Bachelor of Applied Science
Master of Applied Science

Entrance Requirements: Successful completion of Engineering
Economics (Ch E 442)

Course Description: Ch E 501 D.S. Scott
The Chemical Engineer as an Entrepreneur
How an individual engineer may develop
a new small business to supply goods or
services to Canadian chemical industries,
while performing his/her own technical
and management functions; technical,
economic, legal and financial aspects.

Institution:

UNIVERSITY OF WESTERN ONTARIO

School of Business Administration
LONDON, Ontario
N6A 3K7

Program Responsibility:

C.B. Johnston, Dean
School of Business Administration

Nature of Offering:

New Enterprise Management course offered as an elective in the Honours Bachelor Administration program and the Master of Business Administration program.

Type and Duration:

One semester course offered during the final year of the H.B.A. and MBA programs.

Competence Level:

Honours Bachelor of Administration
Master of Business Administration

Entrance Requirements:

Undergraduate students are expected to have completed the third year of the H.B.A. program. Successful completion of the first year is required for MBA students.

Calendar Description:

442/629

R.M. Knight

New Enterprise Management

The focus of this course is on the development of new business ventures, as well as on the operation or management of a small business. Cases have been developed to stimulate the student to analyze the opportunities, risks and factors necessary for the success of the entrepreneur and his new enterprise.

Calendar Description (cont'd.)

Through case discussions and a project on starting and investing in a new enterprise, the student will develop skills in assessing suitable opportunities, evaluating profit potential and raising capital for the new business. The theme of the course is the development of a business plan to start a new business which could be used to raise capital for the business.

Cases used in the course are developed from actual Canadian business situations, both successful and unsuccessful. Students are required to advise the entrepreneur in the case whether to start or invest in the company, how to raise capital, which markets the firm should access, how and when to produce, etc. Frequently the individual in the case will be present in class to answer questions during the latter part of the class, after the students have expressed their recommendations.

Institution:

UNIVERSITY OF WINDSOR

Faculty of Business Administration
WINDSOR, Ontario
N9B 3P4 (519) 253 - 4232

Program Responsibility:

Michael Zin, Dean
Faculty of Business Administration

Nature of Offering:

Small Business Management and
Entrepreneurship Courses as electives
in the Bachelor of Commerce and the
Master of Business Administration
Programs.

Type and Duration:

One semester courses offered during
senior year of the B.Com. and the
MBA programs.

Competence Level:

Bachelor of Commerce
Master of Business Administration.

Entrance Requirements:

Permission of the Dean.

Calendar Descriptions:

BUS 493c

Small Business Management - Concepts
and Applications

The development of frameworks for decision
making in small business. The course
concentrates on the process of starting
and operating a small business. Topics
include: business definition, differential
advantage concept, location analysis
and finance sourcing. A major objective
is to assist the student in developing
entrepreneurial skills. Applications
will focus on case/situational analysis
and projects.

(Prerequisite: Fourth year standing and
permission of the Dean.)

Calendar Descriptions (cont'd.): BUS 995c

Small Business Entrepreneurship

An advanced course in management, concentrating on the process of establishing, organizing, and operating a small business enterprise. It aims at developing skills in the areas of defining concept and mission of the business, assessing market potential, procuring funds, charting business strategy; designing information and accounting systems, planning and controlling operations, designing the organization, and managing growth. Students are required to field-study enterprises in the Windsor area and hold seminars on their investigation. (Prerequisite: Stage III standing and permission of Dean.)

Institution:

YORK UNIVERSITY

Faculty of Administrative Studies
4700 Keele Street
DOWNSVIEW, Ontario
M3J 1P3 (416) 667-2100

Program Responsibility:

W.B. Crowston, Dean
Faculty of Administrative Studies

Rein Peterson, Co-ordinator
Entrepreneurial Studies Programme.

Nature of Offering:

Programme in Entrepreneurial Studies
as part of the M.B.A. degree programme.

Type and Duration:

One semester courses offered during
second year of the M.B.A. programme.

Competence Level:

Master of Business Administration.

Entrance Requirements:

Successful completion of first year
core courses of the programme.

Calendar Descriptions:

POEN 660

Entrepreneurship and Small Business

The course explores the roles that entrepreneurship and smaller firms play in a society. Participants are challenged to consider the possibility of eventually going into business for themselves, or of working for a smaller firm. The course is also useful for those who will be dealing with smaller firms in the context of larger organizations (e.g. financial institutions and conglomerates). The nature of small - large firms and government relationships will be emphasized. Cases and lectures will be complemented by presentations of guests from industry and government.

Calendar Descriptions (cont'd.): POEN 662

New Venture Formation

The course emphasis is two fold:

(1) identification of personal goals and integrating them with a new venture plan; (2) approaches to solving the problems of new venture start-ups.

Assistance available from governments, professionals and other institutions is covered. The course includes seminars with Canadian entrepreneurs. A report involving the preliminary analysis of a business start-up is required together with a detailed draft of a full-fledged investment proposal for the new venture. Credit for the final preparation and execution of a proposal can be gained in a subsequent semester through a (***) 690 course.

Prerequisites: The seven first year required core courses and POEN 660 which may be taken concurrently or with the permission of the instructor.

POEN 664

Managing the Smaller Enterprise

No course description available.

POEN 666

Advising Small Business

This course is designed to offer education and training in the art and techniques of management consulting as it applies to smaller firms. The overall purpose of the course is the acquisition of knowledge and skills that will enable students to provide management advice to entrepreneurs and small business persons which will improve the performance of smaller organizations. The emphasis throughout the course is an experiential approach to teaching, to provide a deeper and participative type of learning of the crucial aspects of the management consulting process and of the kind of problems small businesses are facing in their day-to-day operations. Aside

Calendar Descriptions (cont'd.):

from text, readings, lectures and simulated classroom exercises, students carry out actual consulting assignments for clients under the supervision of an instructor and with the cooperation of the York Enterprise Development Centre.

Prerequisites: The seven first year required core courses, POEN 660 (which may be taken concurrently), and the permission of the instructor is required.

ACTG

Accounting and Management Control for Small Enterprises

No course description available.

BEHS 621

Management of Creativity and Innovation

An examination of factors which stimulate and inhibit individual and group creativity in organizations and its translation into innovative output by the organization. Emphasis will be placed on the management of research and development, but the role of other parts of the organization will be considered as well. Topics will include individual and group factors in creativity, organizational strategies for innovation, the design of innovative organizations, technology transfer, internal entrepreneurship, entrepreneurs and small businessmen, and career development of professionals.

PRINCE EDWARD ISLAND

Institution: UNIVERSITY OF PRINCE EDWARD ISLAND
Department of Business Administration
CHARLOTTETOWN, P.E.I.
C1A 4P3 (902) 892-4121

Program Responsibility: Walter E. Isenor, Chairman
Department of Business Administration

Nature of Offering: Small Business Management course
offered to senior students as an
elective in the Bachelor of Business
Administration program.

Type and Duration: One semester course open to senior
students.

Competence Level: Bachelor of Business Administration.

Entrance Requirements: Successful completion of:
Corporate Finance - Part I (BUS 332)
and Marketing - Part I (BUS 341)

Calendar Descriptions: BUS 481 W. Isenor

Small Business Management

The objective of the course is to stimulate and encourage an interest in the management of small business enterprise. The course will include a consideration of the potential for small business development in Prince Edward Island as well as an exploration of capital requirements and sources, information systems, marketing and tax considerations.

Prerequisites: Business 332 and 341.

QUEBEC



Institution:

CONCORDIA UNIVERSITY

Faculty of Commerce and Administration
1455 de Maisonneuve Boulevard West
MONTREAL, Quebec
H3G 1M8 (514) 879-5995

Program Responsibility:

Pierre Simon, Dean
Faculty of Commerce and Administration

Nature of Offering:

Minor in Entrepreneurship
and Small Business Management in the
Bachelor of Commerce programme.

Type and Duration:

One semester courses during final
year of B.Comm. programme.

Competence Level:

Bachelor of Commerce.

Entrance Requirements:

Third Year standing and/or Department
approval.

Calendar Descriptions:

Management C451 J.B. Fisher

Managing a Small Business

This introductory course emphasizes
the operational aspects of management
that are uniquely important to a small
enterprise. It provides opportunity
to practice operational decision-making
under conditions characteristic for
small firms.

Management C452 D. Doreen/J.B. Fisher

Entrepreneurship

This course will provide for the
student a source of the basic techniques
needed to start or purchase a business
of his own. Consideration will be given
to evaluation methods, the nature of an
entrepreneur, legal and tax aspects and
other aspects of interest to an individual
starting a venture as a career alternative.

Calendar Descriptions (cont'd.):

Management C454

J.B. Fisher

Policy and Strategy for the Small Enterprise

This course will help the student to familiarize himself with problems of strategy formulation and implementation within the framework of starting and/or managing a small or medium-sized enterprise. All functions of management will be considered in this context and field work will be encouraged.

Institution: University of Montreal Graduate
School of Business Administration

5255 Avenue Decelles
Montreal, Quebec
H3T 1V6

(514) 343-4500
(514) 343-4536

Program Heads: Pierre Laurin, Director
Graduate School of Business Administration

Jean Guertin, Program Head
Small and Medium Enterprises Program

Type of courses offered: Electives in SME management are
offered in the BBA, MBA, and
Certificate in Business Management
(adult education) programs.

The school, through its Administration
Training and Development Program, also
offers seminars and colloquia on SMEs.

Duration and times: Courses last one semester and are given
both during the day and in the evening.

Program: Bachelor of Business Administration
Master of Business Administration
Certificate in Business Management

Prerequisites: SME courses are offered only to
third-year BBA students and second-year
MBA students.
The prerequisites for the Small
Business Administration course in the
Certificate in Business Management
program are Human Relations, Marketing I,
and Finance I.

Calendar descriptions: 3-204 (BBA) B Deschamps

Financial problems of small and
medium enterprises. Management problems
faced by smaller businesses in Quebec
are illustrated by case studies,
representing financial problems whose

Calendar descriptions:
(continued)

analysis and solution cannot be dissociated from the size of the business. The requirements of the situation and the imaginativeness of the solutions often run counter to theoretical orthodoxy.

3-410 (BBA)

R Chaussé

Administration of Small and Medium Enterprises

Identification of the defining characteristics of the SME: development and exercise of authority; organization of human resources; the qualities, talents, attitudes, and value system of the president of an SME; relationship between management and property; the strengths and weakness of the SME; the family business in Quebec: conditions and problems of growth; the socio-economic role of the SME in the world of tomorrow.

5-011 (MBA)

J M Toulouse

Entrepreneurship

The purpose of this course is to lead students to reflect on their ability and interest in entrepreneurial activities, to examine the dynamics between the entrepreneur and his/her business, and to consider the effects of entrepreneurial activity on the community. The course is intended primarily for students who are seriously thinking about starting or acquiring a business within three years of graduation. The main topics dealt with are: the entrepreneur and other business agents, Quebec myths of entrepreneurship, the development of entrepreneurs, the initial relationship between the entrepreneur and the business, stages in the life of an entrepreneur, entrepreneurship and big business, and the entrepreneur as agent of development.

This course is run primarily as a seminar, with the focus on case studies, practical exercises, and discussion of readings.

Calendar descriptions
(continued)

5-156 (MBA)

C Choquette

Seminar on Marketing in SMEs

This course deals with the special problems of marketing management in an SME, with the usual limitations on physical, financial, and human resources. The course focusses mainly on product policy management; students will consider the problems related to the introduction of a new product, the concept of cost-effective operations, negotiation with distribution networks, how to devise an advertising campaign on a limited budget, and so forth.

Students will also learn how to use secondary information available in the immediate environment.

Active student participation is essential during discussion of case studies and the examination of various business dossiers.

5-205 (MBA)

J Guertin

Financial Problems of SMEs

This course presents, primarily through case studies, management problems faced by smaller businesses. It is intended for action-oriented persons who wish to become entrepreneurs or work with entrepreneurs. We will consider how an entrepreneur can analyse his/her financial problems and determine what solutions are open to him or her. Solutions must take into account the limitations peculiar to the SME, the entrepreneur's personality, and the business environment.

The student is made aware of the special characteristics of the business environment in Quebec. The course is designed for all students, whether specializing in finance or not. It is especially recommended for those who wish to work in a smaller business or

Calendar descriptions
(continued)

start their own business.

33-431-74 (Certificate course) J Legault

Small Business Administration

This course aims to develop a scientific approach to the main management problems faced by SMEs in Quebec.

Finance: problems in survival, growth, and stability; close relations with financial agents; negotiation with banks (short term) and other financial institutions (medium and long term).

Marketing: Problems of competition, market share, launching a new product, marketing strategy.

Administration: The special concept of small-business administration; examination of management problems in a family business; defining and developing a strategy.

Summary: Simulation of the process of starting a small business.

Prerequisites: 31-436-71 Human Relations
33-133-71 Marketing I
32-231-71 Finance I

Institution:

McGILL UNIVERSITY

Faculty of Management
Samuel Bronfman Building
1001 Sherbrooke St. West
MONTREAL, Quebec
H3A 1G5 (514) -392-5981/392-4336

Program Responsibility:

L. Picard, Dean
Faculty of Management

W.H. Pugsley, Adviser
Entrepreneurship Concentration - B.Com.
Program.

Joan E. Gilday, Assistant Director
Management Institute - McGill University.

Nature of Offerings:

A Concentration in Entrepreneurship in
the B.Com. Program; and a Small Business
Concentration in the M.B.A. Program.

The University's Management Institute
offers a non-credit course in Small
Business Management open to the
general public.

Type and Duration:

One semester courses offered during
senior years of the B.Com. and M.B.A.
Programs.

The Management Institute's course is
held one evening a week for a period
of eight weeks.

Competence Level:

Bachelor of Commerce
Master of Business Administration

Entrance Requirements:

Entrepreneurship Concentration
students should have completed the
introductory primary core courses.
M.B.A. students enrolled in the Small
Business Concentration are required
to have successfully completed the
first year of the M.B.A. Program.

There are no entrance requirements
for the Management Institute's course
in Small Business Management.

Calendar Description:

B.Com. Program

276-462

P. Cook

Management of New Enterprise

Evaluation of new business ventures, recognition and treatment of associated risks. Detailed consideration includes taxes, SEC regulations, patents, and sources of risk funds. Emphasis is placed on the critical importance of the entrepreneur himself, the demands and the risks faced as well as the rewards and satisfactions.

Prerequisite: 280-341

276-464

W.H. Pugsley

Smaller Business

Much the same kind of coverage as in Corporate Policy, but concerned specifically with Small Business, which has different problems - identification of initial opportunity, finance to get started, early survival, etc. - from the corporations in later stages of development considered in Corporate Policy.

M.B.A. Program

276-664

W.H. Ellis

Managing the Small Business

Focusing on the strategies and operating policies of small business enterprises, the course is designed for individuals who are considering entrepreneurial careers either as owners or managers. Provides a practical approach to the many problems likely to be encountered in the evolving life cycle of the small business.

Calendar Description (cont'd.):

Management Institute

W.H. Ellis

Managing the Small Business

This course is for all men and women with an interest in small business management. It is for those who plan to go into business for themselves, as well as for owner-managers who want to increase their knowledge of the modern small business corporation.

The objective will be to show you how you can succeed as an entrepreneur or an independent businessperson.

Cost: \$250

Institution: University of Sherbrooke

Faculty of Administration
Sherbrooke, Quebec
J1K 2R1

Program Heads: Alain Cousineau, Dean
Faculty of Administration

Jean-Louis Bergeron, Chairman
Department of Management

Type of courses offered: Electives in entrepreneurship and SME management are offered to third year BBA students and second-year MBA students.

Duration: One semester.

Program: Bachelor of Business Administration
Master of Business Administration

Prerequisites: BBA students must have completed 60 credits. The MBA courses are offered only to second-year students.

Calender Description: FEC 3803 (BBA)

Seminar in Financial Management--SME

Aim: through case studies, to bring the student into contact with practical, real experiences of small business financing in Quebec; to familiarize the student with the sources of financing and the characteristics of various types of lenders; to devise investment projects; to conduct studies on cost-effectiveness and methods of financing; to have the student foresee, plan for, and solve SME financial problems.

Calendar descriptions
(continued)

Content: Security and methods of financing, analysis of the financial situation, presenting a financing project, examples of financial difficulties, examples of business launchings, assessment and purchase of a business, expansion, liquidation.

Prerequisites: FEC 1023
FINANCE II

ADM 4843 (BBA)

This course aims to make students aware of the special characteristics of the SME in Quebec: its size, field of action, growth potential. In the first part of the course, students will familiarize themselves with documents supplied to them in order to gain an understanding of the leading role played by SMEs in the principal spheres of economic activity in Quebec. In the second part, students will be asked to devise a plan of action for the creation of an SME in the area of their choice. Alternatively, students may formulate specific recommendations to improve the overall administration of an existing SME. Note: This course is for students who have completed at least 60 credits.

ADM 5213 SME Administration

The main objective of this course is to analyse special problems faced by an administrator when applying general administrative principles and concepts to SME administration. Case studies will demonstrate some special characteristics of the SME.

Calendar descriptions:
(continued)

ADM 6023

The Entrepreneur and the Creation of a
Business

The emphasis in this course is on determining the dominant characteristics of the successful entrepreneur. The objective of the course is to promote the conceptualization and actualization of an idea with commercial potential. The student will present a project in its various stages, from the development of an idea to its actualization.

ADM 6033

Creating a Business

The objective of this seminar is to give concrete form to a large-scale project, going through all the phases necessary to actualize an idea with verifiable commercial potential. Students will be asked to formulate a comprehensive and detailed plan, showing all the basic elements of strategic planning, financing, marketing, and the other stages required to start a business or a service of their own choosing. A multidisciplinary evaluation committee will examine the plans and give the students guidance at the end of the course.

Institution: University of Quebec at Chicoutimi
930 rue Jacques Cartier est
Chicoutimi, Quebec
G7H 2B1
(418) 545-5616

Program Director: Gérard Guérin, Director
Administrative Sciences Module

Type of courses offered: Electives in entrepreneurship and SME management are offered in the Bachelor of Business Administration program.

Duration: One semester.

Program: Bachelor of Business Administration

Prerequisites: None.

Calendar Descriptions: 2 MAN-00301
The Entrepreneur and the Creation of a Business
The purpose of this course is to introduce students to the problems in operational decision-making faced by entrepreneurs who are creating their own businesses. The course aims to encourage creativity in evaluating and trying out innovative ideas.
Since a spirit of initiative cannot be taught like a purely mechanical technique, it is evident that the students must themselves discover, manipulate, and assess innovative ideas. Some reference will be made to suggested articles and books, and the students will come into contact with actual situations that will be presented in class. They will submit a

Calendar Descriptions:
(continued)

report of all phases from conceptualization to actualization of a new idea. The last phase is an integral part of the course: projects will be submitted to a board of experts, who will evaluate the originality and worth of the submissions. For a more dynamic course, the students will have contact with businessmen and guest professors during the semester.

2 MAN--00610

SME Seminar

The purpose of this course is to make students aware of the special problems of small and medium enterprises.

Topics include: the entrepreneur in an already-established business; the growth and development of small businesses; problems of technology, marketing, finance, and management faced by people who set up their own business.

Institution: University of Quebec at Montreal
Macdonald-Stewart Management Chair
P O Box 8888, Station A
Montreal, Quebec
H3C 3P8
(514) 282-7177

Program Directors: Paul Dell'Aniello
Holder of Macdonald-Stewart Management Chair
Yvon G Perreault, Chief
Training the SME Businessman

Type of courses offered: An elective in SME Management is offered
in the Bachelor of Business Administration
program.
An SME training program is offered to owners
or managers of small businesses and to
persons who wish to start their own business.

Duration: The BBA courses last one semester.
The training program for businessmen takes
place in two four-hour evening sessions
per week for one month, for a total of
32 hours of instruction.

Program: Bachelor of Business Administration

Prerequisites: The prerequisites for the SME Management
seminar in the BBA program are Marketing
(ADM 3300) and Financial Management
(ADM 3500).
There are no prerequisites for the
businessman training program.

Calendar Descriptions: ADM 5120 P Dell'Aniello
Seminar in SME Management
Topics include: defining characteristics
of small and medium enterprises in Quebec;
their strengths and weaknesses; management
strategy; administrative methods;
problems in starting or acquiring an
SME; financial and administrative control;

Calendar Descriptions:
(continued)

marketing programs and policies; operational management; stores; services; production; employee relations; purchasing and inventory control; legal aspects of the business world.

Prerequisites: ADM 3300 Marketing
ADM 3500 Financial Management

Businessman Training Program SME

This course is intended for owners or managers of a small business or for anyone who wishes to start a business. The program lasts for four weeks, with a four-hour session two evenings a week.

The topics dealt with include: the factors that determine the success or failure of a business; accounting and financial analysis; reading financial statements; planning financial requirements; short-term financing and the role of banks; long-term financing; types of businesses; legal aspects of business; marketing; taxation; buying and selling a business; decision-making.

Active participation, special teaching materials, and experienced, practical-minded instructors make this course an enriching experience.

Cost: \$250

Institution: Laval University
Cité Universitaire
Ste-Foy, Quebec
G1K 7P4
(418) 656-2131

Program Director: Claude Lebon, Dean
Faculty of Administrative Sciences

Type of course offered: An elective course--Introduction to the SME--is offered to third-year students in the Bachelor of Administrative Sciences program.

Duration: One semester.

Program: Bachelor of Administrative Sciences

Prerequisites:

Calendar description: MNG-15947
Introduction to the SME
Course description unavailable.

SASKATCHEWAN

Institution: UNIVERSITY OF REGINA
Faculty of Administration
Education Building
REGINA, Saskatchewan
S4S 0A2 (306) 584-4111

Program Responsibility: Dr. D. E. Shaw, Dean
Faculty of Administration

Nature of Offering: Small Business Management course
offered as an elective in the Bachelor
of Administration program.

Type and Duration: One semester course during the third
year of the program.

Competence Level: Bachelor of Administration

Entrance Requirement: Completion of all 200 level Administration
classes or permission of the Assistant Dean.
Prerequisite: Completion of all 200
level Administration classes or permission
of Assistant Dean.

Calendar Descriptions: Administration 311 J.R. Mason
Small Business Management
An advanced level class focusing on the
owner-managed firm, its differentiating
characteristics, strengths and weaknesses,
relationship to its environment, and the
strategic problems it faces. Vertical
market relations, sources of assistance,
the entrepreneurial function, and the
role of small business in the economy
will be investigated.

Institution: UNIVERSITY OF SASKATCHEWAN
College of Commerce
SASKATOON, Saskatchewan
S7N 0W0 (306) 343-2100

Program Responsibility: P. Michael Maher, Dean
College of Commerce

Nature of Offering: Course in Venture Management
as an elective in the MBA Program.

Type and Duration: One semester course offered to
Second Year MBA students.

Competence Level: Master of Business Administration.

Entrance Requirements: Successful completion of First Year
of the MBA Program.

Calendar Description: MBA 859 A/B C.W. Boyd
New Venture Management
Venture Management is a general term
used to describe that economic
activity that deals with the initiation
of new business endeavors. Included
under this definition are such activities
as the start-up of new companies or
new subunits of large organizations,
product development, and product-market
expansion. The class focuses on the
processes and techniques required to
convert ideas, inventions and innovation
into profitable business undertakings.

BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY

Course Title : Small Business Management I

Course Number: 10.902

Program : Administrative Management Technology

Instructor : R.W. Vandermark

Prerequisites: Some exposure to basic business operating practices.

Examination
and Course

Credit : Credit for course completion will be granted to students who submit an adequately prepared 'BUSINESS PLAN'

Reading

References : Weekly handouts covering the major topics throughout the course

Small Business Management Part 1

Course Schedule

<u>WEEK</u>	<u>TOPIC</u>	<u>BUSINESS PLAN DISCUSSIONS</u>
1	OPPORTUNITIES FOR SMALL BUSINESS	Are you ready to become an entrepreneur?
2	WAYS TO GET INTO BUSINESS: 1) A NEW START BUSINESS 2) A FRANCHISE 3) BUYING AN ESTABLISHED BUSINESS	Identifying the business idea, potential customers, and competitive advantages.
3	THE BUSINESS LOCATION	Choosing the right location.

<u>WEEK</u>	<u>TOPIC</u>	<u>BUSINESS PLAN DISCUSSIONS</u>
5	LEGAL PROCEDURES IN STARTING A BUSINESS	Sound legal arrangements.
6	FINANCING THE BUSINESS. 1) DETERMINING THE CAPITAL NEEDS 2) SOURCES OF CAPITAL	The financial plan.
8	PLANNING PRODUCTIVITY 1) FROM LAYOUT 2) FROM EMPLOYEES	Operating policies and procedures.
9	RECORD KEEPING 1) SETTING UP PROPER RECORDS	
10	2) ANALYZING RECORDS	Control procedures.
11	MANAGING YOUR PRODUCTS AND PRICING	
12	PROMOTING THE BUSINESS SUCCESSFULLY	

Small Business Management I

Course Outline

1. OPPORTUNITIES FOR SMALL BUSINESS.
 - a) How small businesses fare in various sectors of the Canadian economy.
 - b) Problems of small business
 - c) Causes of business failure
 - d) Prerequisites for success in business

2. STARTING A NEW BUSINESS FROM SCRATCH.
 - a) advantages & disadvantages
 - b) when is an opportunity real
 - c) developing a business plan (prospectus)
 - d) dangers of inadequate investigation

Course Outline cont'd.

3. BUYING AN EXISTING BUSINESS

- a) advantages
- b) the independant audit
- c) valuation of the business
- d) areas for special analysis
 - 1) financial picture
 - 2) assets
 - 3) taxes
 - 4) future business potential.

4. THE BUSINESS LOCATION DECISION

- a) Factors affecting different business types
 - 1) businesses dependant on drawing customers to the location
 - 2) businesses dependant on competitive ability to supply customers from the location

5. LEGAL PROBLEMS AND PROCEDURES

- a) Possible forms of organization
 - 1) proprietorship
 - 2) partnership
 - 3) the corporation
- b) Factors affecting the selection
 - 1) control
 - 2) capital and credit
 - 3) liability
 - 4) taxes and government regulations
- c) legal steps to launch the organization

6. PROCURING INITIAL CAPITAL AND CREDIT

- a) Equity capital and debt capital
- b) Nature of capital needs
 - 1) working capital
 - 2) fixed asset
 - 3) promotional expense capital
 - 4) personal expense capital
- c) Estimating capital requirements
 - 1) estimating probably sales volume
 - 2) translating sales data to asset needs
 - 3) forecasting the business cash flow

d) Sources of funds

- 1) personal savings
- 2) commercial bank loans
- 3) trade credit
- 4) equipment supplier loans
- 5) private investor funds

e) Credit factors

- 1) liquidity of the business
- 2) utilization of business assets
- 3) management of cash flow
- 4) choosing one's banker wisely
- 5) good supplier relations

7. PROVIDING THE RIGHT PHYSICAL FACILITIES

- a) productivity of retail selling and inventory space
- b) designing cost efficient product manufacturing and handling operations

8. STAFFING THE BUSINESS

- a) identifying skills required
- b) obtaining suitable personnel
- c) conditions which encourage productivity of employees

9. PLANNING FOR BUSINESS OPERATIONS

a) the importance of sound business policies

- 1) customer service policies
- 2) credit granting and collection policies
- 3) employee policies

b) Records to be kept

- 1) source records of all business transactions
- 2) operating statements of the business performance
- 3) records required by governments

c) Planning a successful business launch

- 1) setting objectives
- 2) Selecting the best use of your competitive tools.
- 3) Scheduling a marketing program to meet the objectives.

Course Title : Small Business Management II
Course Number: 10:903
Program : Administrative Management Technology
Instructor : R.W. Vandermark

OBJECTIVES: This course will assist in planning, organizing, directing, and controlling each of the key functional areas of a small business. It is designed to improve the effectiveness of the student in tackling his day-to-day business problems.

SUMMARY: It is designed for the manager or owner of a small business and for students who have completed Part I and wish to be exposed to operating techniques before embarking on a new business venture. Subjects covered through lecture, case studies, films and general discussion will include financial control, record-keeping, budgeting, forecasting, product and inventory control, pricing, sales promotion, staffing and other functions pertinent to successful business operation.

EVALUATION:	Course participation	40%
	Mid-term examination	20%
	Final examination	40%

TOPICS

- 1 Management in a small business:
 - (a) The demand on the owner/manager
 - (b) Cause of failure in a small business
 - (c) Characteristics of successful operations

WEEK

TOPICS

- 2 Marketing Management:
- (a) The marketing concept and implementation
 - (b) Market research
 - (c) How to make a profile of customers and on which groups to concentrate
 - (d) The ingredients of marketing
- 3 Developing the Marketing Strategy:
- (a) Marketing Mix: Products/services
methods of delivery
control and monitoring
- 4 Sales, Promotion and Pricing:
- (a) The selling function
 - (b) Managing various forms of business promotions
 - (c) What to promote and to whom
 - (d) Supply and demand related to price
- 5 Financial Management - Part (A)
- (a) Financial statements
 - (b) Sources of capital and credit criteria
 - (c) The financial objective-return on owners investment
- 6 Financial Management - Part (B)
- (a) Preparation of income statement forecast
 - (b) Financial aspects of a business expansion
 - (c) Budgeting and the importance of up to date records
- 7 Financial Management - Part (C)
- (a) Management of current assets and fixed assets to maintain cash flow
 - (b) Where to look for cost savings
 - (c) Costing
- 8 An introduction to accounting systems:
- (a) What records are needed
 - (b) Control of expenses and costs
 - (c) Where management should concentrate its efforts in the control function.
- 9 Income Tax:
- (a) How the type of business is affected by taxes
 - (b) Depreciation - how is it determined and how it takes affects taxes
 - (c) The withdrawal of funds from the business

WEEK

TOPICS

10

Motivating Personnel:

- (a) Hiring and selecting new employees
- (b) Training is important
- (c) What motivates people to be productive?

11

Time Management and Decision Making

12

FINAL EXAMINATION

CANADORE COLLEGE
OF APPLIED ARTS AND TECHNOLOGY

Course Title : Small Business Management

Course Number: 221-4

Program : Business Administration

Instructor :

Upon completion of this course, the student should have a knowledge of the many factors that must be considered when starting and operating a small business.

He should also have a framework for evaluating these factors, along with a knowledge of where to obtain information and answers to any questions and problems which he encounters.

The course is designed to cover the following sequence of events to arrive at the above stated objectives.

1. Definition & characteristics of a small business
2. Determining capital requirements & sources of capital
3. Selecting a profitable location
4. Establishing a business
5. Deciding on the form of business ownership
6. Accounting Problems - The Importance of Good Bookkeeping
7. Marketing
8. Business Policy & Long-range planning
9. Business Policy: Strategy developed to obtain the desired objectives
10. The coming economic climate for small business.

To achieve our stated goal, the student will be supplied with sources of information to obtain an indepth understanding of each point covered, emphasis will be placed on texts, periodicals, associations, and agencies available as sources of reference.

Prepared material will be made available to the student to assist him in understanding these course objectives, e.g. students will have an opportunity to analyze prepared business organizations and create and develop new ones from resource material made available to him.

7. Marketing as it related to each type of business, e.g. retail distributor manufacturer, etc. Character of the market age groups, trends, etc. Location as it relates to distribution and resources at hand. Statement of company objectives company policy. Customer wants, motives, likes, and dislikes. Inventory versus turnover as it related to marketing. The pricing of stock pertaining to the type of business. Product life cycle, choosing a market niche. Markdowns as a method of stock control relating to retail in general wholesale manufacturing. Case study relating to marketing.
8. Defining quantified objectives. Strategy developed to obtain the desired objectives. An extensive discussion on case studies covering the above points. A review of the integration of marketing, financial, personnel, business location, business structure, business control, etc. To direct all strategies so that they obtain the desired objectives.
9. A continuation of the previous objectives with further case studies, and group to establish their own strategy and objective in a chosen hypothetical business situation. Summary and questioning of the proposed solutions that will develop from case studies and chosen hypothetical situations.

A detailed study of the Canadian Economic Outlook as it relates to small business. The consumer, his income and expenditures as will affect future expansion for small business. Specific growth areas for the small business, e.g. service industry product differentiation one method in choosing your market niche as a small businessman. Analysis of prepared material on the economic outlook of small business, in the economy. Revisions required in these forecast re current developments.

Grading Practices:

Problem solving & cases	50%
Frequent quizzes	30%
Final assignment	20%

Following the designated sequence, each point is dealt with as follows:

1. The importance of small business to our economy. Trends in business size. How will it change in the future? Fields not being serviced by big business. Information regarding the various franchise opportunities - some depth study of the franchise boom; texts available on the subject.
2. Discussion of examples which are designed to show importance of forecasting in determining capital requirements and the effect of utilization of outside sources. Danger of becoming over extended in completing financial arrangements. Working capital requirements. Reserves for contingencies. Return on investment. Dealing with lending agencies. Financing of inventory, equipment, buildings, acc. receivable, etc.
3. The present and projected market. Characteristics of the market-population, income, purchasing power, competitive facilities, accessibility of site of trading area generative business, shared business, non-generative business interception, cumulative attraction, compatibility, competition, site economics. (these last principles are related to the location of retail).
4. Points covered on this subject, to buy, build, or lease-zoning laws, parking facilities and bylaws, why do people sell their business worth of an established clientele-inventory evaluation in business, purchase determining the profit history of a business, (and as it relates to future profits), what are the sources to be consulted in the purchase and establishment of a business.
5. Forms of business ownership. Sole proprietorship characteristics, advantages, disadvantages. Partnership characteristics, cost, advantages, disadvantages. Franchise dealerships points as covered above. Limited company characteristics, etc., public and private company. Bankruptcy proposal assignment, voluntary, involuntary, e.g. receiving order effects on individual as per limited company or sole ownership. Insurance types of businessmen's insurance. Taxes sales tax corporate tax municipal tax, etc. Leases offer to lease landlord tenant relationship. Collection of accounts keeping accounts receivable current agencies available to assist collection.
6. Accounting how to select a good accountant. Accounting records required. How to understand a balance sheet. An accounting view of inventory control. Control of cash flow. A review of some prepared accounting documents, e.g. balance sheet income statement. Preparing a simple bookkeeping system as per small business requirements. Some problem solving exercises.

CAPILLANO COLLEGE

Course Title : Small Business Management
Course Number: 210
Program : Small Business Management Program
Instructor : W.H. (Bill) LaCOSTE

Objectives of Course:

- General: To examine the areas of interest for the Small Business Manager.
- Instructional:
1. An outline of steps required in starting and operating a business and how best to accomplish these steps.
 2. A review of management techniques in common practice in business today.
 3. To develop skills for recognizing business problems and how to effect controls to overcome these problems.

Course Description: To examine forms and methods of organization and problems of small business in our society, such as inadequate planning, undercapitalization, government restrictions.

References: Baumbach, Lawyer, Kelly - How to Organize and Operate a Small Business. Prentice-Hall Inc.

Evaluation Profile:

Assignments	40%
Term Test	20%
Final Examination	30%
Class Participation	10%
	<u>100%</u>

Letter Grades:

A	= 80 - 100%
B	= 70 - 79%
C	= 60 - 69%
D	= 50 - 59%
F	= Less than 50%

I grades will not be issued in this course.

Late assignments will not be accepted.

<u>TOPICS:</u>	<u>WEEK #</u>		<u>CHAPTER REFERENCE</u>
	1	The roll of small Business and factors in Small Business success	1, 2, 3.
	2	Management Philosophy - Policies and Procedures	12
	3	Forms of Organization Simplified Record Systems	26
	4 & 5	Financial Statements - How to measure and plan your business	General reading 5 through 10
	6 & 7	Cash Flow - How to avoid Working Capital shortage	General reading 5 through 10
	8	Financial Ratios	
	9	Mid-term exam Nov. 7	
	10	Credit - A sales tool	20
	11	How to arrange Business Financing	11
	12	Government Relations	24
	13	EDP in the Small Business	
	14	Review	
	15	Final Exam Dec 19.	

This Lesson Outline has been made with a view toward change, depending on the student's interests. A survey will be made shortly after the course begins.

CARIBOO COLLEGE

Course Title : Small Business Management
Course Number: 252
Program : B.Admin. Certificate/B.Admin. Diploma
Instructor : Bruce Cunliffe

Small Business Management:

This course will provide the student with a combination of theoretical and practical knowledge on small business management.

The student will have the opportunity to participate through class discussion and case presentation.

The more specific objectives of the course include:

1. Review the advantages and disadvantages of small business as they will be of interest to students, prospective owners and managers of small business.
2. Indicate how to become involved in a small business.
3. Demonstrate how to avoid mistakes in conceiving, initiating, organizing, and operating a small business that have been economically fatal to others.
4. Explain how to achieve the optimum benefit from the limited economic and human resources available to most small businesses.
5. Assist in preparing one for the successful management and operation of their own business.

Length of Course:

14 weeks

Text:

Successful Small Business Management
Tate Megginson, Scott Trueblord - BPI

Grading:

Tests, assignments and class work	50%
Final Exam	50%

Class Schedule:TEXT
READINGS

WEEK I	-	Course Introduction	
WEEK II	-	Characteristics of Small Business and Their Owner Managers	Ch. 1 - 3
WEEK III	-	Selecting a Business	Ch. 4 - 6
WEEK IV	-	Establishing a Business	Ch. 7 - 8
WEEK V	-	Managing a Business	Ch. 9 - 11
WEEK VI	-	Marketing Your Product or Service	Ch.12 - 14
WEEK VII	-	Producing Your Product or Service	Ch.15 - 17
WEEK VIII	-	Personnel	Ch.18 - 20
WEEK IX	-	Accounting Records and Reports	Ch.21 - 22
WEEK X	-	Financial Planning and Control	Ch.23 - 25
WEEK XI	-	Interpreting Financial Information and Reports	
WEEK XII	-	Practical Aspects of Small Business Management	
WEEK XIII	-	Course Review	
WEEK XIV	-	Final Exam	

CARLETON UNIVERSITY

Course Title : Small Business/Entrepreneurship

Course Number: 42.360

Program : Bachelor of Commerce

Instructor : Peter Downing

Course Information

In recognition that this course will be offered for the first time, it is deemed appropriate to inform you now of its contents and expectations. This information "package" is not intended to scare the student; its purpose is to make the course a meaningful, effective and efficient learning experience.

Course Objectives

General

It is not my intention to portray the role of an entrepreneur as an easy and lucrative road to happiness; but, that being an owner/manager is as creative, as satisfying and as rewarding a way of life as that of any other chosen career.

Short-run

To provide the student with the opportunity to study the psychological, social, economical and practical aspects of small business/entrepreneurship. (It is a study course and not a how-to work-shop.)

Long-run

To encourage the student to one day attempt a commercial venture of his/her own.

Course Outline

Commentary

This course has four specific avenues of study which will contribute to the success of its objectives. These four areas are:

- a. the classroom...Monday sessions;
- b. the readings;
- c. the term project; and,
- d. the guest speakers...Thursday sessions.

Monday sessions - This time will be devoted to concepts, theories, academic study and analysis. Please note that two of these time periods have been designated as "Progress Report Meetings" at which I will meet with each group to ascertain the progress and problems related to the term project.

Readings - A list of compulsory texts and readings has been provided with this information package.

Term project - Group work, three students to a group, is a compulsory mandate of this course.

Guest speakers - Guest speakers have not been chosen at random but by specific design to enhance our learning. For instance, three of the speakers are from the text The Risk Takers. In order to better understand franchising, we will invite a franchisor and a franchisee.

It should be noted, as it is shown on the grading scheme, that should a student continuously be absent from the guest speaker session, it will be deemed that his/her study will be deficient and may fail the course.

Grading Scheme

Group Work

Hand in a demographic profile questionnaire based on the first chapters of the text and readings. 5 marks

Term Project 50 marks

Individual Work

Class Test - Case 20 marks

Class Test - Readings 25 marks

Total 100 marks

A penalty for lost learning will be assessed on a cumulative basis for each Thursday session missed at which a guest speaker has been invited to the class.

The Thursday, February 8, 1979 class has been transferred to Saturday morning, February 10, 1979 in order to accommodate the speaker. If a speaker is prepared to give up his personal time to come to our class, we should be willing to give up part of our time. To be absent on this Saturday would be an extreme discourtesy to this individual, the class and the School of Commerce and will earn a 15 mark penalty, even if it is the one and only class you miss all term.

<u>Missed Thursday Sessions</u>	<u>Marks Lost</u>	<u>Cumulative Loss</u>
first	5	5
second	10	15
third	10	25
fourth	15	40
fifth	15	55

Compulsory Course Prerequisites

Marketing Management Studies 42.208*

Finance Management Studies 42.250*

Compulsory Texts:

1. Small Business Management (SBM) - A Guide to Entrepreneurship
by Nicholas C. Siropilis, Houghton, Mifflin Company Publishers.
2. Small Business - Building a Balanced Economy (SB) by Rein
Peterson, Press Porceplic Ltd.
3. The Risk Takers (TRT) - The Dreamers Who Build a Business from
an Idea by Alexander Ross, Financial Post/Macmillan.

Hand-outs Readings:

1. That Urge to Achieve by David McClelland.
2. Profiles of Technical Entrepreneurs by Litvak and Maule.
3. The Displaced, Uncomfortable Entrepreneur by Albert Shapero.
4. Key-crises approach for the evaluation of small firms, synopsis
by Peter R. Downing.
5. Management by Awareness by Peter R. Downing.
6. Car Concept approach to evaluate a business by Peter R. Downing.
7. Case: Prairie Motors.

COURSE OUTLINE

<u>Lecture No.</u>	<u>Readings</u>	<u>Content and Commentary</u>
1	Reading No. 1	<p>Film: <u>That Urge to Achieve</u> with David McClelland See hand-out article same topic and author Please ignore the garb and the "Paper Chase" bow-tie of a Harvard professor.</p> <p>Discussion of course content and outline. Finalization of group formations and selection of industry.</p>

COURSE OUTLINE cont'd.

<u>Lecture No.</u>	<u>Readings</u>	<u>Content and Commentary</u>
2	SBM CH. 2 SB CH. 2 TRT CH. 1 Readings No. 2 and No. 3	Demographic profile questionnaire to be handed-in based on readings and text chapters specified for this date. Group effort 5 marks. Discussion of assignment. Distinguish between an investor, an innovator, and an entrepreneur, see ch 2 of SB
3	Reading No. 2 TRT CH. 1 p. 9	Professor Chris Maule Department of Economics, Carleton University
4	SBM Ch. 3 SB Ch. 3 TRT Ch. 3	Answer and be prepared to discuss SBM Cases No. 1A and 2A and from SB ch. 3 What is meant by Appropriate Technology? Is this concept applicable to Canada? If so, can you think of any examples?
5	Guest Speaker	To be confirmed
6	SBM Ch. 4 SB Ch. 4 TRT Ch. 4 Readings No. 3	Answer and be prepared to discuss SBM Cases No. 4A and 4C and from SB ch. 4 Do you agree with the definitions of what is a small business? If not, how would you define small business? How does Phil Japp "fit" into Shapero's article?
7	Guest Speaker	To be confirmed
8	TRT Ch. 7	Progress meeting No. 1. I will meet with each group to ascertain its progress and problems with the term projects. Specific times will be scheduled.
9	TRT Ch. 7	Mr. Ward McKimm, Lawyer McKimm, Weller, Keeler, McFarlane, Ottawa and President of Performance Sailcraft Ltd.
10	SBM Ch. 7 SB Ch. 5 TRT Ch. 5	Answer and be prepared to discuss SBM case 7A What tax incentives, if any, should be offered small business?

COURSE OUTLINE cont'd.

<u>Lecture No.</u>	<u>Readings</u>	<u>Content and Commentary</u>
11	GUEST SPEAKER TRT Ch. 5	Mr. Wilson Southam, President Cox Systems Ltd. Stoney Creek, Ontario This class will be held in Room 214 Residence Commons Building from 9:30 a.m. to 11:00 a.m. Coffee and doughnuts from 9:00 a.m. to 9:30 a.m.
12	Mid-term Test	A case will be the examination material. The questions will be along the same line as presented in cases taken to date.
13		OPEN
14	SBM Chs. 8 and 12	Progress report meeting No. 2
15	Readings No. 1	Robert De Cotret, MP for Ottawa Centre former head of The Conference Board in Canada
16	SBM Ch. 10 Readings No. 4	Case: Readings No. 7 Prairie Motors Which key - crises are applicable? Will things be better in two years? Is a franchisee an employee of the franchisor or an independent owner/manager entrepreneur?
17	GUEST SPEAKER	Franchisor T.B.A.
18	SBM Chs. 13 and 17 Readings No. 5	How applicable has readings No. 4 and No. 5 been to your work to date?
19	Guest Speaker	Franchisee T.B.A.
20	Readings No. 6 TRT Ch. 6	OPEN
21	Mid-term Test	Based on readings from SBM and SB
22	SB 7 and 8	OPEN
23		OPEN
24	SB 9 and 10	OPEN
25		OPEN

Term Project The Profile of Small Business

- Objectives :
1. To introduce the students to owner/manager-entrepreneurs...persons who are placing their own talents and money on "the line".
 2. To compare demographic data with demographic characteristics listed in the readings.
 3. To learn how to finance "entry" into a market.
 4. To study a particular line of small business.

- Report Content :
- (i) Table of contents.
 - (ii) Demographic profile of the owner/managers, (the first chapters of the books plus readings will be preparatory study for the questionnaire which will be common to each group study).
 - (iii) How the business was initially financed, (personal investment, family borrowing, banks, government, suppliers).
 - (iv) Market characteristics, particularly pertaining to the Ottawa area, (the standard outline which I use in my 42.208* Marketing course will be common to each group).
 - (v) Return of investment which can best be defined for this report as "Is it possible for the owner/manager to earn a salary of \$30,000?"
 - (vi) A recommendation of further areas of study to be conducted by future 42.360* students.
 - (vii) Confidential list of the names of the companies and the persons interviewed and the date of the interview.
 - (viii) List of references, i.e. Statistics Canada.

Quantity and Quality :

Ideally, the number of companies in an industry to be profiled should be 25 firms. It is recognized that this number may not be attained. At the time of the First Progress Report meeting, each group will have to state and justify the number of firms they plan to profile.

I would expect a report to be no more than 20 pages, for all the above (ii) to (vi) parts inclusive as outlined and exclusive of exhibits. Remember this is only a thirteen week course!

A report may at a future date be edited by me and used for publication.

CONCORDIA UNIVERSITY

Course Title : Entrepreneurship

Course Number: Management 452/4

Program : B.Comm.

Instructor : Dr. D. Doreen

Course Objectives:

- To familiarize students with various aspects of small business.
- To assist students in starting small business of their own by informing them of components involved in small business formation and management.
- To provide students with some tools for self-analysis with regard to an entrepreneurial career.

Format:

The course design is based on the belief that students learn most by being actively involved; therefore, "lectures" will be kept to a minimum but discussion will be emphasized.

Specialists in specific areas will be invited as guest lecturers.

The case method of study will be used as well as experiential learning techniques in the form of self-analysis exercises.

Assignments and Grading:

Paper (approximately 10 pages) - Value 20%

Students will prepare a paper on some academic aspect of small business (e.g., venture capital in Canada, personal characteristics of the successful/unsuccessful entrepreneur, etc.)

Major Project - Value 50%

Students will work in small groups to prepare a comprehensive business plan. Each group will subsequently make a related presentation to the class.

Class Participation - 30%

Students will prepare assigned case studies for discussion in class.

Students will also complete small projects and self-assessment exercises and share ideas and experiences in group discussion.

Required Text:

Siropolis, Nicholas C. Small Business Management: A Guide to Entrepreneurship (Boston: Houghton Mifflin Company, 1977)

Supplementary readings on particular aspects of entrepreneurship will be suggested as the topics are covered.

CONCORDIA UNIVERSITY

Course Title : Policy and Strategy for the Small Enterprise

Course Number: Management 454/2

Program : B.Comm.

Instructor : J.B. Fisher

This course will help the student to familiarize himself with problems of strategy formulation and implementation within the framework of starting and/or managing a small or medium sized business. Attention will also be paid to the fact that entrepreneurship in small business results in some of the most dynamic, profitable and interesting firms to be found. An examination will also be made of the characteristics and motivations of the successful operator, his problems, risks, possibilities and rewards in starting a new business or buying an established one.

The essential function of the successful strategist is to recognize the commercial potential of a product, process, or service; to design consistent operating policies in marketing, market research, production, finance and the organizational structure for that product or service (Small business strategy requires imagination, perception and innovation to survive and to grow).

Field work is all important and students will be required to research and report on business enterprises, either founded or taken over by the owner.

This course will also concern itself with ways and means of harnessing business vision, strategy and the operational skills required to avoid or resolve the problems and pitfalls that can so easily sink a venture in its early stages.

CONCORDIA UNIVERSITY

Course Title : Entrepreneurship in Small Business

Course Number: Management 452/4

Program : B.Comm.

Instructor : J.B. Fisher

Entrepreneurship in Small Business results in some of the most dynamic, profitable and interesting firms to be found.

The purpose of the course is to examine the characteristics and motivations of the successful Entrepreneur, his problems, risks, possibilities and rewards in starting a new business or buying an established one.

The creation of a business venture embodying vision is a powerful route to personal change and fulfillment. The entrepreneur is the person who identifies evolving values and needs in society and sets out to meet these needs in the market place with new goods and services. He or she conceives the venture, organizes, manages and assumes the risk of the resulting enterprise.

The essential function of the entrepreneur is to recognize the commercial potential of a product or process or service; to design consistent operating policies in marketing, market research, production, finance and the organizational structure for that product or service. Small business management requires imagination, perception and innovation to survive and to grow. The course will attempt to facilitate an understanding of and insight into the entrepreneurial role requirements, the function of the entrepreneur, the particular characteristics of small business management as well as the necessary elements in successful entrepreneurship.

Students will be required to research and report on business enterprises founded by the owners.

This course will also concern itself with ways and means of harnessing business vision and the practical operational skills required to avoid or resolve the problems and pitfalls that can so easily sink a new venture in its early stages.

The course may encourage students to develop ideas into products or services with potential in the marketplace.

Students interested in this course are advised to interview the instructor.

Text:The Entrepreneurial FunctionText and Cases on Smaller Firms, by Hosmer, Cooper, Jesper.

Class Grades will be based on the following criteria:

A report of a business enterprise founded by the owner with emphasis on aspects of entrepreneurship	70%
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A business plan for presentation to a venture capitalist	30%
	<u>100%</u>

Some Guidelines for Term Paper Topics:

A report of a business enterprise founded by the owner with emphasis on aspects of entrepreneurship.

The world is filled with people who have good ideas, great expectations and fantastic visions. The question is, how can we bring these dreams into reality? Enter the entrepreneur. The entrepreneur is the person who "organizes, manages and assumes the risks of a business enterprise" (Webster's). He or she is the one who identifies evolving values and needs in society and sets out to meet these needs in the marketplace with new goods and services.

For individual entrepreneur, the creation of a business venture embodying his or her vision is a powerful route to personal change and fulfillment, as well as a vehicle for social transformation. The creation of new ventures, the implementation of new ideas and the development of new technologies into practical products is society's lifeblood.

Your concern and focus will include at least the following:

- a. early family history and childhood of entrepreneur
- b. education or lack of it
- c. the essential ingredient(s)
- d. school of experience (time between formal education and starting a business)
- e. the idea stage - reasons for going into business for oneself
- f. setting up the firm: the strategic art
- g. financial problems and attempted solutions
- h. venture financing
- i. characteristics of the industry
- j. nature of the product - raw material, production
- k. history of the business to date
- l. nature of competition
- m. growth crisis
- n. situations in which entrepreneur has to make policy decisions - background and facts available to him/her
- o. you can use these facts or get more information where needed to appraise these policy decisions

- p. situation today and future prospects
- q. your recommendations and impressions as an appraisal of why men become entrepreneurs

Some Questions to Ask Yourself

- 1. Is the entrepreneur an overachiever?
- 2. Is he an agent of change?
- 3. What are his/her motivations?
- 4. What kind of a person is the entrepreneur?
- 5. How are his relations with subordinates?
- 6. What are his problems and dilemmas?
- 7. How is his decision-making ability?
- 8. What are his/her beliefs and values?
- 9. Can entrepreneurship be developed?
- 10. Can entrepreneurship be taught?

Grading of Term Papers

Introduction & Plan	25%
Development	25%
Initiative & Achievement	25%
Conclusion & Insights	25%
	<hr/>
	100%

CONCORDIA UNIVERSITY

Course Title : Managing a Small Business

Course Number: Management 451/2

Program : B.Comm.

Instructor : J.B. Fisher

The purpose of this course is to present a straightforward, fundamental approach to managing a small firm in the Canadian milieu. Attention will be given to the necessary steps in planning, operating, and evaluating a small business concern in Canada. This basic approach will outline steps in planning and operation and explain how each step can best be accomplished. This will include a series of planning and operational areas for a contemplated firm.

Emphasis will be on the important fundamentals such as:

1. Essentials for planning
2. Financing the new firm
3. Form and structure of the firm
4. Merchandising and sales
5. Financial management and control
6. Case studies for illustrative problems

Prerequisite: Accountancy 213, because of the importance of basic accounting principles and statements for more effective decision making.

DALHOUSIE UNIVERSITY

Course Title : Small Business Management

Course Number: 305A

Program : B.Comm.

Instructor :

Texts:

Stegall, Steinmetz, and Kline, Managing the Small Business (Richard D. Irwin, Inc., Homewood, Illinois).

Peterson, Small Business: Building a Balanced Economy (Procépic Press Ltd., Erin, Ontario).

Course Outline:

- Week 1 Introduction to Small Business Management
MTSB, p. 1-22. Peterson, p. 9-19.
- Week 2 Focus of Business Ownership and Laws Affecting Small Businesses.
MTSB p. 43-56, peruse p. 23-42 and 57-76
Peterson, p. 21-30
- Week 3 Buying and selling a business, and preparing prospectus.
MTSB p. 77-114. Peterson, p. 31-54
- Week 4 Management Approach and Planning.
MTSB p. 115-148. Peterson, p. 55-82.

*1st written case handed out.
- Week 5 Business organization and employee relations.
MTSB p. 149-185. Peterson, p. 83-100.

*Oct. 16th! Deadline for submission of organizational study proposals.
- Week 6 Capital needs and Financial Controls
MTSB p. 186-218 Peterson, p. 101-124.

*1st written case due.

- Week 7 Financial Management.
 MTSB p. 219-264. Peterson, p. 125-140.
- Week 8 Company Image and Business Locations.
 MTSB p. 265-304. Peterson, p. 141-160

 *2nd written case handed out.
- Week 9 Operating Facilities and Insurance Needs.
 MTSB p. 305-337. Peterson, p. 161-174.

 *Nov. 16th: 1st draft due on organizational
 study.
- Week 10 Inventory and Productive Controls.
 MTSB p. 337-379. Peterson, p. 175-183
- Week 11 Advertising and Pricing
 MTSB p. 381-422

 *Dec. 1st: Final Draft due on Organizational
 Study.
- Week 12 Marketing Research and Management of Credit
 and Management Assistance
 MTSB p. 423-468.
- Week 13 Final Exam: Date TBA

Course Evaluation:

Class Participation	10%
Written Cases (TWO)	30%
Organizational Study	30%
Final Exam	30%
	<u>100%</u>

Class Discussion:

As this course is organized along the seminar approach students will be expected to participate in class discussion particularly with reference to assigned case studies.

Written Cases:

Two written cases are required of each student. Cases are required to be passed in by the deadline stipulated in the syllabus. Cases handed in late will be penalized 10% per day late. All cases must be typed, doublespaced, with 1" margins, and should be between 3 to 6 pages in length. Cases over 6 pages will not be accepted. Cases will be graded to both form and content: therefore, proper grammar, spelling, and punctuation are expected. Detail relating to case format will be handed out prior to the 1st case being assigned.

Organizational Study:

All students are required to participate in an organizational study of an existing small business. Students may conduct the organizational study by working in groups, however there will be no more than three students per group. It will be the group's responsibility to select and receive permission from a small business to conduct an organizational study, however approval should first be obtained from the professor.

An organizational study will examine all facets of a business including organizational structure, marketing, employee relations, communications, financial controls, etc.

Upon completion of the organizational study a report will be written re: the groups findings. This report should take the form of a consultant's report identifying the company's strengths and weaknesses and making recommendations for change. The first draft of this report will be examined by the professor and the group and any necessary changes will be made. Two copies of the final draft will then be submitted - one to the professor for evaluation purposes and one to the head of the company studied.

Final Exam:

There will be a 2 hr. Final Exam based on assigned readings and class discussion. The exam most likely will consist of two or three essay questions.

DALHOUSIE UNIVERSITY

Course Title : Survey of Business Processes and Retail Management

Course Number: COMMERCE 306B

Program :

Instructor :

Texts:

Archer, Maurice; and White, Jerry. Starting and Managing Your Own Small Business. Toronto: Financial Post/MacMillan, 1978.

Peterson, Rein. Small Business: Building a Balanced Economy. Erin, Ontario: Press Porcépic Ltd., 1977.

WEEK

- 1 Introduction to Small Business Management and Ownership.
Read: Chap. 1, Archer/White
p. 9-19 Peterson.
- 2 Forms of ownership and laws affecting small business - types of small business.
Read: p. 21-30 Peterson
Case Presentation
- 3 Conducting a feasibility study.
Read: Chap. 2 Archer/White
p. 31-54 Peterson
- FIRST QUIZ
- 4 Franchising as an alternative means of ownership?
Read: p. 55-82 Peterson
Case Presentation
- 5 Buying and Selling an Existing Business
Read: p. 83-100 Peterson
Case Presentation
- 6 Financing a Small Business
Read: Chap. 3 Archer/White
p. 101-124 Peterson

WEEK

- 6 cont'd. Mid-term Exam.
- 7 Budgeting for the Small Business
Read: p. 125-140 Peterson
Case Presentation
- 8 Financial Record-keeping for Small Business
Read: p. 141-160 Peterson
Case Presentation
- 9 Marketing and Customer Relations for the Small Business
Read: Chap. 4 Archer/White
p. 161-174 Peterson
SECOND QUIZ
- 10 Inventory and Production Controls
Read: p. 175-183 Peterson
Case Presentation
- 11 Managing and Motivating Employees
Read: Chap. 5 Archer/White
Case Presentation
- 12 Review
FINAL EXAM

Course Evaluation

- 10% Oral Case Presentation
15% Written
25% Quizzes (Two)
25% Mid-Term
25% Final Exam

Case Presentations

Selected groups of students will be expected to present oral and written case analyses re cases to be handed out. The cases will be selected so that they focus on the topic for discussion during the particular week. All students are expected to have read the case prior to presentation and to be prepared to discuss the case.

Quizzes

There will be two announced in-class quizzes which will cover reading materials and lectures and class discussions.

Exams

There will be a mid-term and final exam to be held outside of class hours which will cover all reading material and lectures and discussion to the date of th exam. Each exam will be of equal weight.

DOUGLAS COLLEGE

Course Title : Small Business Management

Course Number: BUS 111

Program : Business Management, Two-Year Career Program/Business Management Certificate Program.

Instructor :

Catalogue Description:

The course is designed for the individual who is facing the problems of currently running a business and of filling the roles of office manager, stock-keeper, salesman and personnel manager.

The day to day administration as well as the overall organization of the business entity (proprietorship, partnership, limited company) will be examined.

Textbooks, References, Materials:

Kelley, Pearce C.; Lawyer, Kenneth; Baumbach, Clifford M.;
How to Organize and Operate a Small Business, Prentice-Hall, Inc.,
Englewood Cliffs, New Jersey

Course Objectives:

The student will:

1. Obtain an overall picture of the channels of distribution and marketing techniques.
2. Become familiar with current legislation as it applies to small business, such as British Columbia Retail Sales Tax, Federal Sales and misc. taxes.
3. Become familiar with ordering, selling, shipping and receiving smaller quantities of goods.
4. Discuss the means of advertising and the cost vs additional return for small firms.

Content:

1. Functions of retailers, wholesalers and manufacturers in today's system of distribution.
2. Business practices: buying goods, purchase orders, invoices.
3. Shipping and receiving of merchandise, with documents used in transportation.

4. Insurance, its function and its various forms.
5. Uses and sources of credit.
6. Uses and sources of loans and rates of interest.
7. Forms of organization - proprietorship, partnership, limited company.
8. Location of a business.
9. Keeping essential records of goods on order, accounts, stock records.

Method:

1. Lectures to impart basic concepts of the running of a small business.
2. Seminar discussions where actual cases will be discussed and the students will offer their opinions on solutions.
3. Actual transport documents, order forms, invoices and stock records will be used by students in seminar sessions.

Evaluation:

Mid-term Exam	20%
Case Studies	30%
Class Participation	25%
Final Exam	25%

UNIVERSITY OF MONTREAL GRADUATE SCHOOL
OF BUSINESS ADMINISTRATION

Course Title: SME Management
Course No: 3-410
Program: Third year of BBA
Professor: Raymond Chaussé

Identification of the defining characteristics of the SME; development and exercise of authority; organization of human resources; the qualities, talents, attitudes, and value system of the president of an SME; relationship between management and property; the strengths and weaknesses of the SME; the family business in Quebec: conditions and problems of growth; the socio-economic role of the SME in the world of tomorrow.

Session 1: The SME in Quebec

- . statistics
- . trends
- . problems

Government policies

Session 2: The SME and its president; comparison with large businesses. The entrepreneur, the boss, the head of the family, man and business

- objectives
- priorities
- operations
- attitudes toward risk-taking

Session 3: The entrepreneur and the manager

- . Case study: Multi-product

Session 4: Organization of an SME

- . specificities
- . development
- . strengths and weaknesses
- . implementing a structure
- . importance of a human, informal atmosphere

- . Case study: Stacey Tile
- . Text: Getting a Grip on Your Organization by L. Fine

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Session 5: The Board of Directors

- . attitudes toward the Board
- . its role
- . activities
 - selection and appointment
 - remuneration
 - mandate
- . responsibilities and obligations

- . Case study: Royal A Industries
- . Text: Le role du conseil d'administration by L Roquet

Session 6: Planning

- . planning for change
- . importance of change
- . rate of change
- . attitudes toward change

- . Case study: Caravane Var-Bar
- . Text: Approaches to Long-Range Planning for Small Businesses
by G Asteiner

Session 7: Finances

- . sources of financing
- . financing from the user's point of view
- . assessing a business
- . acquiring a business
- . mergers

Case study: Legrand Printing and Montpetit Hubbard Company

Session 8: Starting a Business

- . market studies
- . choosing a field
- . identifying a need
- . from the idea to the product
 - incubation period
 - decision-making period
- . critical elements of the implementation stage
- . application

- . Case study: Margaret Brooke
- . Text: Marketing Myopia by T Levitt

Session 9: Sales administration

- . sales policy
- . sales budget
- . selecting distribution channels
- . sales force

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ADMINISTRATION

- supervision
- selection
- training
- payment

. Case study: Monsieur Contrôle

Session 10: Control

. Case study: General Glass

Session 11: Growth

- . Case study: Les Bonbons Belvedair Inc
- . Text: Critical Stages of Small Business Growth

Session 12: Survival

. Case study: La Laiterie Lavallée Inc

Evaluation:

term work: 80%
class participation: 20%

Term work:

One paper (minimum 25 pages) and a class presentation, both on a topic related to SME management.

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ADMINISTRATION

Course title: Entrepreneurship
Course No: 5-011
Program: second-year MBA
Professor: Jean-Marie Toulouse

This course is for students who wish to set up a business in the short or medium term. It focusses on the creation of a business, and aims to help students make definite plans for this, to examine the dynamics between the entrepreneur and his/her business, and to reflect on entrepreneurial activity in the Quebec community.

Course requirements:

- Conduct an interview and from it derive a case study to be presented and discussed in class
(due: 1 October 1978) 25% of final mark
- 6 reports on readings
(due: 30 November 1978) 25% of final mark
- Options 50% of final mark

Present a detailed plan for the creation of a business
See: "Le plan d'affaires"

or

Analyse entrepreneurial activity in the city of Laval

or

Write a theoretical paper on a topic related to the course that is of interest to the professor and the student
(due: 10 December 1978)

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- Required reading for all students (may not be used for reports):

- . Toulouse, J-M Entrepreneurship au Québec
- . Toulouse, J-M Entrepreneurship--Textes et Cas

PART 1: CHARACTERISTICS OF THE ENTRENEUR: THE DECISION TO START A BUSINESS

Session 1:

Exercises: . The ideal entrepreneur
. Hidden words

Talk: Models for describing entrepreneurship

Reading: Entrepreneurship, Chapter 1

Session 2: Risk-taking

Exercises: . Multiple choice
. Ring game

Reading:

Session 3: Development

Exercises: . Technological innovations
. Brainstorming: requirements of our environment

Reading: Les entreprises fondées au Québec, depuis 1917

Session 4: Interviews with entrepreneurs

Between sessions 3 and 4, groups of ten students will interview an entrepreneur. The interview should cover the topics listed in the interview guide. During session 4, each of the interviews will be presented as a case study.

Session 5: Case studies

For this session, the student must read and report on three texts of his/her own choosing from the list "Complementary readings". The report shall consist of an indication of the student's ideas and reactions regarding the text.

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- . Case studies: . Le rasoir (a success)
 - . Mimi
 - . TBA
- . Exercise: International In-Basket
- . Conclusions:
 - . entrepreneurial characteristics and individual characteristics
 - . decision-making dilemmas in starting a business

Session 6: "Jeunes Entreprises" project

This session will be held at the offices of Jeunes Entreprises in Montreal.

Complementary Readings

- ANON : "Koffler of Koffler Stores: A No Fuss Entrepreneur". Executive, March 1977, Vol 19, No 3, pp 53-62.
- GASSE, Y : Modèle d'entrepreneurship: profils et rôles. University of Sherbrooke, research paper No 76-1.
- KETS DE VRIES,
M F R. : "The Entrepreneurial Personality: A Person at the Crossroads". Journal of Management Studies, 1977, Vol 14, No 1, pp 34-57.
- LILES, P : "Who Are the Entrepreneurs?". M.S.U. Business Topics, Winter 1974, Vol 22, No 1, pp 5-14.
- LITVAK, I A
&
C J MAULE : "Profiles of Technical Entrepreneurs". The Business Quarterly, Summer 1974, Vol 39, No 2, pp 40-49
- MACRAE, N : "The Coming Entrepreneurial Revolution: A Survey". The Economist, December 25, 1976, pp 41-65.
- PAQUET, G : "French-Canadian Entrepreneurship: Quebec Must Design its Own Brand". The Business Quarterly, Summer 1972, Vol 37, No 2, pp 36-41.
- ROBIDOUX, J
&
A CLOUTIER : Profil sélectif d'entrepreneurs exploitant des entreprises à succès. Research report, University of Sherbrooke.

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- SHAPERO, A : "The Displaced Uncomfortable Entrepreneur".
Psychology Today, Nov 1975, pp 83-89.
- SWANN, K : "Entrepreneurship in Large Companies".
Journal of General Management, Summer 1975,
Vol 2, No 4, pp 48-54.
- TOULOUSE, J -M : Stades de développement de l'entreprise
et les défis pour l'entrepreneur.
- TOULOUSE, J -M
A LAPOINTE &
R BERUBE : "Une étude préliminaire de l'élite économique".
Commerce.
- WEBSTER, F A : "Entrepreneurs and Ventures: An Attempt at
Classification and Clarification". Academy of
Management Review, Jan 1977, Vol 2, No 1, pp 54-61.

PART 2: THE ENTREPRENEUR IN THE BUSINESS WORLD

In this part students are asked to form groups depending on their interest in one of the following three options:

OPTION A: Objective : to create a business in the short term

Requirement: prepare a business creation plan and discuss it in class

Readings : It is suggested that the student become familiar with all the texts, but written reports must be handed in on three texts.

- BATY, G B : Entrepreneurship: Playing to Win. Preston Publishing Co., Preston, 1974.
- BROOM H N
&
J G LONGNECKER : Small Business Management. 4th ed., South Western Publishing, Cincinnati, 1975, Part C, pp 197-280.
- MANCUSO, J : The Entrepreneur's Handbook. Artech House, 1974, chapters 2 and 3.

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OPTION A Readings (continued)

- TATE, C
et al. : Successful Small Business Management. Business
Publication Inc., 1975, Dallas, Part II
"What is your business?", pp 51-144.
- WHITE, R M : The Entrepreneur's Manual. Chilton Book Co.

OPTION B: Entrepreneurial activities in large businesses

- Objective : to examine the participation of big business in
"development" activities
- Requirement : analyse how two large businesses with head offices in
Montreal have approached the question of the
development of new services or new products
 . internally
 . externally (joint ventures, franchises, etc)
- Readings : The student must hand in three reports on readings.
- AMMER, D S : "Has Big Business Lost the Entrepreneurial Touch?".
Business Horizons, December 1970, Vol 13, No 6,
pp. 37-46.
- COPULSKY, W
&
H W McNulty : Entrepreneurship and the Corporation. Amacon,
1974.
- HANAN, M : Venture Management: A Game Plan for Corporate Growth
and Diversification. New York, McGraw -Hill, 1976.
- LITVACK, E
&
C MAULE : "Managing the Entrepreneurial Enterprise". The
Business Quarterly, Summer 1972, Vol 37, No 2,
pp 42-50.
- SCHUMAKER, C F : Small is Beautiful. (London) Abacus, 1973.
- WESTFALL, S L : "Stimulating Corporate Entrepreneurship in U. S.
Industry". Academy of Management Journal,
June 1969, Vol 12, No 2, pp 235-246.

OPTION B Readings (continued)

- WILEMON, D L
&
G R GEMMIL : "The Venture Manager as a Corporate Innovator".
California Management Review, Fall 1973, Vol 16,
No 1, pp 49-56.

OPTION C: Entrepreneurship and economic development

Objective: summary analysis of the creation of business, economic influence and development

Requirement: evaluate the economic value and the foundation of a business or businesses in Laval

Readings : Three reports on readings are required.

- DESROSIERS, R F : "La question de la non-participation des Canadiens français au développement industriel au début du XXIème siècle". Economie québécoise.
- DUROCHER, R
&
P A LINTEAU : Le retard économique du Québec et l'infériorité économique des Canadiens français. Trois-Rivières, Les éditions Le Boréal Express.
- HARVEY, P : "Esprit d'entreprise et développement régional". 7th International Congress on Regional Economies.
- HANNART, M : "Liberté d'entreprendre et développement régional". 7th International Congress on Regional Economies.
- KILBY, P : Entrepreneurship and Economic Development. New York: The Free Press; London: Collier McMillan, 1971.
- LEIBENSTEIN, H : "Entrepreneurships and Development". American Economic Review, May 1968, Vol LVIII, No 2, pp 72-83.
- MCCLELLAND, D C : The Achieving Society. New York, Irvington Publishers, 1976.
- PAZ, J : "Esprit d'entreprise et le développement régional". 7th International Congress on Regional Economics.

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Sessions 6 to 13 will be devoted to discussion of the three options. Students will present their work at each session. The presentations will be supplemented by lectures, discussions, and meetings with entrepreneurs.

UNIVERSITY OF MONTREAL
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ADMINISTRATION

Course title: Financial Problems of Small and Medium Enterprises

Course No : 3-204

Program : third-year BBA

Professor : Benoît Deschamps

Required readings:

FINANSIM - A Financial Management Simulation, by P S Greenlaw and M W Frey, International Textbook Company, 1967.

Collections of articles and case studies, on sale at the co-operative.

Course outline

<u>Session</u>	<u>Topic</u>
1	Introduction
2	Overall view of sources of financing prepare: Médium reread: Chartered Banks (collection II-200) FINANSIM: hand in team compositions (with distribution of tasks) hand in trial first decision
3	Short-term financing I prepare: Graphic Film A read: Les sociétés de factoring (text on factoring companies) FINANSIM: hand in corporate objectives hand in real first decision
4	Short-term financing II prepare: Graphic Film B FINANSIM: hand in second decision, first one-page report and pro-forma financial statements
5	Bank financing--SMEs in financial difficulty prepare: Sherbrooke Industrie
6	Financing international trade prepare: AP & M Trading Co read: Chapter 22 of <u>Monnaie et Banque</u> , by Boreham, Shapiro, Solomon, and White (to be distributed in class)
7	Introduction to term financing prepare: Tétreaultville Machine Works read: Note on the use of REPORT program FINANSIM: hand in one-page analysis of discrepancy between your final predictions and final results (balance sheet and profit and loss statements)

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Midterm examination week

- 8 Choosing a capital structure
prepare: Crédit Beauchastel
read: Le prêt à terme (document on term loans)
- 9 Financing decisions - acquiring a company
prepare: case study (TBA)
skim: Normick Perron (bring to class)
FINANSIM: hand in one-page description of your financial policy
(debits, dividends, issuance of shares)
- 10 Assessing SMEs
prepare: Hubbard
prepare: J R Sanford A
FINANSIM: hand in a one-page description of your investment policy
- 11 Assessment and risk-capital companies
prepare: John Buckley and Pacific Electronics (these two case
studies go together)
FINANSIM: hand in two decisions
- 12 Varieties of private investment in stocks
prepare: Diffusion Québec
read: Les SODEQ
La Société de Développement Industriel
- 13 Summary
prepare: case study TBA
FINANSIM: presentation of reports to Board of Directors. This
includes a 10-minute oral presentation, followed by
by a question period, and a short written report of
2-3 typed pages maximum.

Course organization and objectives

The course is divided into four sections: introduction; short-term and bank financing; term financing; assessment and risk capital. There will be a summary of the main points at the end of each section.

This division is artificial in that each section is related to the others. In the real world, it is impossible to deal with one point without touching on the others. Furthermore, even if a case study is the most faithful representation possible of a real situation, decisions made in class can never have the same effect as those made within an actual SME: when the class is over, we don't have to live with the consequences of our decisions. Decision-making in the FINANSIM business game solves these two problems at least partially: decisions made in one area affect all areas of the business, and the players have to live with the decisions they have made. Furthermore, concepts such as mobility and flexibility in business and the importance of keeping financial reserves are illustrated much more clearly in FINANSIM than if they were presented and discussed in class. Lastly, the importance of financial analysis in planning is placed in proper perspective.

At the end of the course, students should be able to analyse the financial situation of an SME, propose corrective action or other measures, and prepare a financial dossier.

Although this is a finance course, it attempts to diagnose the financial problems of SMEs in a much broader perspective. How realistic suggested solutions are can better be judged in terms of the type of business, its size, and its general setting than by theoretical orthodoxy.

Course requirements

For FINANSIM, the class must divide into groups, consisting of no fewer than three persons and no more than four (no exceptions will be allowed). Just as in business, tasks are assigned to each member, in such a way that the work load is distributed fairly and each person's time is used efficiently. For example, the group can designate one person as co-ordinator (president of the company), another to be in charge of financing and pro-forma statements, and a third to be in charge of investment and production decisions. It is strongly recommended that these groups meet to discuss the case studies together.

Preparing case studies

Students must hand in a written analysis of eight of the 13 case studies assigned for the term. They should be no longer than two pages (plus no more than two pages of attached tables, such as pro-forma balance sheet). If you hand in a longer report, indicate on the first page which pages should be marked. Once you have read the case study, you should spend no more than two hours preparing the report.

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Each of these eight reports will first be classified as satisfactory or unsatisfactory. Unsatisfactory reports will be returned to the student as soon as possible. Next, four of the eight, selected at random, will be marked: A 90%, B 80%, C 70%, D 60%, and F 0% (unsatisfactory report). Reports will be handed back twice during the semester: once before the midterm exam and once before the final exam.

c. FINANSIM business game

Students are not required to do computer work for this game.

- i. The make-up of the groups, the company name, and the task assignments are due on 12 September, as well as the first decision. This will be a "trial", so that students can familiarize themselves with FINANSIM. It will help them make the real first decision.
- ii. The first real decision is due on 19 September, along with the corporate objectives of the group (one page). Indicate how your company intends to meet these objectives (strategy).
- iii. Beginning on 26 September, pro-forma financial statements must be handed in along with each of the decisions. These need not follow the four commandments of the CICA. You should not spend too much time preparing them: they are only a representation of your planning for the FINANSIM decisions. The pro-forma statements must be accompanied by a one-page group report, of which the first half analyses the present situation and the second half justifies decisions and changes in policy.

Decisions must be handed in at the beginning of each class. If a decision is not handed in on time, it will be replaced by the last decision the group made. Barring unforeseen circumstances, the results should be available in Office 6203 by the following Friday morning at the latest.

- iv. A one-to two-page group report on financing policy is due on 7 November.
- v. A two-page group report on investment policy is due on 14 November.
- vi. Two decisions (instead of just one) must be handed in on 21 November.
- vii. Each group must hand in a short report on 5 December, analysing its performance for the semester. Each group must also present its report to the Board of Directors (ie the class). The Board will ask questions about the administration of the company.

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ADMINISTRATIONEvaluation

Individual reports on case studies (corrected reports count for 12%)	15%
FINANSIM	25%
Midterm exam	25%
Final exam	35%
	<hr/>
	100%

Final marks will be raised by at least five points for members of the team that provided its shareholders with the highest yield.

The evaluation for FINANSIM is based on quality of term reports, company performance, the presentation to the Board of Directors, and questions put to other teams.

It is suggested that the class set up a "kitty", to be divided, at the end of the course, among members of the company or companies with the best performance.

UNIVERSITY OF MONTREAL
GRADUATE SCHOOL OF BUSINESS
ADMINISTRATION

Course title: Financial Problems of SMEs

Course No : 5-205

Program : second-year MBA

Professor : Jean Guertin

Course objectives and method:

Management problems faced by smaller businesses will be illustrated, primarily through the examination of case studies representing financial problems whose analysis and solution cannot be dissociated from the size of the business in question and its immediate environment. The requirements of the situation and imaginativeness of decisions may often run counter to theoretical orthodoxy.

This course is intended for action-oriented people who want to become entrepreneurs or who expect to work with entrepreneurs (eg finance companies). There are few relevant readings available, so we will rely on an analysis of financial institutions and on case studies. Most of the material is from Quebec.

The course will examine how an entrepreneur can analyse financial problems and what possible solutions are open to him or her. Decisions for action must take into account the size of the business, the special constraints the SME works under, the entrepreneur's personality, and the special characteristics of the Quebec environment. In the first classes we will attempt to situate the SME in this perspective.

Place in the program

Given the nature of the problems to be discussed, a basic course in finance is more than sufficient as a prerequisite. Several students may wish to complete their study of the SME with courses in management accounting and taxation. Others will be interested in a general marketing course and human relations. Knowledge of general administrative policies is obviously a requirement.

I would like this course to be conducted in as broad a context as possible, to touch upon other administrative functions, and--especially-- to bring them together and to provide a summary of them. The entrepreneur must be multi-talented: this is the main challenge. The problems he or she will face do not always call for highly sophisticated (and often costly) solutions of the kind big business can afford.

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This philosophy, it seem to me, lends itself very well to structured discussion of case studies, chosen for their relevance to our business environment and their institutional content. I will invite various persons to come in on several occasions to discuss their experience in SMEs or in institutions that serve SMEs.

<u>SESSION</u>	<u>TOPIC</u>
1	Introduction
2	Introduction (continued) Eskay Plastics A--reread
3	Graphic Film A--short report
4	Graphic Film B (to be distributed)--short report
5	Lady Picolette--short report
6	Sherbrooke Industries--short report
7	A Schwartz and Co (to be distributed) <u>GROUP REPORT</u>
8	Summary: short-term financing and relations with the bank
9	Presentation: growth financing and sources of long-term financing
10	Tétreaultville Machine Works--short report
11	Crédit Beauchastel <u>GROUP REPORT</u>
12	TBA--short report
13	Summary: growth financing and sources of long-term financing
14 and 15 (8:30-11:15)	Sources of government assistance
-	No class (double session on financial markets)
16	The SME on the international scene
17	Presentation: assessing SMEs Hubbard Co--short report
18	Normick Perron--read Hartman Mouldings A--read Hartman Mouldings B (to be distributed)--read
19	Summary: assessing SMEs Cutter and Dunlop--read Wizard Corporation (to be distributed)--short report
20	Acquiring or launching an SME, risk capital John Buckley--read Pacific Electronics--short report
21 and 22 (8:30-11:15)	The SME and taxation

<u>SESSION</u>	<u>TOPIC</u>
-	No class; double session on financial markets
23 and 24 (8:30-11:15)	J.R. Sanford A--short report
-	No course; double session on financial markets
25	Plastibec--short report
26	Medium--short report Risk capital companies
27	Diffusion Québec <u>GROUP REPORT</u>
28	Radio St-Simon (to be distributed)--read Summary: Acquiring or launching an SME; risk capital Course summary.

NOTE: There are three double sessions: 14 and 15, 21 and 22, and 23 and 24. In each case, the following class is cancelled. I will try to remember this, and I hope you will, too.

Course divisions

Classes 3 to 8: Relations with the bank and short-term financing

Classes 9 to 13: Growth financing and sources of long-term financing

Classes 17 to 19: Assessing SMEs

Classes 19 to 28: Acquiring or launching an SME, risk capital

Obviously, these divisions are not perfectly homogeneous--each overlaps into the others. Classes on more specific subjects are inserted periodically--for example, sessions 14, 15, and 16.

Within each division, we will attempt to use the following approach:

- identification of problems
- characteristics of Quebec business environment
- presentation of dossiers and projects
- overview

Readings:

Readings are scarce and of erratic quality. There is an "SME Collection" on reserve at the library, which contains a variety of selections. An annotated bibliography will be distributed, which should help relate these texts to certain sections of the course.

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Don't forget the three GSBA texts distributed last year in Finance IV-200, which are listed in the table of contents of the codex. Come see me if you do not have these texts.

Evaluation

- individual short reports (one for each case study, except those marked "read" only)	30%
- three group reports (longer)	30%
- exam (case study)	40%
	<u>100%</u>

Note:

1. Some pessimistic students have inquired about make-up evaluation. Make-up work will consist of one case study, and the result will replace all earlier marks except the 30% for individual short reports.
2. As far as I am concerned, participation is your contribution to the orderly, intelligent presentation of a case study, as specified in the philosophy of the course on page 1. Your preparation will of course be evaluated, but so will your ability to advance the discussion productively. The quality of your participation is more important than the quantity (motor mouths, please take note). Evaluation will be done at the end of each class, to avoid wholesale judgments at the end of the semester.

Course work

- read and prepare case studies, as assigned throughout the term; hand in a one- to two-page report on each case (unless otherwise instructed);
- for classes No 7, 11, and 27, a group report is required. These should discuss specific questions, and be 8-10 pages long.

Groups should consist of three to four people. Reports will not be handed back; make copies if you want to keep them.

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Course title: Seminar on Marketing in SMEs

Course number: 5-156

Level: Second-year MBA

Professor: C Choquette

The objective of this course is to help students develop an operational approach to setting marketing planning policy in an SME. Students will be expected to:

1. apply basic concepts such as learning curves, product life cycles, adoption and penetration curves, marginal contribution, and segmentation to the planning process;
2. determine and evaluate short- and medium-term economic growth objectives;
3. integrate these concepts into a marketing plan;
4. evaluate marketing plans in terms of their financial interfaces;
5. devise an organizational development plan compatible with market receptiveness.

FANSHAWE COLLEGE

Course Title : Small Business Management

Course Number: Management 501

Program : Business Administration

Instructor : M. J. Hennessy

General Objective:

The course enables the student to acquire an understanding of the operation of a small business including the considerations to be taken in establishing the small business and the functions to be performed to maintain the effective performance of the business.

Course Organization:

The areas of study consist of 3 major sections: (1) Basic Steps in Planning a Small Business, (2) Effective Operation of a Small Business, (3) Maintaining a Comprehensive Operating Plan for a Small Business.

Student Entry Level:

. No prerequisites.

Student Evaluation:

The student's performance throughout the course will be measured as follows:

4 Assignments	50%
Class Participation	10%
1 Test (End of Semester)	40%

Class participation is based on the personal observation of the instructor.

Grading System:

"A"	=	80% plus
"B"	=	70% - 79%
"C"	=	60% - 69%

NOTE: A "C" is the minimum required to complete this course.

Assignments:

- #1 - Prepare and submit, "A List of Assets to be Used".
- #2 - Prepare and submit, "A Simple Break-Even Chart".
- #3 - Prepare and submit, "An Income Statement".
- #4 - Prepare and submit, "A Cash Flow Chart".

NOTE: Instructor will prepare assignments as above and will establish the schedule for submission of assignments.

Reference:

Required text: Running Your Own Business - Financial Post.

Teaching Methodology:

Lessons will be conducted as follows:

- Subsequent to lesson #1, students are expected to have read the reference material prior to the commencement of a lesson. Instructor will assign references.
- The instructor will lecture on the lesson, using illustrative examples wherever possible.
- Students should prepare questions between periods of instruction if they are having difficulty with any topic. The instructor will clarify the problems before proceeding to the next topic.
- Students will be given discussion questions where relevant to reinforce concepts covered in class.
- Periodically, the students will be given assignments to complete in order that the instructor may evaluate the student's performance.

OUTLINE

Section One

Fourteen Basic Steps in Planning a Small Business:

- 1.1.1 Determine what profit you require from the business.
- 1.2.1 Survey the market you plan to serve.
- 1.3.2 Prepare a statement of assets to be used (assignments).
- 1.4.1 Prepare an opening day balance sheet.
- 1.5.1 Study the location and specific site chosen.
- 1.6.1 Prepare a layout for the entire space to be used.
- 1.7.1 Choose your local form of organization.
- 1.8.1 Review all aspects of your merchandising plan.
- 1.9.1 Analyze your estimated expenses, determine fixed and variable expense.

- 1.10.2 Determine the firm's Break-Even Point (assignment).
- 1.11.2 Establish a credit policy
- 1.12.1 Review the risks.
- 1.13.1 Establish a personnel policy.
- 1.14.1 Establish a adequate system of accounting records.
- 1.15.2 REVIEW SECTION ONE

Section Two

Effective Operation of a Small Business:

- 2.1.2 How to go about finding the extra money you need.
 - Inventory Reduction
 - Receivable Reduction
 - Improved Trade Credit
- 2.2.2 Purchase of capital equipment
 - Investment
 - Annual Saving
 - Pay Back Time
- 2.3.2 How can you plan ahead (assignment)
 - Balance Sheet
 - Income Statement
 - Past Records
 - Inventory Control
- 2.4.2 Financial Control
 - Accounting - Data
 - Analysis
 - Action
 - Goal
- 2.5.2 Business Risk
 - Fire
 - Natural Hazards
 - Theft
 - Liability
 - Non-owned Auto
 - Embezzlement
 - Bad Debts
- 2.6.2 Commercial Bankruptcy
 - What happens?
 - Creditor
 - Debtor
 - Bankruptcy Act (Canada)
- 2.7.2 Taxes
 - Individual
 - Corporate
 - Federal
 - Provincial
 - Succession Duties
 - Capital Gain
 - Capital Losses
- 2.8.2 REVIEW SECTION TWO

Section Three

Maintaining a Comprehensive Operating Plan for a Small Business:

- 3.1.3 How to make an operating forecast (assignment)
 - Capital invested
 - Property owned
 - Equipment
 - Leased premises
 - Debts
 - Customer accounts
 - Special payments
- 3.2.3 Where to look for outside financing?
 - Private
 - Banks
 - Government - Direct - Indirect
 - Federal Grants
- 3.3.3 How to motivate salesmen
 - Straight salary
 - Straight commission
 - Salary plus an incentive plan
- 3.4.3 REVIEW SECTIONS ONE, TWO & THREE
- 4.5.2 FINAL TEST

HUMBER COLLEGE OF APPLIED ARTS AND TECHNOLOGY

Course Title : Retailing - Small Store Proprietorship

Course Number: 247-010

Program : Business Administration

Instructor : Joan T. Rutherford

Text:

Small Store Proprietorship, (Manual/Workbook, 4th Edition), (Revised 1977)

Control Over Direct Costs and Pricing, Planning and Budgeting, Royal Bank of Canada, Your Business Matters, Series #6 and #7.

Objectives and Description:

The purpose of this course is to provide for the student a practical awareness of today's retailing scene, particularly as it pertains to the small independent store. It is also designed to develop learning skills in decision-making creative research, merchandising judgment, planning, analysis, and calculations.

The pedagogic objective of the course is learning through action (Praxis), and thus considerable emphasis is placed on work carried out in the classroom. This approach will include dialogue and assessment of specific guidelines.

In this term-long Project, the student is given the hypothesis that he/she has fifteen weeks in which to prepare for the launching of his/her own independent store. This enterprise, to be successful, will require that all relevant factors and elements must be thoroughly assessed, and worked out in detail. A choice of 20 types of stores is offered; students to "clear" their own choice of store by the end of the second week.

The Manual represents much more than a theory and principles textbook; rather, its ten work phases are to be considered a cohesive series of assignments or exercises leading to completion of the major Project, which is in fact the Course.

All phases must be submitted in "final form" for marking, according to the schedule of due dates which follows. Work submissions are to be neatly and concisely written, printed, or typed, and must demonstrate acceptable standards of English for the student to successfully complete this course.

A considerable portion of the Project's factual and procedural content will be available only in class, and it is intended that such material be developed substantively in the classroom. (Learning Aid Approach). This should suggest to the earnest student that class attendance is imperative.

<u>Phase No.</u>	<u>Content Area</u>	<u>Week Due*</u>
1	Retail Environment Today Future of the Small Independent Store	2nd
2	Choice of Location and Site (and Factors thereto)	4th
3	Interior Layout Plan with Fixturing, and Store Front Drawing	7th
4	Summary of Fixtures, Equipment, Lighting, with Cost Estimates	7th
5	Organization and Staffing, with Cost Estimates	9th
6	Advertising & Promotion Plans with Cost Estimates	10th
7	Administration, Buying Approach, Ordering, Control Records, Bookkeeping Systems	10th
8	Planned Stock Assortment (Model Stock)	12th
9	The Merchandise Plan (Budget by Months)	14th
10 (a)	Financial Budgets. Income Statement	15th
(b)	Balance Sheets	

All phases are non returnable.

*Deadline time to be taken as the start of the last class of the week specified. No "make-ups" will be permitted, nor individual extensions beyond due date.

Class Format:

It will clearly be in the student's interest to meet the foregoing phase deadlines in this challenging course. Note that Phases 3 and 4 are interrelated, and therefore are to be submitted conjunctively.

Grading:

In addition to the ten phase marks, the grading system provides for two important personal evaluations, one at the mid-term and the other in the final grade. Thus the student will be assessed on twelve progressive marks during the semester, with the advantage that he can judge his current status at any time. There is no final exam.

The Evaluation Scheme Comprises:

85 - 100% = 4 = Excellent
75 - 84% = 3 = Proficient
60 - 74% = 2 = Satisfactory
50 - 59% = 1 = Deficient
0 = Failure

HUMBER COLLEGE OF APPLIED ARTS AND TECHNOLOGY

Course Title : Starting a New Business
Course Number: 240-011
Program : Business Administration
Instructors : Stanley A. Shaw/Robert Caco

Text:

Small Business Management A Guide to Entrepreneurship, N.C. Siropolis,
Houghton Mifflin Company

Course Description and Objectives:

The objective of this course is to enlighten the prospective entrepreneur on how to start up a business. Secondly, to familiarize students with the basic parts of a small business - and how they interact and reinforce each other to form a dynamic whole. Thirdly the course will encourage students to develop the habit of thinking analytically and deal decisively with operational problems.

To meet these objectives, the course is orgnized in three parts:

- Part I An Overview of Small Business
- Part II Starting the New Venture
- Part III Planning for the Ongoing Venture

To prevent duplication, the store models used in Retailing I (Small Store Proprietorship) are not permissible in this course.

Course Contents

<u>WEEK</u>	<u>TOPIC</u>	<u>TEXT REFERENCE</u>
1	PART I <u>Introduction to Entrepreneurship In Canada</u>	
	1. Decisions for entering self-employment	Chapter 1, 2, 3
	2. Self-analysis; Entrepreneurial Traits	
	3. Present visualization of the business idea and personal questionnaire	
2	PART II <u>Starting a New Venture</u>	
	(a) Search for a New Venture	Chapter 3, 4, 10

<u>WEEK</u>	<u>TOPIC</u>	<u>TEXT REFERENCE</u>
	<ol style="list-style-type: none"> 1. Choice of a Product of Service 2. Buying out an Existing Business, Franchising 3. Starting from Scratch 	
3	(b) Planning and Organizing a Business Plan	Chapter 5, 11
	<ol style="list-style-type: none"> 1. Developing a Business Plan - Outline 4 stages of growth 2. The Initial Projected Income Statement 	
4	(c) Marketing Research	
	<ol style="list-style-type: none"> 1. Forecasting Sales Revenue 2. Readjusting the Projected Income Statement 3. Planning Strategy; begin Market Program 	Chapter 7, 14
5	(d) Legal Form and Structure of the Business	Chapter 6, 7
	<ol style="list-style-type: none"> 1. Location Analysis 2. Layout design if appropriate to your Business 3. Legal Form of Organization, licenses, permits, etc. 	
6	(e) Financing the New Venture	Chapter 8, 10, 11
	<ol style="list-style-type: none"> 1. Sources of Financing - start up 2. Statement of Assets to be used 3. Opening Day Balance Sheet 	
7	PART III <u>Planning for the On Going Venture</u>	
	(a) Financial Management and Control	Chapter 11, 12
	<ol style="list-style-type: none"> 1. Financial records, budgets 2. Cash Flow 3. Break-Even Analysis 	
8	(b) Financial Management & Control	Chapter 13, 19
	<ol style="list-style-type: none"> 1. Financing the Ongoing Venture 2. Insurance Needs for the Business 	
9	(c) Operating the Business	
	<ol style="list-style-type: none"> 1. Developing a Marketing Plan 2. Credit Policy 	Chapter 14, 15

<u>WEEK</u>	<u>TOPIC</u>	<u>TEXT REFERENCE</u>
10	(d) Personnel & Employee Relations 1. Manpower Planning 2. Human Relations in the Ongoing Venture 3. Utilizing "outside staff" services.	Chapter 9, 16
11	(e) Purchasing & Inventories 1. Sources of Supply 2. Inventory Management	Chapter 17
12	(f) Production Planning & Control 1. Developing a Production Plan 2. Proto-type design, patents, copyright, trademarks	Chapter 4, 5
13	(g) Maintaining a Dynamic Enterprise 1. Avenues of growth 2. Common causes of failure 3. Problems in Planning Future Expansion	Chapter 3, 5, 9
14	(h) Evaluation of Business Plan 1. Checklist of steps	Chapter 5

Class Format:

The plan of the course is first to give the student an overview of the Canadian business environment and then to proceed, in short digestible sections, with a series of planning steps so as to create a business plan. By means of case study analysis, class exercises and a term-long project, the student who successfully completes this course should be in a position to launch and operate his or her own business.

Furthermore, the student will be required to prepare an operating manual or business plan on an on-going basis for a specific business. The business model must be approved by the instructor before the student undertakes the on-going project. The introduction to each section of the project will be handled in class on a short discussion basis.

Student Evaluation:

Progressive evaluation is the basis for student evaluation in this course. Therefore, the student will be graded on an on-going on the major project. The project will be programmed into a series of phases

throughout the term. At the instructors discretion, a schedule of due dates will be issued according to which of the phases must be submitted in final form for marking. Also at the instructor's discretion, an oral presentation of the major project may be scheduled during the term.

Course Grading:

Major Project (Business Plan)	80 points
Mid-Term Test (optional)	10 points
Participation and/or Oral Presentation	<u>10</u> points
Total	100 points

HUMBER COLLEGE OF APPLIED ARTS AND TECHNOLOGY

Course Title : Small Business Management (Equine Studies)

Course Number: 251-015

Program :

Instructors : Stanley A. Shaw/Robert Caco

Text:

Small Business Management A Guide to Entrepreneurship
N.C. Siropolis, Houghton Mifflin Company

Course Description and Objectives:

This course has been prepared for students who will be working in one of the various businesses associated with the equine industry. Most such operations are small to medium sized and there are many opportunities for eventually owning one's own business or running a business for investors.

The objective of this course is to familiarize students with the basic parts of a small business - and how they interact and reinforce each other to form a dynamic whole. Also the course will encourage students to develop the habit of thinking analytically and dealing decisively with operations problems which involve planning, organizing and controlling.

To meet these objectives, the course is organized in four parts:

- Part I An Overview of Small Business
- Part II Starting the New Venture
- Part III Planning for the On Going Venture
- Part IV Analysis and Comparison of Various types of Business in the Horse Industry.

COURSE CONTENTS

<u>WEEK</u>	<u>TOPIC</u>	<u>TEXT REFERENCE</u>
1	Part 1 <u>Introduction to Small Business</u>	
	- Decisions for entering small business	Chapter 1, 2, 3
	- Entrepreneurial traits	
	- Personal questionnaire	

<u>WEEK</u>		<u>TOPIC</u>	<u>TEXT REFERENCE</u>
2	Part 11	<u>Search for a New Venture</u>	
		- Choice of Product or Service	Chapter 3, 4
		- Buying Out an Existing Business	
		- Starting from Scratch	
3		<u>Developing a Business Plan</u>	Chapter 5, 11
		- Need for Planning	
		- Present Visualization	
		- Business Plan Format	
4		<u>Researching the Market</u>	Chapter 7, 14
		- Forecasting Sales Revenue	
		- Planning Strategy for the Marketing Plan	
5		<u>Legal Form and Location</u>	Chapter 6, 7
		- Location Analysis	
		- Legal formation - proprietorship, partnerships corporation	
6		<u>The Law of Contracts</u>	Chapter 15
		- Contracts of Purchase and Sale	
		- Contracts of loan and indebtedness and associated instruments	
		- Leasing agreements.	
7	Part 111	<u>Planning for the On-going Venture</u>	Chapter 8, 10, 11, 13
		- Sources of Financing	
		- Financial Statements	
		- Depreciation (effect on cash flow)	
		- Record keeping	
8		<u>Planning and Controlling</u>	Chapter 11, 12
		- Projected Income Statements	
		- Cash Budgets	
		- Break even point analysis	
9		<u>Management and Personnel Functions</u>	Chapter 16, 20
		- Planning, Organizing and Staffing	
		Functions of Management	
		- Performance Evaluation	
		- Safety Program	
		- Social Responsibility	

<u>WEEK</u>	<u>TOPIC</u>	<u>TEXT REFERENCE</u>
10	<u>Business Operations</u> - Purchasing and Inventories - Taxation - Insurance needs	Chapter 17, 18, 19
11 & 12	<u>Observation of Business</u> <u>Conditions during field</u> <u>Field Placement - Checklist</u>	Chapter 5
13 & 14	<u>Analysis and Comparison</u> <u>of various types of business</u> <u>in the horse industry</u> - Boarding stables - Racing stables - Riding Establishments - Tack Shops and Supply Houses - Race Tracks and Jockey Clubs	
15 & 16	<u>Evaluation of Business Plan</u> - Checklist of steps - Presentations	Chapter 5

Class Format:

The plan of the course is first to give the student an overview of the business environment and then to proceed, in short digestible sections, with a series of planning steps so as to create a specific business plan relating to some area of the horse industry in which the student has a particular interest.

Furthermore, the student will be required to prepare a business plan on an on-going basis. The business plan must be approved by the instructor before the student undertakes the project. The introduction to each section of the project will be handled in class on a short discussion basis.

Student Evaluation:

Progressive evaluation is one basis for student evaluation in this course. Therefore the student will be graded on an on-going basis on the project. The project (the business plan) will be programmed into approximately four phases throughout the term. At the instructors discretion, a schedule of due dates will be issued according to which the phases must be submitted in final form for marking. Also at the instructor's discretion, an oral presentation of the project may be scheduled during the term.

Course Grading:

Major Project (Business Plan)	80 points
Mid-term test (Optional)	10 points
Participation and/or Oral Presentation of Project	<u>10 points</u>
Total	<u>100 points</u>

Supplementary Reading List:

1. Small Business Management Fundamentals
Second Edition
Dan Steinhoff: McGraw-Hill
2. How to Organize and Operate a Small Business
Kelley, Lawyer, Baumback
3. Managing the Independent Business
Preston
4. How to Run a Business
Lasser
5. Managing the Small Business
Steinmetz Kline and Stegall
6. Dominion Bureau of Statistics 1976 Census
7. Anger's Digest of Canadian Law
8. Government Acts - Labour Standards in Canada,
Unemployment Insurance Act, Workmen's Compensation,
Retail Sales Tax Act, Ontario Labour Relations Act,
Employment Standards Act, Customs Act, Bankruptcy Act,
Industrial Design Act, Trade Mark Act, Combines
Investigation Act, Canada Pension Plan, Income Tax Act,
OHSIP, Consumer Protection Act.
9. Small Business - Building a Balanced Economy
Rein Peterson
10. Small Business Administration Bulletins
 - Cash Planning (Manufacturing)
 - Guides for Profit Planning
 - Small Store Planning
 - Management Audit for Small Retailers
 - Starting and Managing a Small Business of Your Own
 - Management Aids for Small Manufacturers
 - #4 Annual
 - #13 Annual
11. The Sources of Invention
Jewkes

12. Small Business Management, Cases and Essays
Grid Series in Management
Steinhoff, Deitzer, Shilliff
13. Introduction to Canadian Business
Second Edition
M. Archer, McGraw-Hill
14. The Law and Business Administration in Canada 3rd Edition
Smyth/Soberman

LAURENTIAN UNIVERSITY

Course Title : Entrepreneurship

Course Number: 4046

Program : B.Com.

Instructor : Kenneth E. Loucks

Introduction:

Entrepreneurship is designed for students contemplating starting or purchasing a company with growth potential. The emphasis is on risk taking in new business ventures rather than on day-to-day management problems of operating a business. The focus is on the discovery and exploitation of business opportunities and successful start up procedures.

Course Materials:

There is no required text for the course but students will be expected to do a great deal of background recommended reading. To this end students may wish to avail themselves of one of the following recommended texts:

1. Donald M. Dible, Up Your Own Organization (The Entrepreneur Press, Santa Clara, California) 1971.
2. Hans Schollhammer, Arthur H. Kuriloff, Entrepreneurship and Small Business Management (John Wiley & Sons, Toronto) 1979.
3. Joseph R. Mancuso, How to Start, Finance and Manage Your Own Small Business (Prentice-Hall, Inc.)

Students will be required to obtain the case package from the bookstore for this course and in addition there will be a charge for course handout material.

Other highly recommended supplementary reading includes:

1. Joseph Mancuso, The Entrepreneur's Handbook (Arteck House, Inc., Dedham, Mass.) 1974.
2. Peter McQuillan and Howard Taylor, Sources of Venture Capital in Canada (Department of Industry, Trade and Commerce, Ottawa) Revised Edition, 1978.
3. Starting a Small Business in Ontario (Ministry of Industry and Tourism, Toronto) 1979.
4. Alexander Ross, The Risk Takers (Maclean Hunter, Toronto) 1975.

5. Campbell, Dickerson, Reid, The Principles and Practices of Business Valuations (De Boo Publications, Toronto) 1975.
6. Robert Mets, Franchising: How to Select a Business of Your Own (Hawthorne Books, New York) 1969.
7. Rein Peterson, Small Business: Building a Balanced Economy (Press Porcépic Ltd., 70 Main Street, Erin, Ontario) 1977.
8. Andrew J. Szonyi and Dan Steinhoff, Small Business Management Fundamentals (McGraw-Hill Ryerson Ltd., Toronto) First Canadian Edition, 1978.
9. Gene Bylinsky, The Innovation Millionaires: How They Succeed (Charles Scribner's Sons, New York) 1976.

Evaluation:

Final grades will be based on participation and contribution to classroom work, term project, and a case study final examination in the following proportions.

Classroom work.....	25%
Final Examination.....	25%
Term Project.....	50%
Total.....	100%

For classroom work students are expected to be prepared to the extent that they are completely familiar with the relevant topic and can critically discuss any assigned reading. Where a case study is assigned students are expected to prepare an analysis complete with recommendations and be prepared to subject their point of view to the critical assessment of their classmates. Regular attendance and preparation is a prerequisite to a passing grade on classroom work.

There are two types of projects in Entrepreneurship - a term paper or a new venture proposal. A term paper involves a literature search and critical assessment of the current state of knowledge on one of the sub-topics of the course. For instance an in depth analysis on the literature on the role and significance of entrepreneurship in the Canadian economy.

For a new venture proposal the student will be asked to develop a business plan for a new business on which he/she intends to embark upon completion of his/her studies. The end result of the project will be a detailed proposal which could be presented to a source of financing for consideration.

The classes of October 29 and 31 will be free time devoted to the project. A typed outline of two or more pages describing your project is due Monday, November 5th. Term papers are expected to be a minimum of 15 typed pages in length and new venture proposals are expected to be a minimum of 20 typed pages plus exhibits.

*FINAL TERM PROJECTS ARE DUE FRIDAY NOVEMBER 30th.

CLASS SCHEDULE

Session

- 1 Course Introduction - discussion of objectives of the course, student motives, etc.

 Req'd Materials: Timmons, Smollen, Dingee, New Venture Creations, pp. 9-17.

- 2 Entrepreneurship in the Economy

 Req'd Readings: Alexander Ross, The Risk Takers, Introduction

 Litvak and Maule, "Climate for Entrepreneurs: A Comparative Study", Report No. 20, Technological Studies Program, Technology Branch, Department of Industry Trade and Commerce, Ottawa, Ontario, January, 1974.

- 3 Characteristics of Entrepreneurship and Entrepreneurs

 Req'd Reading: Schollhammer and Kurloff, Entrepreneurship and Small Business Management, Part I, pp. 1-26.

 Case Study: Vet-Med Ltd., U.W.O. 61002

- 4 Self Assessing Entrepreneurial Characteristics

 Req'd Materials: Timmons, Smollen Dingee, New Venture Creations, Chapter 3.

- 5 Identifying Evaluating and Testing New Venture Ideas

 Req'd Reading: Schollhammer and Kuriloff, Chapter 2

 GUEST SPEAKER: Joe Bischoff, Sudbury Research and Development Group.

- 6 Evaluating Product and Service Concepts

 Req'd Materials: University of Oregon Innovation Evaluation Instrument.

 Case Study: The Ladder Master U.W.O. 61060

- 7 Case Study Moduloc Concrete Products U.W.O. 61066

8 Feasibility Analysis

Req'd Readings: Schollhammer and Kurloff, Chapter 3
Manitoba Institute of Management: New
Venture Feasibility

Case Study: Coffees of the World (A) U.W.O. 61054

9 Case Study: Modern Ova Trends U.W.O. 61041

10 The Business Plan

Req'd Readings: Mancuso, How To Start, Finance and Manage
Your Own Small Business, Chapter 5.

McQuillan and Taylor, Sources of Venture
Capital in Canada, Section 3

Case Study: Coffees of the World (B) U.W.O. 61055

11 The Business Plan - Marketing

Req'd Readings: Hosmer, Cooper and Vesper, The Entrepreneurial
Function, pp. 17-24 & 78-85.

Case Study: Western Roto Thresh (A) & (B)
U.W.O. 61013 and 61014

12 Free Time - Term Project

13 Free Time - Term Project

14 The Business Plan - Production

Case Study: Western Roto Thresh (C) U.W.O. 61015

15 The Business Plan - Financing

Case Study: Western Roto Thresh (D) U.W.O. 61016

15 The Business Plan - Financing

Case Study: Western Roto Thresh (D) U.W.O. 61016

16

The Business Plan - Strategy and Organization

Case Study: Health Care Management Systems
U.W.O. 61056

17

Buying Established Businesses

Req'd Reading: Pierre Bergeron, "Strategy for buying an ongoing business", CA Magazine, May, 1976, p. 35-41.

Req'd Reading: Buying and Selling a Small Business (Small Business Administration, Washington, D.C.) 1969

Case Study: Vivid Packaging (A) U.W.O. 61030

18

Case Study: Chestnut Canoe Company U.W.O. 61053

19

Franchising - Franchisor

Req'd Reading:

Case Study: Coffees of the World (C) U.W.O. 61065

20

Franchising - Franchisee

Req'd Reading: Ministry of Industry and Tourism. Starting a Small Business in Ontario. pp. 6-13

Case Study: Country Style Donuts U.W.O. 61035

21

The Transition: Start-Up and Growth

Case Study: Vivid Packaging (B) U.W.O. 61031

22

Growth Strategy

Case Study: Performance Sailcraft Inc. U.W.O. 61048

23

The Transition - Cashing In

Req'd Reading: Note on Going Public In Canada U.W.O. 61040

Case Study: Cablecasting Ltd. U.W.O. 61006

LAURENTIAN UNIVERSITY

Course Title : Management of Small Enterprises: Operating Problems and Strategies

Course Number: 4037

Program : B.Com.

Instructor : Kenneth E. Loucks

Introduction:

A small business enterprise is defined as one in which one or two independent owners are required to make all of the critical management decisions without the aid of internal specialists and with specific knowledge in only one or two functional areas. Management of the ongoing operations of such enterprises is very different from the management of larger companies that can utilize capital, market size and internal specialists to maximize return on investment.

This course ignores the problems of creation and initiation of a venture and focuses on the problems of managing an on-going small enterprise. A thorough knowledge of management principles and skills are required as well as creativity and innovation in adapting these skills to a small enterprise facing constraints in financial and physical resources as well as minimizing demands on the owner-manager's time.

In spite of the fact that some 90% of Canadian firms are small, students have not traditionally thought of positions in, or ownership of, small businesses as career possibilities. To some extent this course should make people aware of this possibility. The course will also be of use to those people considering careers such as banking, consulting, and accounting where their work will probably involve them in offering advice and assistance to small enterprises.

Course Materials:

The Case Package for COMM 4037 may be purchased at the Bookstore. In addition a package of reading materials will be distributed in class for which there will be a reproduction charge.

There is no required text for the course. A listing of reference texts will be distributed at the beginning of the course. Students are expected to take their own initiative in doing whatever background reading is necessary in order to prepare themselves for intelligent discussion of the course topics and to adequately prepare and defend their analysis of case study issues.

Teaching:

Lectures, case studies, seminars and visiting lecturers will be utilized during the course. Students are expected to attend at least 80% of the scheduled classes fully prepared to discuss the assigned materials in depth.

Evaluation:

Final grades in the course will be based on three components:

- 1. Classwork including quantity and quality of verbal and written contributions to class learning.....25%
- 2. Term Project.....50%
- 3. Final Examination - written case analysis.....100%

Term Projects are of two types - essays and field study reports. An essay is an academic paper which reviews and critiques the seminal literature on one of the subtopics of the course. It is expected that such an essay would be at least 3000 words in length.

A field study report in this course is a case writing assignment. A student is expected to find a cooperating firm on which he can write a description of the business and the operating problems or decisions faced by the owner/manager. The second part of the assignment is the student's analysis of the problems and recommendations to the owner/manager.

Topic Schedule:

SESSION 1

THE SMALL BUSINESS ENVIRONMENT

Req'd Reading:

- 1. Andrew J. Szonyi and Dan Steinhoff, Small Business Management Fundamentals, First Canadian Edition, Chapter 1, "The Small Business Scene".
- 2. Rein Peterson, Small Business: Building a Balanced Economy, Porcépic Press Ltd., Erin Ontario, Chapter 4 "Blood, Sweat, and Tears", Chapter 5 "Growth and Profitability", Chapter 6 "The New Economics".
- 3. John B. Kling, "Personal Strategy Guidelines to Avoid Business Failure", Journal of Small Business Management July 1974, pp. 10-14.

4. Russel M. Knight, "The Determination of Failure in Canadian Small Business" Proceedings 24th Annual Conference International Council for Small Business.

CHARACTERISTICS OF SMALL BUSINESS AND THE SMALL BUSINESS MANAGER

Req'd Reading:

1. James C. Worthy, "Who Fails and Why", Hand and Hollingsworth, Practical Readings in Small Business, W.B. Saunders Company, Toronto, 1979.
2. Kamal E. Said and J. Keith Hughey, "Managerial Problems of the Small Firm", Journal of Small Business Management, January, 1977, pp. 37-42.
3. Kennedy, et al, "Problems of Small Business Firms: An Analysis of the SBI Consulting Program", Journal of SBM ", January, 1979, pp. 7-14.

Case Study: AVP Extrusions, U.W.O. 61044

FINANCIAL ACCOUNTING AND MANAGEMENT INFORMATION FOR SMALL OPERATIONS

Req'd Reading:

1. Royal Bank, Your Business Matters No. 5, Financial Reporting and Analysis.
2. Ernest W. Walker and J. William Petty, Chapter 7, "Accounting Systems and Internal Control", Financial Management of the Small Firm, pp. 104-125.

Case Study: Saguaro Office Supply and Printing Company.
(Broom & Longenecker, Small Business Management,
Fourth Edition).

FINANCIAL CONTROL OF OPERATIONS IN SMALL FIRMS

Req'd Reading:

1. Stegall et al, Managing the Small Business, 1976 revised edition, chapter 14 "Financial Management in the Small Business - Part 1.
2. Royal Bank, Your Business Matters No. 7, Planning and Budgeting.

Case Study: Midwest Ice Cream Co. ICH 9-175-070

ASSESSING OPERATIONS

Req'd Reading:

1. Manitoba Institute of Management, Management Audit for Independent Business.

Case Study: Frog Industries U.W.O. 61047

OPERATIONAL PLANNING

Req'd Reading:

1. Schollhammer & Kuribff, Entrepreneurship and Small Business Management, Chapter 7, Planning.

Case Study: Morrisville Hardware (R) ICH 9-674-058

Case Study: Southern Chevrolet Incorporated.
(Steinhoff, Small Business Management)

SESSION 2

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS

Req'd Reading:

1. Staff Education Division, Business Plan for Small Manufacturers Office of Management Assistance, Small Business Administration.

Case Study: Ontario Reproductions (A) U.W.O. 61024

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS - MARKETING

Req'd Reading:

1. Petrof et al, Small Business Management: Concepts and Techniques for Improving Decisions, Chapter 2, "Marketing Strategy Planning".

Case Study: Ontario Reproductions (B) U.W.O. 61025

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS - PRODUCTION

Req'd Reading:

1. Schollhammer & Kuriloff, Entrepreneurship and Small Business Management, Chapter 12, "Production and Operations Management"

Case Study: Ontario Reproductions (C) U.W.O. 61026

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS - INFORMATION

Req'd Reading:

1. Yvon Gasse, Management Techniques and Practise in Small Manufacturing Firms, Proceedings 24th Annual Conference International Council for Small Business.

Case Study: Ontario Reproductions (D) U.W.O. 61027

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS - FINANCING

Req'd Reading:

1. David F. Scott Jr., "Financial Structure Planning for the Small Firm", Journal of SBM, January 1975, pp. 1-8.
2. McQuillan and Taylor, Sources of Venture Capital in Canada, revised edition, Department of Industry Trade and Commerce.
3. Royal Bank, Your Business Matters No. 1, How to Finance Your Business.

Case Study: Ontario Reproductions (E) U.W.O. 61028

THE NATURE OF SMALL BUSINESS MANAGEMENT PROBLEMS - OWNERSHIP

Req'd Reading:

1. Albert J. Kelly, "Venture Capital", The Entrepreneurs Handbook, Vol. 1, pp. 201-214.
2. Hosmer, et al, The Entrepreneurial Function, Chapter 7, "Organizational Management and Control".

Case Study: Ontario Reproductions (F) U.W.O. 61029

FAMILY BUSINESSES

Req'd Reading:

1. Robert E. Levinson, "How to Make Your Family Business More Profitable", Journal of SBM, October 1974, pp. 35-41.
2. Harry Levison, "Conflicts that Plague the Family Business" The Entrepreneurs Handbook, Volume 2, pp. 123-131.

Case Study: Mid City Wholesale Hardware ICH 9-311-094

FAMILY BUSINESS

Req'd Reading:

1. Robert G. Donnelley, "The Family Business", in Hand & Hollingsworth, Practical Readings in Small Business, pp. 69-81.

Case Study: L.L. Beam Inc. ICH 9-366-013

FAMILY BUSINESS

Req'd Reading:

1. Parks B. Dimsdale Jr., "Management Succession - Facing the Future", Journal of SMB, October 1974, pp. 42-46.

Case Study: L.L. Beam Inc. (B) ICH 9-676-014

PURCHASING A COMPANY

Req'd Reading:

1. Pierre Bergeron, "Strategy for Buying an On-Going Business",
CICA Capital Expenditure Planning for Growth and Profit, pp. 98-110.

Case Study: Schwenker Builders Ltd. U.W.O. 61045

PURCHASING A COMPANY

Req'd Reading:

1. Douglas E. Kellogg, "How to Buy a Small Manufacturing Business" in
Hand & Hollingsworth, Practical Readings in Small Business, pp. 408-417.

Case Study: Challenge Mills Ltd., U.W.O. 61059

FRANCHISING

Req'd Reading:

1. Ministry of Industry and Tourism, Starting a Small Business in Ontario,
pp. 6-13.
2. Edens et al, "Franchisors Describe the Ideal Franchisee, Journal of SBM,
July 1976, pp. 39-47.
3. Cost and Stephenson, "Realistic Financial Planning For The
Franchisee's Pre-Breakeven Operations" in Hand & Hollingsworth,
Practical Readings in Small Business, pp. 184-190.

Case Study: Edgar Speer ICH 9-375-220

SELF MANAGEMENT

Req'd Reading:

1. Royal Bank, Your Business Matters No. Time Management.

Case Study: The Case of the Missing Time, ICH 9408014

MANAGEMENT OF THE ORGANIZATION

Req'd Reading:

1. Schollhammer and Kuriloff, Chapter 8, "Organization"

Case Study: Harwick Smyth & Blanchard ICH 0413-137

GROWTH AND EXPANSION

Req'd Reading:

1. B. La Salle Woelfel, "Financial Audits: A Tool For Better Management" in Hand and Hollingsworth, pp. 301-304.

Case Study: Electricircuit, Inc. ICH 9-209 035

SESSION 3

LONG RANGE PLANNING

Req'd Reading:

1. Herbert H. Woodward, "Management Strategies for Small Companies" in Hand & Hollingsworth.

Case Study: United Industries Ltd. ICH 9-363 025

STRATEGY FORMULATION

Req'd Reading:

1. Frank F. Gilmore, "Formulating Strategy in Smaller Companies" in Hand & Hollingsworth.

Case Study: Vermont Tubbs, Inc. ICH 9-372-191

FINAL EXAMINATION

McGILL UNIVERSITY

Course Title : Managing the Small Business

Course Number: 276-664

Program : MBA

Instructor : W.H. Ellis

This course is designed to acquaint the student with some of the intricacies of starting up and managing a small business. It is offered as an elective to the second year MBA students in the last term of their program.

An integral part of the course is the field project. The importance attached to this project and its significant role is apparent by the allocation of 50% of the course mark towards the students' final grade. The specific object of the project is to provide the students with a first-hand contact with the management of a small business and a practical approach to some of the problems it faces.

Students, either singly or in teams of up to four, select a project from a number provided to them and then arrange a meeting with the president and/or senior individual concerned. At this meeting the president outlines in greater detail the problem he is facing and for which he wishes some assistance in solving. Students are expected to spend approximately 40 hours on the project from the latter part of January until mid-April.

The end result of the undertaking will be a detailed report recommending a course of action to the company.

While the students obviously gain from such contacts, it is hoped and expected that the study would be equally beneficial to the company making it available. Confidentiality of the information provided and used in past studies has always been respected by those working on them.

Studies have been conducted for a wide variety of companies and have included such problems as:

- product diversification
- new retail and plant site selection
- company organization
- accounting and cost control systems
- new business start-ups
- production simplification and scheduling
- market expansion and segmentation
- computer installation and systems analysis
- evaluation of EDP requirements

Managing the Small Business

M.B.A. II - 276-664B

January 16 - April 12, 1979

Tuesdays and Thursdays, 9:00 - 10:30 a.m.

Samuel Bronfman Building, Room 502

<u>Session</u>	<u>Date</u>	<u>Readings and Cases</u>
1	Tue. Jan. 16	Introduction
2	Th. Jan. 18	Project Assignments and Pilcher Products
3	Tue. Jan. 23	Browning Lumber Co.
4	Th. Jan. 25	Blue Sky Travel Ltd.
5	Tue. Jan. 30	Head Ski Co.
6	Th. Feb. 1	Concept of Corporate Strategy
7	Tue. Feb. 6	Performance Sailcraft
8	Th. Feb. 8	Executive Town House
9	Tue. Feb. 13	Apocryphal Industries Ltd.
10	Th. Feb. 15	Bob Lyons (A)
11	Tue. Feb. 20	Project Time
12	Th. Feb. 22	Streeter & Quarles
13	Tue. Feb. 27	Harris Tours
14	Th. Mar. 1	Hubbard Co.
15	Tue. Mar. 6	Blue Mountain Resorts
16	Th. Mar. 8	Flair Inc.
17	Tue. Mar. 13	Francis Hankin Co. Ltd. (A) (B)
18	Th. Mar. 15	Waffle House Inc. (A)
19	Tue. Mar. 20	Robert & Lewis
20	Th. Mar. 22	Vivid Packaging (A)
21	Tue. Mar. 27	Mikes Submarine Sandwiches Ltd. (A) (B)
22	Th. Mar. 29	Project Time
23	Tue. Apr. 3	Vermont Tubbs
24	Th. Apr. 5	Lustre Furniture
25	Tue. Apr. 10	Project Presentations
26	Th. Apr. 12	Project Presentations and wrap-up

<u>Mark Allocation</u>	<u>%</u>
Term Project	50
Final Exam	40
Attendance & Participation	10
	<u>100</u>

MCGILL UNIVERSITY

Course Title : Managing the Small Business
Course Number: N/A
Program : McGill University - Management Institute
Instructor : Willard (Bill) Ellis

This course is for all men and women with an interest in small business management. It is for those who plan to go into business for themselves, as well as for owner-managers who want to increase their knowledge of the modern small business corporation.

The objective will be to show you who you can succeed as an entrepreneur or an independent businessperson.

PROGRAM

The following topics will be covered either by instructor-input, during case study discussions or as assigned readings. Emphasis during the evening session will be on areas that meet your specific needs, and the needs of the other participants.

The Small Business and our Free Enterprise System

- Starting small and growing
- Trends in self-employment
- Various kinds - manufacturing, merchandising, and service businesses
- Advantages of smallness

Factors in Small Business Success

- Why do businesses fail?
- Personal obstacles to effective management
- Disadvantages of smallness
- Determining if an opportunity exists
- The requirements for successful management

Deciding on Self-Employment

- Advantages and disadvantages
- The small business as a part-time venture
- Self-analysis, how to evaluate your chances for success
- Acquiring experience

Buying a Going Concern

- Considering - profits, assets, intangibles, competition
- Reasons for selling
- Setting the price
- Advice to the beginner

Justifying a New Business

- Sources of information
- Introducing a new idea
- Analyzing the market
- Discovering opportunities

Acquiring a Franchise

- What is a franchise
- The growth of franchising
- Types of franchises
- Pros and cons of franchising

Selecting the Location

- The town
- The site
- Retail locations
- Service establishment locations
- Small wholesale's locations
- Small plant locations

Profit Planning and Cost Control

- Break-even analysis
- Financial statements and their interpretation
- Expense control
- Forecasting demand

New Directions in Small Business Management

- Improving the outlook
- Small businesses for older people
- The international small business
- Basic location factors
- Analysis of requirements

Financing and Organizing the Business

- Relating capital to profits
- Capital requirements for - the small merchandiser, the small factory, the small service establishment
- Sources of funds
- Organization - single proprietorship, partnership, corporation
- Tax considerations

Setting Business Policies

- Policies on customers and products, finance and expansion, personnel and organization, pricing, customer services, buying

Management and Leadership

- Basic management functions
- Special considerations - managing your time, keeping records, protection and security

Personnel and Employee Relations

- Recruitment and selection
- Placement
- Training
- Remuneration
- Morale

Pricing for Profit

- The factors to consider
- Examples of pricing strategy
- Different approaches to pricing
- Markups

Advertising and Sales Promotion

- Public relations
- Sales promotion tools, advertising, budget, media, theme

The Role of Credit as a Sales Tool

- Types of credit
- Collections
- When to use credit
- Charge cards
- Credit bureaus

METHOD OF INSTRUCTION

Because the participants are mature men and women, often with several years of business experience, the learning process is designed to capitalize on both the resources of the participants themselves and the input provided by the Course Leader. Thus a great deal of interaction and dialogue will typify most of your hours at the Management Institute.

SCHEDULE

<u>Session</u>	<u>Readings</u>	<u>Assignments</u>
1	Chap. 1-4 incl.	Pilcher Products Co. Ltd.
2	Chap. 18, 23	Blue Ski Travel Ltd. Browning Lumber Company
3	Chap. 12, Management Strategies for Small Companies	Head Ski Co.
4	Chap. 5, 6, 11 How to Buy a Small Manufacturing Business	Hubbard Co.
5	Chap. 16	Apocryphal Industries Ltd.
6	Chap. 17	Vivid Packaging (A)
7	What is Your Capacity to Cope with Stress. Your Innate Asset for Combating Stress.	Streeter & Quarles Bob Lyons (A)
8	Chap. 13	Lustre Furniture Co. Harris Tours Limited

Text: How to Organize and Operate a Small Business Baumbach, Lawyer &
Kelly 5th edition. (Prentice-Hall)

McGILL UNIVERSITY

Course Title: Smaller Business
Course Number: 276-464 (b)
Program : B.Com.
Instructor : Professor W. H. Pugsley

Approximately 26 lecture periods of 1½ hours each.

Text:

"Small Business Management", by Hosmer, Tucker and Cooper, Richard D. Irwin, Inc., Homewood, Ill., 1966.

Course Purpose:

This course, part of the Entrepreneurship, Policy and Small Business Group, has as its purpose to provide the student with a grasp of the nature and requirements of smaller business, the economic basis for its creation and health, its particular problems, its career opportunities. The course should preferably be taken in conjunction with, and after, the Entrepreneurship & Corporate Policy course, because the essential rationales that even the "one-man" business needs to have in mind may not be able to be made adequately visible in the case of small business, or business just getting started, and are much more clearly visible in the case of medium-sized-to-smaller, going concerns such as are dealt with in the E. & C.P. course.

Course Method:

The method is, as with the Entrepreneurship & Corporate Policy course, the analysis and discussion of case histories of a selected number of small enterprises, and their founders, that seem in their way representative, endeavoring to identify in the cases the circumstances and/or policies and aims that have led to success or failure. Class discussion is aimed at developing a generalized approach for the study of such situations, so that the student in subsequent encounters with small business situations will have some guidelines to assist him in reaching sound decisions.

The file on reserve at the Library of current clippings and articles on business and finance, maintained for students of E. & C.P., and may well be of interest to students in this course, even if they have taken E. & C.P., because the file is added to at frequent intervals.

The early part of each lecture period will be given to identifying the important factors in the case history under discussion, and the latter part to developing a suitable course of action or policy for the period ahead. Some cases not in the text will be distributed to the class for later discussion.

Course Contents:

The following is a list of the cases that will be taken up in class:

1. Announcements: class list, seating, identification, preparation for class, etc.
2. Discuss Introduction to the text book and Notes I (p. 489) and a (p. 502). See also "Economic Review", Provincial Bank of Canada, March-April 1974, for statistics relating to Canadian small business scene.
3. Notes 4 (p. 519) and 8 (p. 580).
4. Dillon Fabricating.
5. Tecnifax Corporation. (A).
6. Quality Carbon.
7. Steel Extrusion (A).
8. Liquid Metals (A).
9. Burke Candy.
10. Adcole Corporation.
11. John Buckley.
12. Spray Chemical.
13. J.R. Sanford Corporation (A).
14. Bridgeton Broadcasting.
15. Craftsburg Manufacturing.
16. Linton.
17. Lorin Farr. To Be Distributed.
18. Wayland.
19. Berkeley.
20. Breitman.

The exam will be a case on which a report is requested, with four hours, thinking and writing time available for it. The final mark for the course will be an average of the written report marks (probably two) and the exam mark, with some allowance for performance in class discussion of the cases. Attendance will be recorded and, unless excused, is required at two-thirds of the number of class periods, so that the instructor has adequate opportunity to put questions to the student about his grasp of the course material.

NORTHERN ALBERTA
INSTITUTE OF TECHNOLOGY

Course Title : Small Business Management

Course Number: B-255

Program : Administration Management/Marketing Management

Instructor : G. McLaughlin, R. Crowe

Course Objectives:

To give the student a knowledge base that would make the student aware of:

- (1) the pitfalls advantages of small business;
- (2) the philosophical attitudes, and physical demands made of small businessmen;
- (3) the part that small business has played and will play in the Canadian economy;
- (4) types of small businesses;
- (5) the planning, staffing, organizing and controlling of a small business; and
- (6) the unique aspects of administration, marketing and producing in small business.

Course Descriptions:

Businessmen will concede that there are unique features in the operation of a small business. It is also a fact that small businesses are on the increase.

Many of our students will become involved in small business because of:

- (1) family buisness;
- (2) intend to start their own business. They intend, by personal preference, to become associated with small business.
- (3) they intend to have a part time business; or
- (4) because of their positions in big business, must have an insight into small business. i.e.: bankers, credit personnel, etc.

The students will be asked to submit a project report one week before exam week. This project will take the form of a step by step approach on how to enter a business of their choice.

The course will be 48 hours, 36 hours lecture and 12 hours of lab and guest speakers. Evaluation would be one midterm exam, a series of three cases, two quizzes, and a project concerning the business that is of interest to a student. The project should prove the learning experience for the student and 50 marks has been assigned to motivate them to develop a good project. There will be no final exam.

Part A. Understanding the Psychological Make-Up of a Potential Small Businessman

- 1) His personal philosophy of life.
- 2) His attitudes.
- 3) His physical, mental and knowledge base.

Part B. Small Business and the Canadian Economy

- 1) What criteria is used to define a small business.
- 2) Trends in small business, start ups, failures and in which sectors these new businesses are now entering.
- 3) The contribution made by small business to the Canadian economy.
- 4) A look at the general sectors open to small business:
 - a) retailing
 - b) service industries
 - c) manufacturing
 - d) franchising

Part C. The Advantages and Disadvantages of Becoming a Small Business Owner

1. The Advantages

- a) the concept of "freedom of risk taking" gives the owner of a small business owner the ability to:
 - 1) be flexible in decision making
 - 2) make major decisions quickly
 - 3) be involved in the total matrix of business
 - 4) be community and employee minded
 - 5) quickly change main thrust of the business
 - 6) enjoy profits and return on invested time in proportion to ability and dedication.

2. The Disadvantages

- a) the same "freedom of risk taking" concept makes the owner vulnerable to:
 - 1) lack of expertise in all areas of management, and in depth knowledge of chosen industry and new invocations
 - 2) lack of capital for either working capital or expansion
 - 3) no depth of capital to offset losses on poor decisions

- 4) competition of big business
- 5) personal financial loss when business falls

Part D. Which Type of Business Should you Enter? Once Decided, You Can:

1. Start your own business

a) study economic environment for your business

- 1) the market
- 2) plant facility needs
- 3) capital needs
- 4) labour force needed
- 5) expertise or professional help needed
- 6) Location

2. Buy an established business

3. Acquire a franchise

a) advantages

- 1) national advertising
- 2) management guidance
- 3) known profit maker
- 4) usually small startup capital
- 5) standardized accounting
- 6) some captured market

b) disadvantages

- 1) interference from franchisor
- 2) return comparable to a salary but with investment risk
- 3) competition
- 4) risk usually weighed toward franchisee
- 5) sometimes difficult to resell or regain capital

Part E. Start Up Problems

1) Capital Needs and Your Presentation to the Financiers.

- a) banks
- b) venture capital
- c) government agencies
- d) location considerations
- e) cash flow, financial statements

2) Evaluating the market

- a) sales forecasting
- b) advertising costs
- c) type of selling needed

- 1) personal contact
- 2) mail
- 3) selling agents
- 4) "walk in" traffic

3. Pricing considerations

Part F. Legal, Auditing and Consulting Aspects

- 1) Type of business entity
 - a) advantages and disadvantages in operating as a:
 - 1) sole proprietorship
 - 2) partnership
 - 3) corporation
- 2) Auditors and consultants
 - a) Is auditing needed?
 - b) How sophisticated should the accounting system be?
 - c) Consultants i.e.: market surveys when they should be used.

Part G. Managing Your Business

- 1) Planning
- 2) Organizing Your Business
- 3) Directing and Controlling
- 4) Administration
 - a) accounting, budgeting, forecasting
 - b) use of data processing
 - c) manning your business
 - 1) selecting staff
 - 2) development of staff
 - 3) employee relations, unions
- 5) Purchasing
- 6) Credit Considerations
- 7) Up-Dating of Profit and Growth Goals
- 8) Government and the Small Business
 - a) control
 - b) business and Federal tax

NORTHERN LIGHTS COLLEGE

Course Title : Small Business Management
Course Number: 117
Program : B.Admin. One Year Certificate
Instructor : H. E. Gunn

Nature and Purpose of the Course:

Small Business Management, which is included as an option in our one year program, is designed to enhance the students knowledge about all aspects of planning, operating and maintaining a business.

Objectives of the course are to give the students an opportunity to gain in depth knowledge, through intensive study and application of the following areas:

- legal forms of business, including co-operatives;
- planning and buying a business and risk analysis;
- courses and methods of financing;
- business records and accounting systems;
- balance sheets and financial statements;
- assessing operational efficiency and handling assets;
- purchasing and pricing;
- effective layouts and displays;
- marketing principles and buyer behaviour;
- advertising, promotion and public relations;
- effects of governments; and
- collections and legal action.

Number of Scheduled Classroom Hours:

Lectures	22
Cases and exercises	19
Tests	4
	<hr/>
Tests -	45 hours

Evaluation Method:

a) Two comprehensive tests with final marks totalled and averaged to account for final mark.

or

b) A test after each major subject with all results averaged and totalled to account for final mark.

Learning Resources:

- a) Text - To be selected (Canadian if possible)
- b) Books such as: Small Business Management - Steinhoff
Small Business - R. Peterson
Successful Small Business Management - Meggeson &
Trueblood
- c) Library material
- d) Copies of lecture notes and supporting materials.

Instructional Methods

Lectures, discussions, case studies, problems, research projects, guest speakers, films and other useful techniques.

ST. FRANCIS XAVIER UNIVERSITY

Course Title : Small Business Management
Course Number: Business Administration 456
Program : Bachelor of Business Administration
Instructor : Fred Fisher

Evaluation:

Class assignments total 10% -- testing on class assignments included

Case assignments total 20% -- testing on case material included

Search assignment totals 10% -- testing on search procedure included

February quiz - 10%

Final exam - 50%

Final exam incorporates knowledge of class, case, search assignments plus all readings assigned specifically or handed out and not covered specifically during the actual class time.

**NOTE: In order to complete assignment #3 each student must write to
"Consumer and Corporate Affairs"
Place du Portage
Ottawa/Hull, Canada K1A 0C9

You must request a "CLIENT INFORMATION KIT" on the Canada Business Corporation Act.

Course Information:

Text: Small Business: Building a Balanced Economy. Rein Peterson.

Notes on Financial Forecasting - ICH Series

Notes on Financial Analysis - ICH Series

Copy of Program Requirements 456 for Computer (Charge)*

Copy of Income Tax & Small Business. June 1977.

Copy of Politics of Small Business (Charge)

Copy of "Types of Financing Available". (Charge)

Copy of "FBDB Pamphlets" (14 in the series)

Copy of "Small Business is Good Business".

Copy of "Selecting, Registering and Protecting Corporate Names".

Copy of "Opportunities for Business and Industry in Canada".

Copy of "I.D." Case. (Charge)

Copy of "Post Paper Box" Case. (Charge)

Copy of "Indoor Tennis Case". (Charge)

Copy of "Edgar Shear Case". (Charge)

Copy of "Terms of Purchase & Sale of Small Business". (Charge)

Copy of "Transfer of Ownership; Borrower's Restrictions".

Copy of "Incorporation". (Charge)

Copy of "Sources of Venture Capital in Canada".

*There is a charge for supplementary handouts during term.

Search Assignment:

General Project:

Search for an appropriate small business in the area that you choose. What is required is the nature of the business, a statistical search of market and demographics, an estimate (VALIDATED) of start-up costs and a projected cash flow, along with any other market or financial data.

You shall present your case to the class who will grant you the necessary licence and financing to go ahead. If they refuse to authorize your business, search again.

You may present your case any time prior to March Break. A good guide to use is the hand-out entitled, "Sources of Venture Capital in Canada".

- (1) Short paper on pros and cons of forms of business ownership with tax considerations (pamphlet and text may be helpful) and financial considerations (probable test). Individual submissions.
- (2) Read provisions of all FBDB booklets and highlight all important points for next class. To be discussed. (probable test)
- (3) Read "Incorporation" restrictions and fill out applications included in package for next class. (use name of proposed industry searched)
- (4) Read "Growth and Profitability" by Rein Peterson.
 - discuss advantages and disadvantages of growth
 - discuss profitability and advantage to owner and society
 - discuss growth strategies (probably other sources)
 - probable test
- (5) Sources and types of financing required for Small Business. Restrictions upon Borrower.
FBDB Pamphlet and handout on restrictions and handout on financing Canadian industry. Discussion of sources and types. Probable test.
- (6) Case - Franchising
Buy franchise or not - written solution to be handed in - group effort.
- (7) Case - Indoor Tennis or Hayes.
 - analyze decision processes involved in the start-up of the new business.

- improve upon decision process
- establish which type of court to go with and why - written solutions to be handed in by group.

(8) I.D. Hidden Co. (Purchaser's contribution to be discussed). Proposal for change of ownership. Financial data provided. Discuss data. Buying assets. Written solution - establish purchase price. Do asset valuation and projected cash flow showing taxable position for 5 years. Show required debt to purchase and required payment schedule from projected cash flow.

- Solution to be discussed. Actual asking price to be published.
- Individual submissions required.

(9) Post Paper Box - transfer of ownership - buying assets and assuming liabilities. Financial data provided. Other data available in class through discussion. Company has chaotic market. Required to do projected analysis of cash flow and taxable position for 5 years. Loan requirements have to be established and a payment schedule established based upon projected cash flow - individual submissions required. This is the last case. This is an important case. The purchase price will be published at the end. Any further information required is available from me.

(10) There shall be a 5-10 minute presentation after the March Break by each student on a new development in small business. This could include the story of a particular small business or small business segment, a new marketing or financial consideration.

ST. LAWRENCE COLLEGE

Course Title : Small Business Management

Course Number: BU10

Program : Business Certificate

Instructor : D.B. Stoness

Upon successful completion of this course the student will have an exposure to and understanding of business fundamentals needed to establish, operate and manage a small business.

Specific Objectives:

To establish Business Fundamentals to:

1. Establish a small business by:

- examining the definition and role of small business in today's economy.
- examining the advantages and disadvantages, types and future of small business.
- examining the decision to go into business.
- discussing the pitfalls and rewards of a small business.

2. Manage a small business by:

- examining the role of the small business manager.
- discussing the decision making process.
- examining management controls, accounting aids and financing.
- discussing personnel requirements.

3. Operate s small business by:

- outlining requirements for establishing and maintaining records.
- discussing the business cycle.
- investigating government requirements and assistance.
- investigating assistance from outside sources and trade associations.
- discussing marketing, advertising, purchasing and pricing procedures and policy.

Text To Be Used

Principles of Small Business Management - MacFarlane

Evaluation:

A student may at any time receive from the instructor an evaluation of his/her progress toward meeting the course objectives.

Grading:

A student's final assessment will be measured through a combination of written assignments, review tests and oral participation in class discussions.

The attainment of an A, B, C, D or F in the course is based on the performance in meeting the stated course objectives.

SHERIDAN COLLEGE
OF APPLIED ARTS AND TECHNOLOGY

Course Title : Small Business Management (Part 1)

Course Number: SBM2301

Program : B.Admin.

Instructor :

Calendar Description:

This course has been developed in cooperation with a number of experts in various fields of Small Business Management. This first part covers developmental aspects, self-analysis, locational analysis, financing, personnel, employee relations, legal requirements, sales and marketing and tax requirements.

Text:

HOW TO ORGANIZE AND OPERATE A SMALL BUSINESS by Baumbach, Lawyer, Kelley published by Prentice-Hall.

Evaluation Method:

Projects and tests throughout the term and a final test at the end of term.

Course Objectives:

To help the student operate a small business more efficiently and more profitably.

To fill the void in small business management education by providing for the existing business community an opportunity to learn techniques and theory which will increase profits.

Small Business Management - Schedule:

Topic:

SEMINAR 1 - WELCOME/ORIENTATION

During this period the class will be encouraged to discuss their plans and problems. An outline of the course will be presented. The facilities and personnel will be introduced.

SEMINAR 2 - SMALL BUSINESS - FREE ENTERPRISE

A discussion on the philosophy of entering business. A self-analysis of those in the class who are in business or are considering starting. Lay out the sequence of events involved in starting a business. Factors for success. Self-employment.

SEMINAR 3 - JUSTIFYING A BUSINESS

How to buy or sell a business. The advantages of merging. How to exploit your invention or idea. Source of information.

SEMINAR 4 - THE BUSINESS PLAN

This is fully discussed, including its relevance to small business.

SEMINAR 5 - LOCATION ANALYSIS

Industrial, merchandising and service location selections.

SEMINAR 6 - SOURCES OF FINANCE AND BANKING

The value of this session will depend on a simple approach to sources of funds; short and long term loans; and the impact of carry charges. Case study.

SEMINAR 7 - PERSONNEL

Selection, dismissals, placements, transfers and promotions.

SEMINAR 8 - EMPLOYEE RELATIONS

Regulations, Morale, Case Study.

SEMINAR 9 - LAW

Forms of ownership.

SEMINAR 10 - LAW

Registering name.

SEMINAR 11 - ACCOUNTING FOR NON-ACCOUNTANTS

A discussion on simple bookkeeping from the hat box to the trial balance. A list of necessary forms and documents for business from the one man to the small firm.

SEMINAR 12 - FUNDAMENTAL SALES AND MARKETING

The subject to include all phases of marketing, but in such a way that the simplest approach is taken to surveys, advertising, publicity, personnel. Hiring the salesman; retail sales; wholesaling; competition; pricing, packaging; inventories, etc.

SEMINAR 13 - SETTING UP BUSINESS FOR TAXES

Records required and regulations.

SEMINAR 14 - HOW TO HIRE PROFESSIONAL HELP

How to select, and what to expect from your lawyer, accountant, consultant and banker.

SEMINAR 15 - ANALYZING STUDENT CASE

Review and recommendations.

SIMON FRASER UNIVERSITY

Course Title : Seminar in Small Business Administration

Course Number: 477-3

Program : B.A. (Honours)/MBA

Instructor : Roger Vergin

Texts: Patrick Liles, New Business Ventures and the Entrepreneur, D. Irwin, Inc., 1974.

Rein Peterson, Small Business: Building a Balanced Economy, Erin Ontario, Press Procepic Ltd., 1977.

The course is intended for graduate and fourth year students who are either currently operating or who plan to operate a small business in the future.

Emphasis will be placed primarily on the entrepreneurial activities involved in starting a new business venture and only secondarily on operating problems. Topics include: Determining Economic Needs and Market Opportunities, Legal and Tax Aspects of Business Organizations, Financing New Ventures, Evaluating Existing Businesses and Management of Businesses.

There will be a variety of classroom approaches taken. Several case studies on new ventures will be assigned. There will be occasional guest lectures by entrepreneurs and people in banking and governmental agencies involved with small businesses.

There will be a major student project for the semester of a feasibility study and plan of action for establishing a new business. This will require both library and field research. Both a written and classroom presentation will be required.

SIR SANFORD FLEMING COLLEGE

Course Title : Small Business Management
Course Number : 235006
Program : R. V. M. 1
Instructor : T. C. Jenkins

Course Content:

This two-semester course is designed to provide a background in the principles and practice of small business management with emphasis on Canadian conditions and practices. Case studies and group discussions will be used to supplement formal materials, and encourage students to develop their personal and communication skills. Examples and assignments will be directed towards marina and recreational vehicle issues where practicable.

Topics to be covered include:

1. Small business defined - characteristics, pros and cons.
2. Management defined - resources (4 M's); management functions - plan, organize, direct, control, "many hats".
3. Marketing - sizing up a market opportunity; location; advertising, promotion, public relations; salesmanship.
4. Human Resources Management - human needs (Maslow); motivation (MacGregor, Herzberg); morale.
5. Personnel Management - recruiting, interviewing, training, evaluating; communications.
6. Business Law - forms of business organization; proprietorship, partnership, corporation, contracts, leases.

Evaluation:

1st Semester

3 tests x 25 = 75
Exam = 25

Total 100

2nd Semester

2 tests x 25 = 50
1 Assignment = 20
Video Interview = 10
Exam = 20

Total 100

Texts:

Small Business Management Fundamentals (not mandatory), Szonyi & Steinhoff - 1st Canadian Edition, McGraw-Hill Ryerson Ltd.

Readings from - Small Business Management, Department of Manpower, Saskatchewan

THE UNIVERSITY OF CALGARY

Course Title : The Nature of Entrepreneurship

Course Number: OBDN 781

Program : Master of Management Studies

Instructor : Dr. W. Ed McMullan

A Fundamental Premise of the Course:

"The entrepreneur unlike many small business proprietors is a creative individual who for reasons of background, training and values has chosen to express his creativity through the medium of venture initiation and development".

(This premise requires explanation and justification as its implications for the study of entrepreneurship are enormous).

Course Objectives:

- (1) To develop understanding of entrepreneurs and entrepreneurship.
- (2) To develop an appreciation of the problems facing potential entrepreneurs in Calgary today.
- (3) To encourage creative thinking.

Some Significant Course Questions:

How does one identify entrepreneurial talent? What personal strengths are necessary or desirable for effective entrepreneurship? In what senses are each student's abilities and attitudes adequate to the requirements of entrepreneurship? What formal education beyond an exposure to the functional areas of business and business policy is desirable for a budding entrepreneur? What informal education is desirable? How should one nurture entrepreneurial talent, in large, as well as small businesses? How should one develop a new venture proposal? How should one evaluate a new venture opportunity? What are the stages of development in a new business venture? What particular problems attend each stage? Why do some businesses succeed while others fail? How should one evaluate Canada and Calgary as entrepreneurial environments? How will current or proposed legislation affect the quality of the entrepreneurial environment?

Course Books:

Rollo May - The Courage to Create

David Campbell - Take the Road to Creativity and Get Off Your Dead End

Edward de Bono - The Use of Lateral Thinking

H.B.R. - Managing Creativity

T. Cohn & R.A. Lindberg - Small Business Growth & Survival

Alexander Ross - The Risk Takers

Rein Peterson - Small Business - Building a Balanced Economy

Other Resource Materials:

Harward Business Cases - American Imports, Ar Teeh Packaging and Terry Allen

Films: The Journeyman, Why Man Creates

Some Possible Resource People:

Edgar Davis - inventor, entrepreneur, author, PP Calgary Changer of
Commerce

Bruce Nodwell, OC - Founder of Foremost Industries

Keith Banks - Founder and President of Roke Oil

Jim Gray - V.P. Canadian Hunter, President Canadian Independent
Petroleum Association

Pete Morris - Inventor - Entrepreneur

Norm Bekcer - Inventor - Entrepreneur

Scotty Cameron - Chairman of Small Business Committee, Calgary Chamber
of Commerce

Roy Harris - City - Business Development Officer

Keith Wiggons - FBDB (Calgary)

Ron Southern - President of ATCO

Fred Alder - Entrepreneur

Schedule

Week 1	<u>Introduction</u> Entrepreneurship as a creative activity. Films "Why Man Creates", "The Journeyman".
Week 2	<u>Creativity and Entrepreneurship (1)</u> Identifying entrepreneurial talent Assignment: read May and/or Campbell
Week 3	<u>Creativity and Entrepreneurship (2)</u> Developing entrepreneurial talent Assignment: read de Bono
Week 4	<u>New Venture Creation (1)</u> American Imports Case Assignment: Thoroughly prepare case.

THE UNIVERSITY OF CALGARY

Course Title : Entrepreneurial Problems and Small Business

Course Number: POEN 783

Program : Master of Management Studies

Instructor : E. Sugars

Introduction:

This course is conceived as a seminar in which students individually develop proposals for launching an innovative new business. The seminars will be primarily utilized for constructive mutual criterion of each proposal by students and the professor.

Topical Outline:

Although the topical outline for each proposal may vary from the following format, in general terms these factors will be considered in each case:

Legislation

Product definition and appeals

Customer profile

Promotion

Competition

Pricing

Potential sales

Resources: Physical

Resources: Informational

Resources: Human

Timing

Tentative Pro Formas

Financing

Tax Regulations

Legal Form

Final Pro Formas

Proposal

Presentation of the Proposal

UNIVERSITY OF BRITISH COLUMBIA

Course Title : Seminar In Small Business Policy And Management

Course Number: 589

Program : MBA

Instructor : J. Stephenson

Course Content:

There are a variety of types of independent businesses ranging from corner groceries to high technology growth firms. The focus of this course is on firms in the process of evolving from entrepreneurial aspirations to start-up enterprises and on to medium size viability and perhaps even diversified, multinational prominence. Little consideration will be given to the static, small, owner-operated firm. Emphasis will instead be placed on the initial entrepreneurial process and the problems that arise from rapid growth and evolution through different phases.

Method of Instruction and Evaluation:

The course will involve some lecture material and readings covering such topics as entrepreneurial planning, sources of funding, bureaucratic tasks in start-up (including incorporation and tax considerations), economies of scale, franchising, stages of growth, and purchasing or selling an independent business. Some lower mainland entrepreneurs will be invited into the classroom.

Written assignments will include case analyses and a venture proposal.

Texts:

The Risk Takers by Alexander Ross, (Toronto: Financial Post/Macmillan, 1975).

Small Business: Building a Balanced Economy by Rein Peterson, (Erin Ontario, Porcepic, 1977).

The Entrepreneurial Function: Text and Cases on Smaller Firms, by Hosmer, Cooper & Vesper (Englewood Cliffs, N.J., Prentice-Hall, 1977).

UNIVERSITY OF LETHBRIDGE

Course Title : Small Business Management
Course Number: Management Arts 3840
Program : Bachelor of Management Arts
Instructor : W. Balderson

This course is designed to examine the important aspects of organizing and operating a small business from a management point of view. It will also include a brief examination of the status and contribution of small business to the Canadian economy. Each student is expected to read the assigned readings in the Tate book prior to the related topic lecture. All students are required to read the Peterson book by the end of the semester.

Each student will analyze one case and present his/her findings before the class. Each student will also prepare an analysis of an existing small business or prepare an organizational outline for a new business as a major project.

Details of cases and paper will be presented during the first two weeks of class.

Text:

Small Business: Building A Balanced Economy, R. Peterson.
Successful Small Business Management, Tate, Megginson, Scott,
Trueblood.

Course Format:

Mid Term Exam	20%
Cases	20%
Major Project	30%
Final Exam	30%

Subject:

Introduction - Definition of Small Business
History and Impact of Small Business
The Decision for Self-Employment
Preliminary Evaluation and Forecasts
Purchasing An Existing Business
Organizing a Business

Text Readings

TATE - Ch.'s 1,2,3
TATE - Ch. 4
TATE - Ch. 5
TATE - Ch.'s 6,7,8

Forms of Business Organization
 Location - Layout
 Obtaining Financing and Other Assistance
 Business Planning

Acquire a Franchise	TATE - Ch. 24
Personnel and Time Management	TATE - Ch.'s 9,10,11
Production	TATE - Ch.'s 12,13,14
Marketing	TATE - Ch.'s 15,16,17,18
Accounting and Records Systems	TATE - Ch.'s 19 and 20
Profit Planning and Control	TATE - Ch.'s 21 and 22
Tax Management	
Insurance	TATE - Ch. 23
Providing for Management Succession	TATE - Ch. 25

Major Project - 30%

A. Organizing a New Business:

1. Preliminary Evaluation + Projections of Future Operations.
2. Organizational, Legal + Financial Structure.
3. Location - Layout - Facilities - Equipment.
4. Govt. + Legal Regulations - Taxes, Licenses, Insurance etc.
5. Financing Required, Where to be Obtained, Repayment
6. Proposed Objective, Policies + Procedures regarding the following:
 - a. Personnel
 - b. Marketing - Market analysis + Marketing Practices (ie. 4 P's)
 - c. Records System
 - d. Suppliers, Inventory, Production
 - e. Competition
 - f. Other

B. Analysis of Existing Business - (Buying Business)

Describe and analyze weaknesses or strengths in the following areas:

- a. Structure - Legal, Organizational, Financial
- b. Location - Layout
- c. Personnel - Employee
- d. Purchasing + Inventory Control
- e. Marketing - 4 P's, Competition, etc.
- f. Production
- g. Accounting, Records and their use
- h. Financial Management
- i. Tax Management, if available
- j. Planning + Policies
- k. Other

Course title: Small and Medium Enterprises

Course number: AD-3211

Program: Open to all students

Instructor: Hervé Breau

Description:

The importance of the SME in the Canadian economy. The entrepreneur, starting a small business, its problems and advantages, internal and external resources. Management and marketing in the SME. Legal questions and relations with governments. Production, concessions, and financing.

Objectives:

To make students aware of the special characteristics of the SME and to reveal its strengths and weaknesses, for those who wish to start their own business. To help those who wish to increase their knowledge of SME operations, and those who are concerned about the survival of the SME. To present the primary methods of launching a business. To examine and analyse various administration theories and their application to the SME.

Teaching methods, aids:

Text: How to Organize and Operate a Small Business
Baumbeck, Lauger, and Kelly, 5th edition, 1973
Prentice-Hall

Evaluation

Three tests, exercises, case studies, and a project.

Groups of three students, with a \$15,000 grant from the professor, will found their own business. The project will consist in carrying out all required procedures. such as:

UNIVERSITY OF MONCTON

- a. negotiating purchase of land (after selecting location)
- b. negotiating with financial institutions for financing (after preparing all required documents)
- c. obtaining all necessary permits from the municipality
- d. preparing and setting up the business
- e. market study
- f. making sure that all relevant information is included.

Course title: Seminar in SME Management
Course No: ADM 5120
Program:
Professors: Paul Dell'Aniello and Raymond Normandin

Syllabus

Objectives

The general goal of this course is to help students become familiar with small and medium enterprises (SME), their management, related problems, and government assistance programs.

More precisely, at the end of the course, students should be able to:

1. identify the problems faced by an SME in an actual situation
2. devise practical, effective solutions to these problems
3. identify government programs of technical or financial assistance that can be used by a given SME
4. identify sources and methods of private financing available to SMEs
5. use various business evaluation techniques
6. carry out the study of an SME and present a report to a three-person board, analysing the situation and proposing a concrete draft solution.

Prerequisites

ADM 3300 Marketing
ADM 3500 Financial management

Teaching Method

The course is built around case studies. Lecturers, experts in certain fields specific to the SME, will give talks on their experiences. The practical project, an integral part of the learning process, will require research and study in the library and the business world.

BibliographyRequired reading:

Paul Dell'Aniello and Raymond Normandin, Petites et Moyennes entreprises pour une économie équilibrée. (PME) Le Cercle du Livre de France Ltée, Montréal. French translation and adaptation of Rein Peterson's book.

Collection of texts and case studies: "SME Management Seminar" (T/C)

Texts on reserve at the SME documentation centre.

Les crises administratives dans les PME en croissance. Jean Robidoux and Paul Dell'Aniello.

Rein Peterson, Small Business: Building a Balanced Economy, Press Porcépic Ltd, Erin, Ontario 1977.

Robert E. Buchele, Business Policy in Growing Firms, Chandler Publishing Company, San Francisco, California.

Collection of 17 pamphlets "Minding Your Own Business", published by the Federal Business Development Bank (French version).

Guide Bleu du Financement pour les dirigeants d'entreprise du Québec, July 1974, Quebec Chamber of Commerce.

L'implantation de votre entreprise au Québec, Services des Relations Extérieures; Quebec Department of Industry and Commerce, Communications Branch, August 1973.

Guide des programmes d'aide offerts aux entreprises québécoises. Quebec Department of Industry and Commerce, Communications Branch, 1979.

Georges Leroy, Guy Richard et Jean Paul Sallenave, La conquête des marchés extérieurs, Les Editions d'Organisation, Paris 1978.

Sources of Venture Capital in Canada. (Revised edition 1978). Federal Department of Industry, Trade & Commerce (Information Canada).

Collection of 13 booklets "Your Business Matters", published by the Royal Bank (French version).

Nguyen Dinh Kinh, "La gestion financière et les petites entreprises", Commerce, June, September and October 1976.

Paul Dell'Aniello et Jean Raynault, Le financement de la PME avec application aux entreprises à technologie de pointe. L'Ingénieur.

Evaluation

15%

Analyses

One-page report to be handed in before the discussion of each case study.

30% Two reports on case studies

These reports should be the work of the individual. They should be about five double-spaced typed pages in length. The situation of the business should be discussed, its problems--whether actual or potential--identified, and solutions should be proposed, with a discussion of their more important effects on the business. These effects may be financial, organizational, structural, or strategic (eg, general administrative policy). Students will select their case studies at the first sessions.

15% Class participation

This is evaluated in terms of the frequency and pertinence of the individual's participation in class discussions. Good participation is the result of reading the texts listed on the course outline and preparing the case studies.

40% Practical project

This is done by groups of three to five students. The group selects an SME, makes contact with its directors, and analyses the business. The group will try to find solutions to the problems it has identified.

The group will present two reports on its work:

1. As soon as it has selected a business, the group will submit a one-page report, giving the name and address of the business, its owner, its legal status, how long it has existed, its field, the number of employees, and the approximate sales volume.

2. The group will submit a final report, consisting of:

- a. background and description
- b. analysis
- c. recommendations

This is a written report, but it also will be presented orally to a board of three persons, one of whom is a businessperson. The board will examine the report and question the group on its analysis.

Equivalent marks and letter grades

<u>Total for courses</u>	<u>Official letter grade</u>
85% and over	A
75%-84%	B
65%-74%	C
55%-64%	D
54% and below	E

Course outlineSession

- 1 Introduction to course and organization. Definitions of the SME, its problems. Studying the SME: the case-study approach and the typical crisis approach.

Readings: .PME Chapter 1: (Big, Bigger, Worst)
Chapter 4: (Blood, Sweat and Ingenuity)

- . Problems of the SME in Quebec, by Claude Desjardins
- . T/C The Ups and Down of the Small Business, monthly letter published by the Bank Canadian National.
- . Small Business in Canada. Commercial letter from the Canadian Imperial Bank of Commerce.
- . Centre: "Minding Your Own Business", pamphlet No 3.

2 Crisis in Launching

Case study: Librairie J & J

Readings: . Robidoux, Chapter 1

- . Centre: Sources of Venture Capital in Canada
- . T/C Crisis in developing organization
- . T/C "Les faillites et les causes de faillites des PME." Text by Yves Cornut and Nguyen Phuoc Khanh for the McDonald Stewart Management Chair.
- . T/C Points saillants de la fiscalité en rapport à l'exploitation d'une entreprise.

3 Launching a business

Case study: Leblanc Inc rug distributors

Readings: . PME, Chapter 2 (The Elusive Entrepreneur)

- . Centre: "Minding Your Own Business", pamphlet No 15.

4 Sources of financing

Case study: Le magasin du coin enrg

Readings: . T/C Definitions of types of financing

- . Centre: "Minding Your Own Business", pamphlet No 16.

- . Centre Sources of Venture Capital in Canada.
- . Centre "Your Business Matters", No 1 and No 12
- . Centre Financial management and small businesses
- . Centre SME financing for enterprises using innovative technology

5 Long-term financing

Case study: The family store

- Readings: . Robidoux, Chapter 5
- . Centre Financial management and the SME
 - . Centre "Your Business Matters", No 11

6 Cash Crisis

Case study: Laramée

- Readings: . Robidoux, Chapter 2
- . Commerce: "La gestion financière de la PME" by Yvon G Perreault
 - . Centre "Your Business Matters", No 7
 - . Centre "Minding Your Own Business", pamphlets No 8 and No 9

7 Crisis in leadership and delegation

Case study: L'Ecran

- Readings: . Robidoux, Chapters 3 and 4

8 Crisis in growth

Case study: Benoît--la maison modulaire:
 . Benoît--Ontario

- Readings: . PME Chapter 5 (Growth and Profitability)
 Chapter 6 (The New Economics)
- . T/C Benoît--background
 - . Robidoux: Chapter 6

9 The SME and exportation

Case study: Benoît--exportation

- Readings: . Centre La conquête des marchés extérieurs
. Centre "Your Business Matters", No 4

10 Associations, grouping, and franchising

Case study: Association and grouping of independent oil merchants

- Readings: . PME Chapter 8 (Ways and Means)
. T/C Franchising

11 Evaluating, buying, selling an SME

Case study: Leblanc Inc rug distributors II

- Readings: . T/C Buying or Selling a Business
. Centre "Minding Your Own Business", pamphlet No 10

12 Program of technical and financial assistance to SMEs; taxation for SMEs

- Readings: . Québec Economique, March, April 1978. Articles on government financial and technical assistance to industry in Quebec (to be distributed).
. Centre guide to assistance programs offered to Quebec businesses
. Centre "Your Business Matters", No 9

13 Crisis in continuity

Case study: The family store

- Readings: . T/C Transferring power in the small business

14 Reports on projects and presentations to board

15 Reports on projects and presentations to board

Course title: Businessman Training Program SMÉ

Course No:

Program:

Professor:

Course description

This course is intended for the owner or manager of a small business or anyone who wishes to start a business. The program lasts for four weeks, with a four-hour session two evenings a week.

Topics to be discussed include:

1. the factors that determine the success or failure of a business
2. accounting and financial analysis
3. reading financial statements
4. planning financial requirements
5. short-term financing and the role of banks
6. long-term financing
7. types of businesses
8. legal aspects of business
9. marketing
10. taxation
11. buying or selling a business
12. decision-making

Active participation, special teaching materials, and experienced, practical-minded instructors make this course an enriching experience.

The cost of the course is \$250; this includes all required documentation. This training course is sponsored by the University of Quebec Management Chair.

CLASS SCHEDULESession

- | | |
|---|--|
| 1 | Discussion
Factors that determine success or failure
Management simulation |
| 2 | Legal aspects |
| 3 | Management simulation
Marketing |
| 4 | Accounting and financial analysis |
| 5 | Management simulation
Accounting and financial analysis |
| 6 | Management simulation
Financing |
| 7 | Management simulation
Taxation
Buying or selling a business |
| 8 | Discussion
Human facets in business
Wine and cheese |

All sessions are from 7 to 11 pm.

UNIVERSITY OF REGINA

Course Title : Administration
Course Number: 311
Program : B.Admin.
Instructor : Dr. J. R. Mason

Course Overview:

Our purpose is to explore the entrepreneurial option...the hows and whys of entrepreneurial behavior. We will examine the process from the struggle to take the leap to create the new venture, its birth, startup, development and growth. Our basic premises are that it is both possible and desirable to learn management skills for the creation, planning and operation of new enterprises; and starting one's own business, or gaining employment in small to medium-sized firms are viable alternatives to becoming career managers in large organizations.

Objectives:

The principal aim of the course is to provide you with an intelligent basis for assessing your potential and the appropriateness of these options. It has been designed to accomplish four main objectives with your help:

- (1) To assist you in realistically and candidly assessing your entrepreneurial orientation commitment and potential;
- (2) To enable you to develop an appreciation of the attitudes, managerial skills, and behavioral requirements appropriate for entrepreneurial achievement;
- (3) To assist you in recognizing the relationship between personal planning, making a commitment, and planning for an entrepreneurial, small or large business management career;
- (4) To help you formulate a realistic and sensible plan for accomplishing your personal and entrepreneurial objectives.

The course is particularly relevant for the person who is interested in working in, or starting, a new business. It goes beyond this. For some students, it is intended to stimulate thinking and provide exposure to new ventures as preparation for a career in venture capital, underwriting, or government assistant programs. For others, it serves to illustrate the stark realities of an entrepreneurial career, which they may have previously considered as a promising career alternative. These students may decide that venturing is not for them. A few others may decide that an entrepreneurial career is really the one for them. Hopefully, some course projects will develop into actual businesses and lead these students into highly successful careers--not just in financial terms, but in terms of creative satisfaction.

Text:

Naumes, William, The Entrepreneurial Manager In The Small Business: Text, Readings, and Cases (Reading, Massachusetts: Addison-Wesley Publishing Company, 1978).

The text provides a guide for the student of small business. Naumes emphasizes the management of all aspects of the small firm. Its content is not to be a theory of the small firm nor of entrepreneurship. It does present a practical as well as theoretical orientation. You will be expected to draw upon and integrate the theory and concepts of your administrative courses to date, and to go beyond where and when necessary.

Readings:

You will be expected to explore different sources of information in order to participate effectively in class discussions. Each section of material has a tentative or suggested set of readings but is not to be considered as representative let alone complete. We will exchange information and flesh out the topic outline together.

Canadian Cases:

The text cases have been supplemented with Canadian cases. We have obtained a number of video tapes of presentations by the entrepreneur or venture capitalist involved in the case.

Course Conduct:

The course has been designed to intensify learning and self-assessment through various means including:

- . Case discussions of actual entrepreneurial situations including the kinds of problems, experiences, and decisions, actually faced by entrepreneurs;
- . Individual/team projects and presentations which enable you to gain experience in analyzing, developing and presenting say, a plan of action for a potential new venture of your choice;
- . Self-assessment and experiential exercises designed to assist you in identifying your own entrepreneurial leanings, and to help you gain insight into entrepreneurial processes;
- . Field interviews, site visitations, and class visitations by people involved in the process.

In short, I believe you will find the course to be a demanding but unusual and stimulating experience.

Project:

I would like you to sort yourselves into very small teams to prepare a business plan for a new venture opportunity your team is interested in. Some of you may choose to work alone, after consultation with me. The final report will be submitted to me on the last day of class. It should

be sufficiently detailed and of such calibre that it could be presented to a specific source of venture capital for their favorable consideration. Normally this might be from 15 to 30 pages, doublespaced. Several groups may be asked/volunteer to present their project formally to the class and other interested observers.

I am prepared to negotiate comparable and suitable projects with you. I expect a brief project proposal the third week of the course.

Presentations:

Student presentations of cases, some aspect of new business compatible with course topics such as: the nature of the entrepreneur, sources of new venture ideas, franchising, feasibility studies, will be requested on a voluntary basis. I expect to work with you in developing content and presentation format. We can arrange to have your presentation video-taped and discuss its strengths and weaknesses.

Examination:

It is usually my practice to use a single unannounced case as the basis of the final examination. This exam will be open book and an individual effort. It provides useful feedback to both of us in terms of how well we have developed our skills and insights. It further serves to pull together the course...a worthwhile exercise.

Grades:

The final grade will be a composite of the term's work, project, and final exam. Depending on the individual's circumstances, the final exam may count for 20-40% of the final mark. Class preparation and participation will count for 20-50% of the final mark, and the project will count for 20-40%. These weights must add to 100% for each student and are to be submitted to me along with the project proposal during the third week of the term. I would suggest that you discuss your choice of weighting with your team members.

ADMIN. 311--TOPIC OUTLINE

1. Introduction:

- . What We Are About?
 - Course conduct & scope
 - Your objectives-expectations
 - My objectives-expectations
 - A world about self-assessment
 - Sources of information
- . Perspectives: Small Business in Canada...
 - A working definition?
 - Government presence
 - Small business concerns
 - Directions...

2. New Venture Management

- . The Entrepreneur--You?
 - Self-assessment
 - Personal characteristics & role requirements
 - Are entrepreneurs born, or made?
 - Goal setting and this entrepreneur
 - Management skills
 - Personal ethics and this entrepreneur
 - A broader perspective--this entrepreneurial function

- . Search For A New Venture
 - Idea generation
 - Idea sources
 - Starting from scratch
 - ...Buying an existing business
 - Franchising?
 - Invention, innovation and the entrepreneur
 - Role and nature of personal preferences & criteria

- . Feasibility Studies
 - Quick and dirty first cut
 - Merits of a systematic approach--a protocol?
 - Applications
 - What about yourself?
 - An entrepreneurial team?
 - What level of effort goes into a business plan?

- . Developing This New Venture Plan
 - What is a business plan?
 - Why bother?
 - Investors need for and use of a business plan
 - Specific action steps
 - Is it in your plan?

- . Start-ups: Financing The First Stages
 - What is venture capital?
 - Other sources...
 - Government assistance--something to keep in mind
 - Nontraditional sources of funds
 - How investors investigate, value, and structure a venture investment
 - Helpful tips for attracting venture financing--a summary

3. Managing The On-Going Small Business

- The venture's first year
- Keeping the venture together
- Special operating considerations
- Special management considerations
- Beyond the first year...

UNIVERSITY OF SASKATCHEWAN

Course Title : Venture Management

Course Number: 859B

Program : M.B.A.

Instructor : Colin W. Boyd

"We are not here to sell a parcel of boilers and vats, but the potentiality of growing rich beyond the dreams of avarice."

- Samuel Johnson (Presiding at the sale of Thule's Brewery, London)

Course Description:

Venture management is a general term used to describe that economic activity that deals with the creation of new business endeavours. Included under this definition are such activities as the start-up of new companies or sub-units of larger organizations, product development, acquisitions and product market expansion. Start-up of not-for-profit organizations may also conceivably be included within the definition. The class focuses on the processes and techniques required to convert ideas, inventions and/or innovations into successful enterprises.

"You see things and say 'why?' But I dream things that never were; and I say 'why not?'"

- George Bernard Shaw

Learning Objectives:

The course design is flexible and is dependent on the generalized learning objectives of the course members. The two main alternatives are as follows:

- A. Focus on entrepreneurship and small business from a personal perspective
 1. To assist you in assessing realistically and candidly your entrepreneurial orientation and commitment.
 2. To develop an awareness of the managerial skills and behavioural requirements appropriate for entrepreneurial achievement.
 3. To assist you in assessing realistically your entrepreneurial potential and in focussing on the relationship between personal planning, making a commitment, and planning for an entrepreneurial and business career, and
 4. To help you formulate a realistic and sensible plan for accomplishing your personal and entrepreneurial objectives.
- B. Focus on venture management from a more academic objective perspective

1. To provide an opportunity to examine the processes and techniques of venture management.
2. To provide the opportunity to analyse various types of venture opportunities.
3. To provide exposure to the programs and operations of those external institutions typically involved in the development and commercialization of the firm's projects, and
4. To involve you in a fairly comprehensive feasibility study on some other venture project.

"Companies are like babies - fun to conceive, but hell to deliver."

- Anonymous

Texts:

1. Growth Opportunity Analysis by John A. Weber (Reston Publishing Company, Inc.; Prentic-Hall, Reston, Virginia, 1976.
2. New Venture Creation: A Guide to Small Business Development by Timmons, Smollen, Dingee, (Irwin-Dorsey Limited, Georgetown, Ontario, 1977.)

Mark Distribution (Marks are in parentheses):

1. Term Assignment (select any one)

(a) Prepare a Business Plan	(30 - 60)
(b) Write a Venture Management Case	(30 - 60)
(c) Complete a Personal Strategy Project	(30 - 45)
(d) Prepare a Detailed State-of-Art Study	(30 - 70)
2. State-of-Art Summary Paper (10)
- Not required of students selecting (d) in Part 1.
3. Written Case Analyses (20)
4. Final Examination (20 - 40)

Marks must total 100%

This mark structure can be modified to accommodate individual students' preferred learning objectives and methodologies.

Additional Bibliography:

No specific bibliography will be given for the following reasons:

1. Most other books or readers to be found in the library already contain excellent bibliographies.
2. Other excellent bibliographies can be obtained from Canadian and U.S. library sources, details on request.

- 3. The rapid growth in courses, research and writing about entrepreneurship and venture management has created a substantial obsolescence factor for any bibliography.

In addition to the general business, management and marketing journals, the following provide up-to-date reviews of literature in the field and articles.

Journal of Small Business Management (University of West Virginia)
 American Journal of Small Business (University of Baltimore)
 Financial Journal of Small Business (Georgetown University)

Course Schedule:

Given the small size of the class, and the 'learning-by-doing' nature of the main text, it is impossible to forecast the rate of progress through the course material. The text and exercises from Timmons, Smollen and Dingee will be interwoven with the mini-case studies attached to the course outline. Each case study will provide the focus for a discussion and a related lecture. Progress through Timmons, Smollen and Dingee, to be completed by March 7th, will be as follows:

<u>TOPIC</u>	<u>PREPARATION</u>
Introduction: Goals and Expectations	Chapter 1
Characteristics of the Entrepreneur	Chapter 2
Entrepreneurial Motivation	Chapter 3
Self-Assessing Entrepreneurial Characteristics	Chapters 4 and 5
Goal-Setting and the Entrepreneur	Chapter 6
Management Skills and the Entrepreneur	Chapter 7
The New Venture Idea	Chapter 8
Evaluating the Idea and Preparing the Plan	Chapters 9 and 14
The Entrepreneurial Team	Chapter 10
Building the Team and Raising Financing	Chapters 12 and 15
The Early Stages	Chapters 16, 17 and 18

Progress through the series of mini-cases will be as follows:

<u>TOPIC</u>	<u>INCIDENT #</u>	<u>TITLE</u>
Small Business and the Economy	1	I'm Not All Right, Jack
The Entrepreneur	2	The Future Winner
Setting Goals	3	The Plan Emerges
Implementing Goals	4	Writing it Down
Reaching Goals	5	Getting Organized
Two Paths to Entrepreneurship	6	What's it Worth?

<u>TOPIC</u>	<u>INCIDENT #</u>	<u>TITLE</u>
Choosing a Location and Form of Organization	7	You Can't Get There from Here- Or Can You?
Getting Capital and Credit	8	Money Problems
How about a Franchise?	9	Franchise Potential
Marketing Practices	10	Marketing Problems
Financial Management	11	Financial Problems Revisited
Managing the Human Resource	12	Finding the Right Man
The Production Process	13	Getting the Work Organized
Where to Go For Advice and Assistance	14	The Manager.

The last quarter of the course will deal with the techniques and processes behind the development of new ventures from within existing enterprises, utilizing the text by Weber with additional case studies.

Course title: Creation and administration of an SME
Course No: ADM-4843
Program: BBA
Professor: Jean Robidoux

Objectives

This course aims to make students more aware of the special characteristics of the SME in Canada: its size, field of action, growth potential, and special problems.

In the first part of the course, students will become familiar with the leading role of the SME in Quebec and the rest of Canada. Later they will be asked to devise a plan of action for the creation of an SME in the area of their choice. Alternatively, they may write a report giving specific recommendations to improve the overall administrative process of an existing SME, after analysing its actual situation.

Several classes will be given by resource persons who work either in an SME or in close collaboration with SME managers in Quebec. The purpose is to give concrete reality to the notions discussed in class.

Course outline

Session 1: Defining the objectives of the course. Definition of the SME, and various criteria. Examination of the industrial structure in Quebec and elsewhere in Canada. The importance of the SME in the main spheres of economic activity. SME trends.

Required reading:

Desjardins, Claude. "La PME dans la structure économique du Québec" Commerce, April 1977.

Sheitoyan, T G and Michel Coté. "La PME synergétique", Commerce, May 1976.

Session 2: The entrepreneurial spirit and its components. Profile of the successful entrepreneur in Quebec. Can entrepreneurs be developed?

Required reading:

Robidoux, Jean. Profil sélectif d'entrepreneurs exploitant des entreprises à succès au Québec, 1975.

Bédard, Roger J. "Comment développer les PME au Québec?" Les Affaires, February 1977.

Session 3: Starting an SME, and essential steps for survival: overall plan. Conceptualization and maturation of an idea. The importance of the economic framework to the successful growth of an SME.

Project proposals due.

Required reading:

Business Venture; Proposal outline

Gorre, Philippe. "Cent Questions pour entreprendre". Guide du Créateur d'entreprise. 1975.

Tremblay, Rodrigue. "Les gouvernements face à l'avenir des PME", Commerce, December 1977.

Session 4: The element of risk and recognizing business opportunities. Source of innovative ideas. Rapid-growth sectors. Evaluation and selection of new business activities.

Required reading:

"The Ups and Downs of the Small Business",
Bank Canadian National, February 1976.

Session 5: Entrepreneurial spirit and instruction in administrative sciences. University graduates and their place in the SME. Summary of several experiences in Quebec.
UNIPME project.

Required reading:

Laurin, P. "Un mariage impossible?", Commerce, February 1974.

Session 6: Human resources in the SME. Performance evaluations and internal control mechanisms. The importance of a balanced administrative team.

Required reading:

Perreault, Y G, and Paul Dell'Aniello. "Programme de formation de l'homme d'affaires". Commerce, December 1977.

Theillier, M A. "Aider la PME", Réseau, September 1977.

Session 7: Marketing in the SME. List of new and existing products-- studies underway. Product selection and distribution channels. Assistance for the SME looking for markets. Exporting and the SME. Patents and dissemination of new technology.

Required reading:

Bédard, Roger J. "Le Marketing dans la PME", Les Affaires, March 1977.

Bédard, Roger J. "L'etude du marché dans la PME", Les Affaires, March 1977.

Session 8: Financing in the SME. Various sources of financing. Profitability and cross-sector comparisons. Establishing performance and efficiency measurements. SODEQs.

Required reading:

Kinh, N D. "La gestion financière et les PME". Commerce, May 1976.

Session 9 to 12: These classes will be devoted to visits to industries and to on-site examinations of SMEs in dynamic sectors of the Quebec economy.

Session 13 to 14: Summary; presentation of term projects.

Evaluation:

Readings, class participation, and presentation40%
Term report on launching a business or reorienting an existing business60%
	<u>100%</u>

Required text:

Archer M, and J White. "Starting and Managing your Own Small Business", Financial Post, 1978.

Recommended text

Peterson, Rein. Small Business: Building a Balanced Economy
(French version).

Course title: The entrepreneur and the creation of a business

Course No: 6023

Program: MBA

Professor: Jean Robidoux

Required text:

Mancuso, Joseph R. How to Start, Finance, and Manage Your Own Business, Prentice Hall Inc, 1978.

Recommended text:

Ross, Alexander, The Risk Takers, Maclean Hunter, 1975.

Marking system:

Attendance, readings, and class participation	25%
Term project: project proposal, interim report, and defence of final report before an evaluation committee	75%

Course objectives

The objectives of this course are to enhance the student's ability to recognize business opportunities and to promote entrepreneurial spirit through the conceptualization and actualization of an idea with commercial potential. In the course of the term, students will conceptualize, develop, and finalize a large-scale project in a field of their choosing (the project must be possible in the short term). The final version of the project will be submitted to an evaluation committee, which will determine the degree of personal involvement of the participants and the viability of the project as a whole.

Throughout the term, students will have contact in class with resource persons in the sectors of innovation, finance, marketing, taxation, and commercial law. The main function of these resource persons will be to give advice likely to alleviate the most common difficulties encountered when starting a business. Resource persons will be selected on the basis of their own personal achievements, and will include several Sherbrooke MBA graduates who started their own businesses after graduation.

Session 1: Composite picture of the entrepreneur

Determination of the premises and the objectives of the course.
 Examination of the dominant characteristics of the entrepreneur,
 following several recent studies. Can an entrepreneur be developed?
 Analysis of the profile of the successful entrepreneur in Quebec:
 discussion of typical examples.

Required reading:

Mancuso, Chapter 1: Who is the Entrepreneur?

Liles, Patrick R. "Who are the Entrepreneurs?" MSU Business Topics,
 Winter 1974.

Shapero, Albert, "The Displaced, Uncomfortable Entrepreneur," Psychology Today, November 1975.

Supplementary reading:

Robidoux, Jean and A G Cloutier, Profil sélectif d'entrepreneurs exploitant des entreprises à succès au Québec, May 1973, 184 pages.

Session 2: Entrepreneurial spirit and instruction in administrative science

Changes in the goals of management schools: assessment of current trends and comments on entrepreneurship courses given recently in Canada and the US. Basic distinction between the entrepreneur and the manager in terms of abilities and attitudes. Summary of survey on entrepreneurial spirit among students enrolled in MBA programs in Quebec: aspirations vs achievements. Recent data on career profiles of Sherbrooke MBA graduates.

Required reading:

Mancuso, Chapter 2: The Entrepreneur's Quiz.

Bisson, André. "L'enseignement des Sciences de l'Administration au Québec", MBA Québec, May 1976.

Kierulf, H E. "Can Entrepreneurs be Developed?" MSU Business Topics, January 1975.

"How Harvard Produces Entrepreneurs", The MBA, Vol 4, No 3,
December 1969.

"MBA. The New Elite?" Forbes, March 1977.

Supplementary reading:

Robidoux, J, G Beaudoin, and M Turgeon, Etude portant sur les stages réalisés par les étudiants MBA de Sherbrooke entre 1971 and 1976 et l'impact possible de ces stages sur le choix de carrière de ces étudiants, Minister of State for Small Business, Ottawa, April 1977.

Allaire, Yvan, and Jean-Marie Toulouse, Profil de carrière des diplômés MBA francophones résidant au Québec, University of Montreal Graduate School of Business Administration, 1973.

Session 3: Starting a business

Term project proposals due. Conceptualization and initial maturation process of an idea. The importance of the economic setting for developing entrepreneurial spirit. Analysis and assessment of criteria that can influence how successful a project is. Consideration of the distribution of skills at the beginning phase. Need to prepare a coherent overall plan to start off on the best foot.

Required reading:

Mancuso, Chapter 3: Building an Entrepreneurial Team

Kierulf, Herbert. "Business Venture Development and Evaluation", Journal of Small Business, 1974.

Cent Questions pour entreprendre: Guide du Créateur d'Entreprise, Chotard and Associates, 1975.

Session 4: The element of risk and recognizing opportunities

Identifying new openings for enterprise. The main source of innovative ideas. Rapid-growth sectors. Pitfalls to avoid when selecting new activities.

Required reading:

Mancuso, Chapter 5: The Business Plan.

"We're Losing the Ability to Take Risks", The Financial Post, April 9, 1977.

"Where the Jobs Will Open Up", U S World Report, January 1977.

"Five Young Ways to \$1,000,000", Money, April 1976.

Supplementary reading:

Ross, Alexander. The Risk Takers, Maclean Hunter 1975.

Laurent, L L. Comment ils réussissent, Entreprise Moderne d'Edition, Paris 1971.

Garnier, Gérard and Jean Robidoux. Facteurs de Succès et Faiblesses des Petites et Moyennes Entreprises au Québec, Department of Industry, Trade and Commerce, Ottawa, 1973, 112 pages.

Success and Failure Factors in Small Business, Small Business Administration, Washington.

Session 5: Innovation and its influence on economic dynamics at the national and regional level

Creativity and innovation: misunderstood in Canada? The role of inventors, and patent-issuing in Canada. Various sources of innovation and the potential for creation of a business. Reception structures and their influence on industrial innovation.

Required reading:

"We Lack Innovative Industry But Don't Really Know Why", Financial Post, March 1977.

Shapero, Albert. "L'esprit d'entreprise, un moteur pour l'innovation", Management France, June 1973.

"Americans Still Invent Their Way to Wealth", Forbes, August 1974.

Supplementary reading:

Robidoux, Jean. Etude analytique des traits significatifs observés chez un groupe particulier d'inventeurs au Québec, Department of Industry, Trade and Commerce, Ottawa, 1974.

Robic, Raymond A. Conseils aux Inventeurs, Editions de l'Homme, 1974.

Brevets, Questions et Réponses, Quebec Department of Financial Institutions, Companies, and Co-operatives, 1973.

Session 6: Government programs intended to stimulate industrial development among SMEs

Financial stimulants for creative businesses. List of provincial and federal government programs. Competition among various assistance programs. Writing an application for assistance. The new role of the Federal Business Development Bank. Comments on a new program to promote creation of businesses in New Brunswick.

Suggested reading:

Robidoux, Jean and Louis Maréchal. Etude portant sur les possibilités d'application du programme NED au contexte économique québécois. Council on Rural Development of Canada, May 1978.

Session 7: Financing a new business

Risk capital: definition and characteristics. Various sources of risk capital in Quebec and Canada. The role of the SODEQs as a source of financing for SMEs in Quebec. Multiple financial strategies and incentives. Ways of simplifying the critical problem of initial financing of a new idea or business.

Required reading:

Mancuso, Chapter 4: The Venture Capitalists.

"Money Isn't Fussy", Financial Post, February 1976.

Suggested reading:

Venture Capital in Canada, SB Company, 1977 (French version).

Sources of Venture Capital in Canada, 2nd edition, Department of Industry, Trade and Commerce, Ottawa, 1977.

Grasley, R H. The Availability of Risk Capital for Technological Innovation in Canada, Minister of State for Science and Technology, Ottawa, 1975.

Session 8: Marketing and its influence on the success of a new idea

Various approaches to marketing a new product or service. Identifying the potential and the success rate of new products in Canada; causes of failure. Marketing strategies and product differentiation. Examples of new products and services recently offered in various sectors.

Required reading:

Mancuso, Chapter 9: Preparing for Failure.

George Minden, En route, April 1977.

Session 9: The phenomenon of concentration in Canadian enterprise.

Diverse effects on executives. Trend toward consolidation in some important sectors in Quebec and throughout Canada. Business groupings in Quebec: is this a desirable trend? The importance of associations working for SMEs.

Required reading:

Newman, Peter C. "The Hundred Million Dollar Club", Maclean's, October 1975.

Suggested reading:

Peterson, Rein. Small Business: Building a Balanced Economy, Press Porcépic, 1977.

Newman, Peter. The Canadian Establishment, Vol 1, 1975, McClelland and Stewart.

Clement, Wallace. The Canadian Corporate Elite, McClelland and Stewart, 1975.

Session 10: Legal matters and taxation in launching a business

Comments on questions relating to legal matters and taxation involved in launching a new business. Tax credits, deferred taxation, etc. Successional advantages granted to SMEs in 1978.

Suggested reading:

Which Way Ahead? Canada After Wage and Price Control, The Fraser Institute.

Session 11: Entrepreneurial spirit in national and multinational companies

Entrepreneurship as practised in medium and large enterprises: pilot projects. Results and evaluation methods. Administrative decentralization and its influence on entrepreneurial spirit in large companies.

Required reading:

Kyle, Ian. Innovating at Innotron.

"Canaplan Sells Canadian Tourism", Montreal Star, May 1976.

Session 12: Summary and conclusions.

Session 13: Presentation of term projects before an evaluation committee.

UNIVERSITY OF WATERLOO

Course Title : The Chemical Engineer as an Entrepreneur

Course Number: Ch E 501

Program : Bachelor of Applied Science, Master of Applied Science

Instructor : D.S. Scott

<u>Weeks</u>	<u>(A) One hour lecture</u>	<u>(B) Two hour seminar</u>
1.	The Canadian Economy	Manufacturing in Canada
2.	Entrepreneurs and Innovators The Innovative Chain	Innovation Incubators Risk Management in Innovation Barriers to Innovation
3.	Sources of Information Assignment #1	Patents, Trademarks and Copyrights
4.	Forms of Business Organization When and How to Incorporate	Innovation Case Histories
5.	Venture Capital in Canada	Small Business Problems, The Business Plan, Raising Capital
6.	Basics of Cost Accounting Systems	Records, Controls, Business Analysis
7.	Taxation Assignment #2	Marketing a Product for a Small Business, Inventory Control
8.	Test on Business Organization and Management	Government Assistance to Small Business
9.	Financial Crises, Bankruptcy	Managing Management Time
10.	The Stock Market, Financial Structure	Small Business Case Histories
11.	Test on Required Reading	Open Forum?

NOTE:

A total of, usually, twelve lecturers are involved. Only one is from academic staff, the rest are practising entrepreneurs or professionals.

UNIVERSITY OF WESTERN ONTARIO

Course Title : New Enterprise Management
Course Number : 442/642
Program : Honours Bachelor of Administration and
Masters of Business Administration
Instructor : Russell M. Knight

Objectives of the Course:

The basic premise of this course is that it is both possible and desirable to teach management skills for the planning and operation of new enterprises. This is in line with the school's objective to prepare men and women for administrative careers in business at all levels, including starting their own business.

This course is designed to teach the student how to start or to invest in a new company as well as how to manage an existing small business. The ventures examined in this course happen to be small but have the potential to grow into substantial firms as opposed to remaining a "one man show". Traditional local small businesses such as general retail outlets and service companies such as appliance service firms are not considered in the course. Firms examined are innovative in terms of product, service or concept.

The philosophy of the course is summarized in the course catalog description:

The focus of this course is on the development of new business ventures, as well as on the operation or management of a small business. Cases have been developed to stimulate the student to analyze the opportunities, risks and factors necessary for the success of the entrepreneur and his new enterprise.

Through case discussions and a project on starting and investing in a new enterprise, the student will develop skills in assessing suitable opportunities, evaluating profit potential and raising capital for the new business. The theme of the course is the development of a business plan to start a new business which could be used to raise capital for the business.

Cases used in the course are developed from actual Canadian business situations, both successful and unsuccessful. Students are required to advise the entrepreneur in the case whether to start or invest in the company, how to raise capital, which markets the firms should access, how and when to produce, etc. Frequently the individual in the case will be present in class to answer questions during the latter part of the class, after the students have expressed their recommendations.

UNIVERSITY OF WESTERN ONTARIO

The course is planned to serve several functions. For all students, it is intended to stimulate thinking and provide exposure to ventures as preparation for a career in venture capital, underwriting and government assistance programs. For others, the course serves to illustrate the stark realities of an entrepreneurial career, which they may have previously considered as a promising career alternative. These students may decide that venturing is not for them. A few may decide that an entrepreneurial career is really the one for them. Hopefully, some projects will develop into actual businesses and lead these students into highly successful careers. However, neither the instructor nor the course acts as an advocate of entrepreneurial careers.

Relationship to Area Group Offerings:

This course is not directly related to the courses of any single area group. It is rather an integrative course which draws on the inputs of all courses in the MBA I and Junior years.

General Course Description:

The primary emphasis of the course may be measured on two dimensions. The first sequence covers the following major areas:

1. Exploring for new enterprise opportunities.
2. Developing a management team for the new enterprise.
3. Evaluating the potential success of a venture.
4. Sources of financing for new enterprises.
5. Structuring and negotiating the financing/purchase of a company.
6. Designing a business plan for a new enterprise.
7. Operating the new enterprise.

The second dimension covers the following areas of company, product and market positioning:

1. Marketing - consumer analysis, pricing, distribution and promotion.
2. Production - product design, process design and facilities planning.
3. Finance - sources and uses of funds.
4. Product development - research and development of the product.
5. Personnel - Planning of management and organizational structure of the new enterprise.
6. Distinctive strategy - what makes the new enterprise different and likely to be highly successful.

Each dimension is discussed with reference to the material and the emphasis shifts from case to case.

All classes are taught using the case method and Canadian cases. This method is particularly suited to the needs of the students as many examples of "how to" and "how not to" are stressed. Where possible the entrepreneur or venture capitalist involved in the case is present in class for the discussion. For example, last year, fifteen visitors to the class enhanced the

discussion considerably by bringing the cases to life.

For each class a reading on a related topic is assigned as illustrated in the course outline in Appendix I, which shows the course as planned for 1979.

Recommended Reading Materials:

1. Small Business Management Fundamentals, Szonyi and Steinhoff, Canadian Edition, McGraw-Hill Ryerson
2. Sources of Venture Capital, Peter McQuillan and Howard Taylor, Department of Industry, Trade and Commerce.
3. ABC - Assistance to Business in Canada, Federal Government.
4. Small Business - Building a Balanced Economy, by Rein Peterson, Porcepic Press.
5. The Risk Takers, Alan Ross, the Financial Post/MacMillan.
6. Course Casebook (cases assigned in Appendix I)
7. Starting a Small Business in Ontario, Ministry of Industry and Tourism of Ontario.

Project:

Students will be asked to develop, either singly or in pairs, a business plan for a new business on which they intend to embark upon completion of their studies. The end results of the project will be a detailed proposal which they could present to sources of venture capital for consideration. It should therefore cover such areas as management, market, production and financing for the enterprise. The student is required to obtain the assistance of a faculty member as advisor for the project. His prime responsibility will be to give advice, act as a sounding board and play devil's advocate during the project. The course instructor will also serve this function, but each student should have another faculty member to advise him, if possible.

Evaluation:

The project will compose a significant portion of the grade for the course. There will be either a final examination or a term paper in the course as well, at the student's option. Possible term paper topics include some aspect of new businesses such as franchising, the documentation of the development of a new firm or some special topic of interest to the student. Participation in class will be weighted as well as written assignments during the course. The student has the choice of selecting weights to be allocated to these areas. Student presentations will be requested on a voluntary basis as well.

Weighting Options:

	<u>Max.</u>	<u>Min.</u>
Projects	60%	40%
Exam or Term Paper	30%	20%
Participation & Assignments	30%	20%

These weights must add to 100% for each student and are to be submitted to the instructor. A project proposal of several pages is also to be submitted at that time.

Appendix I

Class 1: Introduction to Course, Discussion of Objectives of Course, Motives of Students, etc., Videotape of a past graduate's thoughts on an entrepreneurial career.

Class 2: Case: Chestnut Canoe

Assignment: This was a recent examination in this course with the following assignment:

Prepare a brief report to Mr. Cawker evaluating his business plan for the takeover of Chestnut. Suggest areas for improvement and additional information you would wish to see provided. Evaluate the plan from the points of view of a banker, a venture capitalist, a representative of the New Brunswick government and yourself, a private investor whom Cawker has asked to join him as an investor and manager in Chestnut. Decide the terms on which you would invest (or not) for each of these roles.

Read: Note of Developing a Business Plan. Chapters 1 & 2 of Szonyi/Steinhoff.

Class 3: Case: The Ladder Master

Assignment:

Mr. McFarlane has asked you to help him prepare a business plan for his new business. Write a brief report to him recommending how he should proceed with emphasis on the market, distribution, product and financing. Tell him what additional information will be required and how he should obtain it. Then evaluate the business (pro and con) from the point of view of a representative of each of the potential sources you have recommended he should approach. This analysis should also answer the question, "Would you invest and on what terms?"

Read: Note on Patents, Copyrights and Trademarks Chapter 5 of Szonyi/Steinhoff

Class 4: Case: Benson Industries

Assignments: Evaluate the case as if it were a proposal to raise capital for the business. What additional information would you want? What is your reaction as a venture capitalist? As an underwriter?

Read: Note on Entrepreneurship
Chapter 20 of Szonyi/Steinhoff

Class 5: Case: The Wind Buggy

Assignment: Recommend to Jack Pearce how he should proceed in terms of marketing, production, financing and management.

Read: Tax Considerations for the New Enterprise
Pages 1- 12 of Sources of Venture Capital in Canada

Class 6: Case: Sentinel Security Bar

Assignment: Prepare an outline of a business plan for Mr. Fisher. How should he manufacture and market the Security Bar?

Read: Note on Incorporating in Ontario
Chapter 11 on Szonyi/Steinhoff

Class 7: Case: White Cellulose Insulation

Assignment: Evaluate the plan prepared by Mr. White. What else should be covered? How should he proceed to obtain financing, etc?

Read: Pages 13 - 27 of Sources of Venture Capital
Chapter 8 of Szonyi/Steinhoff

Class 8: Case: The Mini Camper

Assignment: Would you join Meyerhoffer as a shareholder and management partner? Recommend a marketing, production and financing plan for him.

Read: Chapters 12 and 13 of Szonyi/Steinhoff

Class 9: Case: Health Care Management Systems

Assignment: Prepare an outline of a marketing strategy and business plan which you would recommend for Health Care. What Sources would you approach?

Read: Chapter 14 and 15 of Szonyi/Steinhoff

Class 10: Case: Saunby Mill

Assignment: Prepare a brief evaluation of the proposal as if you were an individual asked to invest on the terms suggested. What additional information would you need? How would you suggest they handle the neighbours? Would you invest?

Read: Note on Venture Capital in Canada
Chapter 16 of Szonyi/Steinhoff

Class 11: Case: Vet Med

Assignment: Which option would you choose if you were Bert? Why? Suppose Bert asked you to invest \$10,000 in his new firm for 50% equity. What would be your decision? Outline a proposal to raise funds for the business.

Read: Remainder of Sources of Venture Capital

Class 12: Case: Solar Heaters

Assignment: Evaluate the proposal. Would you invest? What additional information is needed?

Read: Note on Going Public in Canada

Class 13: Case: Cove Mobile Home Park

Assignment: How should the consultants advise Mr. Hamill to proceed? What are the options?

Read: Pages 1 - 30 of Starting a Small Business in Ontario

Class 14: Case: Country Style Donuts

Assignment: Can Wallace raise the necessary funds with his record? What sources should he approach? Would you invest? Would he be better off as an independent operator?

Read: Note on Franchising

Class 15: Case: Coffees of the World (A)

Assignment: Evaluate the company proposal. Would you become a partner? How significant is the need for management? As Snelgrove, how would you proceed?

Read: Pages 31 - 57 of Starting a Small Business in Ontario

Class 16: Case: Coffees of the World (B)

Assignment: Which option should Snelgrove pursue? Would you, as an investment analyst for the bank, recommend investing in Coffees on the World? Be prepared to defend your decision, pro and con.

Read: Chapter 20 of Szonyi/Steinhoff

Class 17: Case: Coffees of the World (C)

Assignment: Evaluate the franchise from both the points of view of Riley and Snelgrove. What terms would you recommend?

Read: Remainder of Starting a Small Business in Ontario

Class 18: Case: Vivid Packaging (A)

Assignment: Evaluate the proposal prepared to raise financing for Vivid. What sources of capital should they approach? Would you invest?

Read: Chapter 21 of Szonyi/Steinhoff

Class 19: Case: Vivid Packaging (B)

Assignment: How should they decide on a price for the company? How should they negotiate their share of the equity? Prepare a summary of the stockholders and their investments.

Read: Chapter 25 of Szonyi/Steinhoff

Class 20: Case: Performance Sailcraft

Assignment: Discuss the various expansion options for the proposed international expansion. How should they finance this expansion?

Read: Appendix I of Szonyi/Steinhoff

Class 21: Case: Ropecrafts (A)

Assignment: Recommend to Malhotra how he should proceed to raise money for the expansion of Ropecrafts.

Read: Chapter 18 of Szonyi/Steinhoff

Class 22: Case: Ropecrafts (B)

Assignment: What should Malhotra do now about his ceramic supplier situation?

Read: Appendix 2 of Szonyi/Steinhoff

Class 23: Case: Pre-Confederation Furniture

Assignment: Evaluate the market, production requirements and financing needs of Pre-Confederation. Where can they raise funds?

Class 24: Case: Pre-Confederation Furniture - Winnipeg Franchise

Assignment: Evaluate the franchise from Thompson's point of view and as a potential partner with Thompson. On what terms would you invest?

UNIVERSITY OF WINDSOR

Course Title : Small Business Management

Course Number: 493c

Program : B.Com.

Instructor : Robert D. Tamilia

Course Objectives:

1. To help you understand and appreciate the world of the small business enterprise.
2. To help you develop analytical skills in coping and solving small business problems.
3. To enable you to refine your small business analytical skills through scholarly research activities.

Course Structure:

This course is structured differently than what is usually found at this University. Outside speakers, independent projects, case analyses, and library research efforts are the main pedagogical tools used in the course. Each member will be responsible to attend and contribute to each class meeting.

Field Projects:

The objective of the field project is to help a small business in any of the functional areas. Normally, two clients will have to be found, each one in need of your expertise. The problem, solutions, history, data, etc., will have to be documented in a report for each client. The reports need to be typewritten and polished.

In some cases, a client's problem may be so extensive and time consuming as to require 5 to 7 weeks of your time. Such a project then will be counted as two. Other projects can be undertaken, but permission of the instructor is required.

Library Projects:

Each group will be responsible for a library project. The purpose of this project is to develop your analytical skills through scholarly activities. You will need to familiarize yourself with data available from Statistics Canada and/or published information about the small business management process. The following is a sample of the types of projects to be undertaken:

1. A complete bibliography of small business management (to be typed and made available to all class members).
2. An analysis of Federal and Provincial efforts in helping small businesses.
3. Legal implications/requirements of the small business.
4. Special studies dealing with the business problems of selected industries traditionally populated by small businesses.
Examples; dry cleaning outlets, restaurants, bookstores, grocery stores, franchise outlets of various types, specialty stores, etc.
The purpose here is to discuss the various unique characteristics of the industry and the business problems that are of significance to that industry.

Grading Procedure* (Highly Tentative):

	<u>Points</u>	<u>%</u>
Cases	75	<u>19</u>
Field projects	150	37.5
Library project	100	25
Participation, group cohesiveness, etc.	<u>75</u>	<u>19</u>
	400 pts.	100%

310 = A
270-300 = B
230-260 = C
190-220 = D
below 190 = F

*The grading procedure in this course may have to be modified or even completely changed depending on the availability of: projects, speakers, case material, students, professor, etc.

Schedule:

<u>CLASS #</u>	<u>TOPIC</u>
1	Orientation
2	Project assignments
3	Project discussions - case -
4	Speaker
5	Project discussion - case -
6	Speaker
7	Project discussion - case -
8	Individual assignments
9	Project discussion

<u>CLASS #</u>	<u>TOPIC</u>
10	Speaker
11	Project presentations
12	Project presentations

GRADUATE PROGRAMME IN ENTREPRENEURIAL STUDIES

Faculty of Administrative Studies
York University
Toronto, Ontario

The objective of this programme is to combine academic training with extensive exposure to individuals and firms from the small business and entrepreneurial sectors in Canada. This series of recommended courses is designed to equip participants with the knowledge and skills needed to start-up, manage and/or advise small business. The education provided also qualifies the participants for effective employment in those Governmental and larger private sector organizations that interface frequently with smaller firms.

Full time M.B.A. students enroll in POEN 660 Entrepreneurship and Small Business (Prof. Rein Peterson) during the first year of their studies. In their second year students can select four courses from the following:

- POEN 662: New Venture Formation (Prof. R. Grasley)
- POEN 664: Management of the Smaller Enterprise
(Prof. Rein Peterson)
- POEN 666: Advising Small Business (Prof. R. Grasley)
- POEN 604: Mergers, Acquisitions and Divestitures
(Prof. L. Tick)
- ACTG 695: Accounting for Small Business Decisions
(Prof. G. Cunningham)
- BEHS 621: Creativity and Innovation (Prof. G. Farris)
- POEN 601: Master's Thesis (on an Entrepreneurial/
Small Business topic) (Prof. Rein Peterson)

POEN 660 - Entrepreneurship and Small Business

The course explores the roles that entrepreneurship and smaller firms play in a society. Participants are challenged to consider the possibility of eventually going into business for themselves, or of working for a smaller firm. The course is also useful for those who will be dealing with smaller firms in the context of larger organizations (e.g., financial institutions and conglomerates). The nature of small-large firms and government relationships will be emphasized. Cases and lectures will be complemented by presentations of guests from industry and government.

POEN 663 - New Venture Formation

The course emphasis is two fold: (1) identification of personal goals and integrating them with a new venture plan; (2) approaches to solving the problems of new venture start-ups. Assistance available from governments, professionals and other institutions is covered. The course includes seminars with Canadian entrepreneurs. A report involving the preliminary analysis of a business start-up is required together with a detailed draft of a full-fledged investment proposal for the new venture. Credit for the final preparation and execution of a proposal can be gained in a subsequent semester through a (***)690 course. Prerequisites: The seven first year required core courses and POEN 660 which may be taken concurrently or with the permission of the instructor.

POEN 664 - Managing the Smaller Enterprise

The Course explores using cases, readings and lectures the stages of growth which smaller firms pass through: The start-up phase, the cash flow hurdle, the delegation crisis, the idea hurdle, the leadership hurdle, the capitalization crisis, the complacency phase, the expansion-diversification hurdle, the management-succession crisis, the estate planning crisis. Emphasis throughout the course is put on the need for implicit/explicit strategies, policies and tactics for survival.

POEN 666 - Advising Small Business

This course is designed to offer education and training in the art and techniques of management consulting as it applies to smaller firms. The overall purpose of the course is the acquisition of knowledge and skills that will enable students to provide management advice to entrepreneurs and small business persons which will be accepted, understood, and implemented, and which will improve the performance of smaller organizations. The emphasis throughout the course is an experiential approach to teaching, to provide a deeper and participative type of learning of the crucial aspects of the

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management consulting process and of the kind of problems small businesses are facing in their day-to-day operations. Aside from the text, readings, lectures and simulated classroom exercises, students carry out actual consulting assignments.

POEN 604 - Mergers, Acquisitions and Divestitures

This course covers the legal, financial, marketing, behavioural and environmental aspects of business reorganization. The legal mechanics of acquisition as well as the managerial problems associated with acquisitions after their legal completion will be examined. The course uses an interdisciplinary approach, drawing upon guest lecturers to insure a sense of pragmatism.

ACTG 695 - Accounting for Small Business Decisions

This course focuses on the collection of information necessary for the successful management of a small business. It will be of particular interest to students who own their own businesses, who wish to work for small firms or who wish to assist the small businessman with the development of his accounting and control systems. The course will highlight differences in the overall requirements of accounting systems and controls as they relate to small and large firms, including the relevance of generally accepted accounting principles. Specific topics include accounting for small business decisions involving the banker, the government, tax, succession and estate planning, pricing and computer-based systems suitable for smaller retail and manufacturing operations.

BEHS 621 - Management of Creativity and Innovation

An examination of factors which stimulate and inhibit individual and group creativity in organizations and its translation into innovative output by the organization. Emphasis will be placed on the management of research and development, but the role of other parts of the organization will be considered as well. Topics will include individual and group factors in creativity, organizational strategies for innovation, the design of innovative organizations, technology transfer, internal intreprenurship, entrepreneurs and small businessmen, and career development of professionals. Prerequisites: BEHS 500 and 501.

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POEN 601 - Policy Report to the Faculty

Students in groups are required to analyze over approximately a 6 month period an owner-managed entrepreneurial firm and present strategic recommendations.

Gold Medal for Excellence in Entrepreneurial Studies

Each academic year a student or students are awarded a Gold Medal for outstanding performance in the Entrepreneurial Studies Programme.

Ph.D. Programme

Currently two students are planning theses in the entrepreneurial studies area. One thesis will involve "An Empirical Investigation of the Diffusion of Technological Innovation in Small Businesses in Ontario". The other thesis will probably concern itself with the Canadian Automobile industry and its future viability.

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Faculty of Administrative Studies

POEN 660W
Entrepreneurship and Small Business

Fall, 1979
Rein Peterson
Tuesday 7-10 p.m.
CLH Room B

Secretary:

Ms. Pauline Geldart
Room 414
667-3875

Objectives:

The course explores the many roles that small business plays in a society. Participants are challenged to consider the possibility of eventually going into business for themselves, of working for a smaller firm and of becoming more self-reliant. The course is also useful for those who will be dealing with smaller firms in the context of larger organizations. The importance of small - large firm inter-relationships will be emphasized. This course is a pre-requisite for other courses in the Entrepreneurial Studies Programme.

Required Text:

Rein Peterson, Small Business: Building a Balanced Economy,
Press Porcepic, Erin, 1977 (SB).

Assignments and Evaluation:

- (50%) 1. There will be a final examination covering the readings and possibly a case.
- (10%) 2. Three two-page Opinions will be required which evaluate and put in perspective the presentations of guests.
- (10%) 3. One ten-page (maximum) literature critique will be required.
- (10%) 4. One three-page opinion on 3 areas most vulnerable to criticism in the first six chapters of Small Business: Building a Balanced Economy.
- (20%) 5. Two five-page (maximum) case analyses will be required (prescott Cleaners, Abacus Industrial Equipment Company Ltd.)

- 1. September 4 - The Entrepreneurial Event
Who Goes Into Business For Themselves?
And So What?

- Read:
- 1) Chapters 1 & 2 in S/B
 - 2) Anne Bower, "The Sociology of Size", Financial Post 300, Summer 1976

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- 3) Jim Smith, "Small Business Creates Jobs" and "Freedom to Fail", Editorials, Canadian Federation of Independent Business, February 1979
- 4) Lee E. Preston, "The World of Small Business: A Suggested Typology", American Journal of Small Business, April 1977
- 5) J.A. Timmons, "Entrepreneurial Characteristics and Role Requirements", Venture Founders Corporation, 1976
- 6) Patrick Liles, "Who Are the Entrepreneurs?", MSU Business Topics, Winter 1974
- 7) Gordon Peckover, "The New Self-Employed", En Route, December 1978
- 8) "Inventing the Job You Can't Find", Canadian Business, June 1979
- 9) David L. Gordon, "The World Bank and the Development of Small Enterprises", Finance and Development, International Bank for Reconstruction and Development, Washington, D.C., March 1979

Video Tape: "Money Makers", CBC, 1978

2. September 11 - Innovation and Entrepreneurship: A Comparison Between Small and Large Firms.

- Read:
- 1) Dean S. Ammer, "Has Big Business Lost the Entrepreneurial Touch?", Business Horizons, December 1970
 - 2) Edward Roberts and Alan L. Frohman, "Internal Entrepreneurship: Strategy for Growth", The Business Quarterly, Spring 1972
 - 3) Philip I. Weintraub, "Big Business Goes Small", The Business Quarterly, Autumn 1975
 - 4) Paul M. Kavanagh, "Must Mining Exploration Die in Canada?", Speech, Prospectors Convention, March 1973
 - 5) John House, "Facing the Long Odds: An Independent Strikes Out for Gas and Oil", Perspective on Money, Financial Times of Canada, November-December 1976
 - 6) Talaat Abdel-Malek, "Export Marketing Orientation in Small Firms", American Journal of Small Business, July 1978

Guest:

3. September 18 - Entrepreneurs' Night

Two to three Small Businessmen will be asked to participate in a class discussion of their companies and their entrepreneurial styles.

Read: 1) Chapter 4 in S/B.

Class Assignment

Prepare a two-page Opinion of what you have heard today in class, for September 25 (to be handed in). Opinions on the following questions must be presented:

- a) Do the entrepreneurs fit the descriptions given in the literature discussed in lectures 1 and 2? (Characteristics and typology)
- b) What were the innovations that gave the raison-d'etre for these businesses?
- c) How well thought out were the business strategies pursued by the entrepreneurs?

Guests:

4. September 25 - A Technological Perspective on Canada

- Read:
- 1) Chapter 3 in S/B
 - 2) John N. Britton and James M. Gilmour, The Weakest Link: Summary, Science Council of Canada, Background Study No. 43, October, 1978 (the full study is on reserve in the FAS library)
 - 3) Rein Peterson, "Commentary on the Weakest Link", Press Seminar, Ottawa, October 26, 1978

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- 4) "The Conserver Society: The Technological Challenge", MOSST, Ottawa, 1978 (mimeo)
- 5) Rein Peterson, "Conserver Society and the New Economics", MOSST Working Paper, Ottawa, 1978
- 6) Roger Peters, "Strategies for a Consumer-Regulated Economy and Energy System", Conserver Society Notes, Winter, 1979

Film: "Can Canada Compete?", Ontario Research Foundation, 1978

Guest:

5. October 2 - Small and Large Firms Together; Building a
Balanced Economy

- Read:
- 1) Chapters 5 and 6 in S/B
 - 2) Sorrell M. Mathes, The Small Company and Big Business, The Conference Board, Report No. 2, Montreal, 1967
 - 3) M. Neil Browne and Paul F. Haas, "Inter-Industry Effects of Center Firms on Periphery Firms", Small Business Management, October, 1973
 - 4) John V. Petrof and John E. McDavid, "Big Business is the Small Businessman's Best Friend", Marquette Business Review, Spring, 1970
 - 5) Alfred Gross, "Meeting the Competition of Giants", Harvard Business Review, May-June, 1967

6. October 9 - Bankruptcy
The Problems of Small Business

- Read:
- 1) Russell M. Knight, "The Determination of Failure in Canadian Small Business", ICSB Conference, Quebec City, June, 1979

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- 2) John D. Honsberger, "Corporate Failure Can Be Predicted", CA Magazine, June 1979
- 3) Richard Robinson, "Strategic Planning, Potential Data Base and the Development of Small Business Strategies", ICSB Conference, Quebec City, June, 1979
- 4) Massel, Michael Z. "It's Easier to Slay a Dragon Than Kill a Myth", Small Business Management, July, 1978

Hand In: 3-page opinion on first 6 chapters in S/B

Assignment: Due Oct. 16 (see questions suggested)

Guest:

7. October 16 - Small Business and the Chartered Banks

- Read:
- 1) Rein Peterson, "Small Business Breaking Loan Barrier", Financial Post, May 5, 1979, p. 20
 - 2) Rein Peterson, "Low Interest Rates Not Whole Answer To Financing Small Business Development", Financial Post, May 12, 1979, p. 32
 - 3) Thomas Ulrich and Herbert Cassel, "Factors Influencing the Extension of Bank Credit to Small Business", Small Business Management, January, 1975
 - 4) William Stuart, "Interest Rates Don't Matter?", Canadian Banker, date unknown
 - 5) Erie O. Lukas, "Judging Loans to Small Businessmen", Banking, August 1973
 - 6) Louis L. Allen "Four Premises for Small Business Financing" JSBM, April 1971

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Hand In: Opinion Regarding Mr. Campbell's Bankruptcy:
1) Who was at fault?
2) What could have been done to prevent it?

Guest: Jack McIntyre, Manager Independent Business Markets,
Royal Bank of Canada

8. October 23 - Financing Small Business

Read: 1) E.A. Bell, "Equity Investment in Small Business", ICSB
Conference, Quebec City, June 1979
2) A. George Fells, "Venture Capital and the Small Business", The Business Quarterly, Summer, 1974

Hand In: Case Analysis of Prescott Cleaners (A) and Introductory Note
1) Did Mr. Harrison pay too much for the company?
2) What should Mr. Harrison do now?

Guests: 1. Leslie Bowland, Assistant Branch Manager, Royal Bank
2. Greg Hanmer, Credit Officer, FBDB

* October 30 - Reading Week, No Class

9. November 6 - Small Business Survival - The Business Warriors

Read: 1) Brenda Starling, "Merging Small Business to Out maneuver Financial Institutions", Business World Magazine, March 1979

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Assignment: Due Nov. 13 (see questions suggested)

Guests: William Kurchack, President, Business Warriors Inc.
Business Warriors Inc.

10. November 13 - Small Business Strategy

- Read:
- 1) George M. Parks, "How to Climb a Growth Curve: Eleven Hurdles for the Entrepreneur-Manager", Parts I and II, Small Business Management, January and April, 1977
 - 2) A.E.B. Perrigo, "Developing Corporate Strategy for Small Businesses", Journal of Business Policy, Vol.3, No. 4, 1974
 - 3) Dan Schendel, G.R. Patton, and James Riggs, "Corporate Turnaround Strategies: A Study of Profit Decline and Recovery", Journal of General Management, Spring, 1976
 - 4) Bernard Barry, "The Development of Organization Structure in the Family Firm", Journal of General Management, Autumn, 1975

- Hand In:
- 1) Case Analysis of Abacus Industrial Equipment Ltd. N.B. Be sure to include the questions at the end of the cases in your analysis.
 - 2) Two-page typewritten Opinion:
 - a) To what extent (if at all) were the Warriors overstating the case?
 - b) How effective are the warriors?

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11. November 20 - Helping Small Business

- Read:
- 1) R. Joyner, "Small Firm/Large Firm Cooperation A New Initiative In Productivity Improvement For Small Manufacturers", ICSB Conference, Quebec City, June, 1979
 - 2) John Skelton, "Small Firm/Large Firm Cooperation the Community-Based Business Council Example", ICSB Conference, Quebec City, June, 1979
 - 3) Robert M. Colton and Gerald G. Udell, "The National Science Foundation's Innovation Centers - An Experiment in Training Potential Entrepreneurs and Innovators", Small Business Management, April 1976
 - 4) Rein Peterson "University Business Development Centre", October, 1977

Guests:

12. November 27 - Towards A Small Firms Policy In Canada

- Read:
- 1) Rein Peterson, "What Small Business Needs Besides Political Promises", May 19, 1-79, Financial Post
 - 2) Small Business in Canada: Perspectives, Minister of State Small Business, Government of Canada
 - 3) Starting a Small Business in Ontario, Ministry of Industry and Tourism, Government of Ontario
 - 4) The Small Business Policy Minister of State Small Business, Government of Canada
 - 5) Assistance to Business in Canada, Ministry of State for Economic Development
 - 6) Conrad Black, "Conservative Capitalism Finds a Voice", Business Journal, Summer, 1979

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Guest:

13. December 4 - Alternative Careers Night

Several former students will describe their experiences in either starting their own business, working for a smaller firm or working with smaller companies.

- Read:
- 1) Rein Peterson, "Canada: A Nation With An Oversupply of Employees", U.B.C. Business Review, 1978
 - 2) Hosmer, Tucker & Cooper, "Careers In Small Firms", Chapter 13,
 - 3) George W. Rimler and Neil Humphreys, "The New Employee and the Small Firm", Small Business Management, July, 1976
 - 4) John Todd, "From Organization Man to Entrepreneur - A Difficult Transition", Small Business Management, April 1977
 - 5) E.S. Kolodzie, "Self-Employment As A Career", ICSB Conference, Quebec City, June, 1979
 - 6) Robert Coffey and John F. Herrmann, "Is Formal Education Related to Success?", April, 1976
 - 7) Rein Peterson and Douglas Stephenson, "Educating the Entrepreneur and the Small Businessman of the Future", ICSB Conference, Quebec City, June 1979

TV Video Tape: Counterpoint, ATV, Halifax 1977

Hand In: Literature Review and Critique (10 pages)

Guests:

1. Robert Bodig, IIC Mechanical
2. John Hurlburt, John C. Hurlburt Ltd.

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Fall, 1979

BEHS 621V MANAGEMENT OF CREATIVITY AND INNOVATION

Professor George F. Farris

325A A.S.B., X3711

This course examines factors which stimulate and inhibit individual and group creativity in organizations and its translation into innovative output by the organizations. Emphasis is placed on the management of research and development, but the role of other parts of the organization is considered as well. The course is divided into three major sections: individual creativity and entrepreneurship, organizational climates for stimulating invention, and organizational strategies and structures for innovation.

BOOKS - Required:

Watson, James, D. The Double Helix. Signet (New American Library) 1968.

Pelz and Andrews, Scientists in Organizations. Institute for Social Research, University of Michigan, 1976.

Freeman, Chris Economics of Industrial Innovation. Penquin, 1974.

Supplementary:

Allen, T. Managing the Flow of Technology, MIT Press, 1977.

Gerstenfeld, A. Innovation: A Study of Technological Policy, University Press of America, 1977.

Kaufman, H. G., Obsolescence & Professional Career Development, AMACOM, 1974.

Kelley & Kranzberg, Eds., Technological Innovation: A Critical Review of Current Knowledge, San Francisco Press, Inc., 1978.

Taylor, Irving, A. & Getzels, J. W. Perspectives in Creativity, Aldine Publishing, 1975.

Twiss, Brian Managing Technological Innovation, Longman, 1974

Zuckerman, Harriet Scientific Elite: Nobel Laureates in the U.S. The Free Press (MacMillan), 1977.

Supplementary books should be available in limited quantities in both the FAS Library and the bookstore, except for the Kelley & Kranzberg book which is on library reserve only.

Individual copies of numerous articles will also be handed out in class.

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PAPERS

Three written assignments will be required: a book review, a paper on individual creativity, and a paper on project management or organizational innovation.

1. Book review A five-page critical evaluation of one book (or two related books) is due October 5. Possibilities include books listed in the supplementary reading and references listed in the assigned readings. The only restriction is that the book be about the subject matter of the course.

2. Individual Creativity. A ten-twelve-page paper on some aspect of individual creativity in organizations is due November 12. This paper may be co-authored by up to three persons. It may be either an empirical study involving interviews with a number of persons doing potentially creative work or a library research paper which provides an original integration of a body of research on a specialized topic. A one-page outline of the paper should be submitted by October 15.

3. Project Management/Organizational Innovation. A ten-twelve-page paper on some aspect of project management or organizational innovation is due December 3. This paper may be co-authored by up to three persons. It may be either a library research paper which provides an original integration of a body of research on a specialized topic or an empirical study using interviews with persons involved in the management of a project or making decisions about an organization's strategies for innovation. A one-page outline of the paper should be submitted by November 19.

Examples of possible topics for the individual creativity paper include theories of creativity, techniques to enhance creativity, career management for the professional, management practices related to turnover or job satisfaction of potentially creative employees, technical communication, informal organizations among professionals, the dual ladder, etc. An empirical paper would focus on the experience of several individuals with the topic under consideration; a library research paper would review literature on the topic and integrate it to assess the state of the art on the topic.

Examples of possible topics for the project management/organizational innovation paper include project selection techniques, technological forecasting, project management techniques, organization designs to integrate projects with the rest of the organization, comparison of successful and unsuccessful attempts at innovation, ways R & D budgets are actually determined, some aspect of technology transfer, some aspect of science policy, etc. An empirical paper would focus on the experiences of one or more projects or organizations; a library research paper would review literature to assess the state of the art on the topic.

Utterback's (1974) Science article is an excellent example of a library research paper, and Howton's (1963) ASQ article is an excellent example of an empirical study. (Each, of course, attains standards beyond those expected in a 10-12 page term paper!)

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JOURNALS AND BOOKS

Besides the usual management and organizational behavior journals, articles on the management of creativity and innovation frequently appear in the following publications in the York library system.

IEEE Transactions on Engineering Management (1966-78) Steacie Library)
 Research Management (1967-78) (Admin. Studies Library)
 Research Policy (1971-78) (Admin. Studies Library)

The following are not currently available in the FAS Library at York. However, they may be obtained at the University of Toronto's Engineering Library.

Research Management (1960-66)
 IEEE Transactions and Engineering Management (1962-66)
 R & D Management (1971-78)

Books on the subject of the course are often listed under headings of creativity and technological innovations in the Library at York. The above libraries have a number of books on the subject as well as journals.

SCHEDULE

1. Individual Creativity and Entrepreneurship

Sept. 7 1. Introduction: Creativity, Invention, and Innovation in Canada.

Read:

Shepherd, J. "Canadian Industrial Strategy." From The Dean's Colloquium Series 1977-78 "Threats & Opportunities for Can. Enterprise".

Farris, George F. "Motivating R & D Performance in a Stable Organization. In Kaufman, H. (ed.): Career Management: A Guide to Combating Obsolescence, New York: I.E.E.E. Press, 1975, 101-106.

Kerr, S., Von Glinow, M.A., & Schriesheim, J. "Issues in the Study of "Professionals" in Organizations: The Case of Scientists and Engineers". Organizational Behavior & Human Performance, 1977, 18, 329-345.

Mini cases from Gerstenfeld, A.: Innovation: A Study of Technological Policy. Washington, D. C.: University Press of America, 1977, pp. 179-182*, 183-190**, 191-196***.

Case Study 1 - The \$100-Million Object Lesson*

Case Study 2 - International Production Technology, Inc.**

Case Study 3 - Innovation at Texas Instruments***

Sept. 10 2. Explaining Scientific Achievement

Read: Watson, The Double Helix

McClelland, D. C. "On the Psychodynamics of Creative Physical Scientists". In Gruber, H. E. (ed.): Contemporary Approaches to Creative Thinking, New York: Atherton Press, 1963, 141-174.

Rogers, Carl, R. "Toward a Theory of Creativity". In Anderson, H. H. (Ed.): Creativity and Its Cultivation, New York: Harper and Row Publishers, 1959, 69-82.

Newell, A., Shaw, J. C., & Simon, H. A. "The Processes of Creative Thinking". In Gruber, H. E. (ed.): Contemporary Approaches to Creative Thinking, New York: Atherton Press, 1963, 63-119.

Sept. 17 3. Theories of Creativity and Techniques to Enhance It

Read:

Guilford, J. P. "Creativity: A Quarter Century of Progress". in Taylor, I. A. & Getzels, J. W.: Perspectives in Creativity, Chicago: Aldine Publishers, 1975, 37-59.

Maddi, Salvatore, R., "The Strenuousness of the Creative Life". in Taylor, I. A. & Getzels, J. W.: Perspectives in Creativity, Chicago: Aldine Publishers, 1975, 173-190

Getzels, J. W. "Creativity: Prospects and Issues". in Taylor, I. A. & Getzels, J. W.: Perspectives in Creativity, Chicago: Aldine Publishers, 1975, 326-344.

Getzels, J. W. & Jackson, P. W. "The Highly Intelligent and Highly Creative Adolescent: A Summary of Some Research Findings". in Taylor, C. W. & Barron, F. (eds.); Scientific Creativity: Its Recognition and Development, New York: John Wiley & Sons, 1963, 161-172.

Souder, W. E. & Ziegler, R. W. "A Review of Creativity and Problem Solving Techniques". In Research Management, July, 1977.

Lewis, A. C., Sadosky, T. L., & Connolly, T. "The Effectiveness of Group Brainstorming in Engineering Problem Solving". In IEEE Transactions on Engineering Management, Vol. Em-22, No. 3, August 1975, 119-124.

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Sept. 24 4. Applications: Management, Entrepreneurship

Read:

Management:

Pelz & Andrews: 154-173 "Creativity"
337-366 "Creative Process"

Entrepreneurship:

Litvak, I. A. & Maule, C. J. "Profiles of Technical Entrepreneurs". The Business Quarterly, The University of Western Ontario, School of Business Administration, Summer, 1974, 40-49.

O'Keefe, J. "The future holds nothing but good vibes for Vibron". In Canadian Research, Sept.-Oct. 1977, 36-38, 40, 42.

"The Technical Strategy 3M" Innovation, 1969, #5, 1-15.

Roberts, E.B. & Frohman, A.L. "Internal Entrepreneurship: Strategy for Growth". Business Quarterly, 1972, 37, 71-78.

II Organization Climate for Invention

Oct. 5 5. Work Planning

BOOK REVIEW DUE

Read:

Pelz & Andrews: xv-xxviii, "Creative Tensions"
1-7 "Researching the Scientist"
321-336 "Problem Solving vs. Decision Makers"
54-79 "Diversity"
367-382 "Time Pressure"

McCarrey, M.W. & Edwards, S.A. "Organizational Climate Conditions for Effective Research Scientist Role Performance". In Organizational Behavior and Human Performance, 1973, 9, 439-459.

Howton, F.W. "Work Assignment and Interpersonal Relations in a Research Organization: Some Participant Observations". Administrative Science Quarterly, 1963, 7, 502-520.

Class: Mini-Questionnaire,

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Oct. 15 6. Technical Communications

OUTLINE OF TERM PAPER 1 DUE

Read:

Pelz & Andrews: 35-53 "Communication"

Allen, T. J. & Cohen, S. I. "Information Flow in Research and Development Laboratories". Administrative Science Quarterly, 1969, 14, 12-19.

Allen, T. J. & Fusfeld, A. R. "Design for Communication in the Research and Development Lab". Technology Review, 1976, 78:6, 1-7.

Tushman, M. L. "Management Communication Networks in R&D Laboratories". Sloan Management Review, 1979, 20:2, 37-49.

Holland, W. E. "Characteristics of Individuals with High Information Potential in Government Research and Development Organizations". IEEE Transactions on Engineering Management. Vol. EM-19, No. 2, May 1972, 38-44.

De Solla Price, D. J. & Beaver, D. B. "Collaboration in an Invisible College". American Psychologist, 1966, 1011-1018.

Oct. 22 7. Career and Reward Systems

Read:

Pelz & Andrews: 80-89 "Dedication"
90-111 "Motivations"
112-139 "Satisfactions"
174-199 "Age"
200-213 "Age and Climate"

Thompson, P. H. & Dalton, G. W. "Are R&D Organizations Obsolete?" Harvard Business Review, Nov. - Dec. 1976, 105-116.

Jindal, G. R. & Sandberg, C. H. "What It Costs to Hire a Professional." Research Management, July, 1978, 26-28.

Farris, G. F. "A Predictive Study of Turnover". Personnel Psychology, 1971, 24, 311-328.

Shepard, H. A. "The Dual Hierarchy in Research". Administering Research & Development, 19 , 425-432.

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Oct. 22
Cont'd

Research Management Symposium on the Dual Ladder:

Ritti, R. R. "Dual Management - Does it Work?". In Kaufman, H. (ed.): Career Management: A Guide to Combating Obsolescence, New York: I.E.E.E. Press, 1975, 367-374.

Moore, D. C. & Davies, D. S. "The Dual Ladder - Establishing and Operating It". Research Management, July, 1977, 14-19.

Smith, J. J. & Szabo, T. T. "The Dual Ladder - Importance of Flexibility, Job Content & Individual Temperament". Research Management, July, 1977, 20-23.

Meisel, S. L. "The Dual Ladder - The Rungs and Promotion Criteria". Research Management, July, 1977, 24-33.

Cantrall, E. W. "The Dual Ladder - Successes and Failures". Research Management, July, 1977, 30-33.

Nov. 5 8. Leadership, Supervision, Group Dynamics

Read:

Pelz & Andrews: 8-33, 140-153, 240-260, 383-401

Farris, G. F. "The Technical Supervisor: Beyond the Peter Principle". In Kaufman, H. (ed.): Career Management: A Guide to Combating Obsolescence, New York: I.E.E.E. Press, 1975, 107-114.

Farris, G. F. "Organizing Your Organization". Innovation, 1971, #25, 2-11(b).

Conrath, D.W. "The Role of the Informal Organization in Decision Making on Research and Development". I.E.E.E. Transactions on Engineering Management, Vol. EM-15, No. 3, Sept. 1968, 109-119.

Class: Film - The Bob Knowlton Story

III Strategy, Structure, and Organizational Innovation

Nov. 12 9. Success & Failure in Organizational Innovation

TERM PAPER 1 DUE

Read: Freeman, chapters 1-6, especially ch. 5, "Success and Failure in Industrial Innovation"

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Nov. 12
Cont'd Marquis, D. G. "The Anatomy of Successful Innovations". From a monograph published by the National Science Foundation "Successful Industrial Innovations" by Myers & Marquis (available from Superintendent of Documents, GPO, Washington, D.C., \$1.00).

Utterback, J. M., Allen, T. J., Hollomon, J.H., & Sirby, Jr., M.A. "The Process of Innovation in Five Industries in Europe and Japan". I.E.E.E. Transactions on Engineering Management, Vol. EM-23, No. 1, Feb., 1976, 3-9.

Hippel, Eric von, "The Dominant Role of Users in the Scientific Instrument Innovation Process". Research Policy, 5, 1976, 212-239.

Ibuka, M. "How SONY Developed Electronics for the World Market". I.E.E.E. Transactions on Engineering Management, Vol. EM-22, No. 1, Feb., 1975, 15-19.

Nov. 19 10. Technology Strategy

OUTLINE OF TERM PAPER 2 DUE

Read: Freeman, ch. 8 "Innovation and the Strategy of the Firm".

Roberts, E. B., "Technology Strategy for the Medium-Size Company". Research Management, July 1976, 29-32.

Mansfield, E. & Brandenburg, R. "The Allocation, Characteristics, and Outcome of the Firm's Research and Development Portfolio: A Case Study". The Journal of Business, Oct. 1966, 4, 447-464.

Case: The ABC Engineering Company: Innovative Management in Canada, Innovation Canada, 1976.

Cooper, A. C. & Schendel, D. "Strategic Responses to Technological Threats". Business Horizons, Feb., 1976.

Von Hippel, E. A. "Users as Innovators". Technology Review, 1978, 80:3, 3-11.

Roberts, E. B. & Frohman A. L. "Strategies for Improving Research Utilization". Technology Review, 1978, 80:5, 1-9.

"Texas Instruments Shows U.S. Business How To Survive In The 1980s". Business Week, September 18, 1978.

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Nov. 26 11. Project Management and Organization Design

Read: Freeman, ch. 7, "Uncertainty, Project Evaluation and Innovation:

Clarke, T. E. "Decision-making in Technologically Based Organizations: A Literature Survey of Present Practice". I.E.E.E. Transactions on Engineering Management, Vol. EM-21, No. 1, February, 1974., 9-23.

Abernathy, W. J. & Wayne, K. "Limits of the learning curve". Harvard Business Review, 1974, 52:5, 109-119.

Abernathy, W. J. & Utterback J. M. "Patterns of Industrial Innovation". Technology Review, 1978, 80, 40-47.

Pelz & Andrews, ch. 12

Jermakowicz, W. "Organizational structures in the R&D sphere". R&D Management, 1978, 8, Special issue, 107-113.

Marquis, D. "Ways of Organizing Projects". Innovation, 1969, #5, 1-4.

Kolodny, H. F. "Matrix Organization and New Product Innovation". unpublished manuscript, U. of Toronto, 1979.

Frohman, A. L. "Critical Functions for an Innovative R&D Organization". The Business Quarterly, Winter 1974, 72-81.

Farris, G. F. "Informal Organizations in Research and Development". Paper prepared for presentation in session "Behavioral Research on the Management of Innovations: A Critical Review & Managerial Implications." Joint National Meeting of Institute of Management Sciences & Operations Research Society of America, New York, May, 1978.

Case: Higgins Equipment Co. B.

Dec. 3. 12. Technology Transfer and Diffusion; Science Policy

TERM PAPER 2 DUE

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Dec. 3
Cont'd

Read:

Freeman, ch. 9 "Aspects of Public Policy for Innovation".

Utterback, J. M. "Innovation in Industry and the Diffusion of Technology". Science, Vol. 183, Feb. 1974, 620-626.

Chakrabarti, A. K. "Some concepts of technology transfer: adoption of innovations in organizational context." R&D Management, 1973, 3:3, 111-120.

Hollomon, J. H. et al. "Government and the Innovation Process". Technology Review, 1979, 81:6, 30-41.

Kates, J. "Building a Stronger Canadian Industry". Science Council of Canada.

Wiesner, J. B. "Has the U.S. Lost its Initiative in Technological Innovation?". Technology Review, 1976, 78:8, 54-60.

Roberts, E. B. "Generating Effective Corporate Innovation". Technology Review, 1977, 79:10, 3-9.

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YORK UNIVERSITY
Faculty of Administrative Studies
Graduate School of Business

Professor Robert Grasley

Rm. 031 ASB

POEN 662 - Winter
Monday 7 - 10 p.m. Rm. 036 ASB

NEW VENTURE FORMATION

COURSE DESCRIPTION

Purpose

The emphasis in this course is on identification, structuring and financing of new enterprises. The behavioural characteristics of entrepreneurs are discussed but the main focus is on organizing startups, as opposed to the challenges of management in smaller forms.

The course has a pragmatic rather than a theoretical orientation. It is designed to familiarize you with the types of opportunities and problems likely to be encountered in an entrepreneurial career, and to provide you with the working knowledge and technical skills required to pursue this kind of career. The term project is intended to give you "hands on" experience in developing a Business Plan for the start up of a new enterprise. Clear, concise and persuasive communication are emphasized in both classroom discussion and the term project.

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A fundamental thesis of the course is that an entrepreneurial career is a valid and reasonable career alternative. Becoming a successful entrepreneur is not inherently limited to a select few; the necessary skills and knowledge can be learned and developed. Based upon what you find in this course, you may be all the more attracted to an entrepreneurial career; alternatively, you may come to realize that your interests and skills lie elsewhere.

The course is intended for those students who have an immediate or future interest in starting a new venture, buying an existing business, or participating in the early management of a new venture. It should also prove useful for those interested in venture capital, consulting, commercial banking, investment banking, or other activities that provide service to or require interaction with new enterprises.

Approach

The three primary elements of the course are:

1. lectures and discussion, where the emphasis is on evaluating projects, entrepreneurs, risks and other problems related to establishing a new venture.
2. readings in the texts and presentation by outside speakers that are designed to equip you with the necessary knowledge in such areas as evaluating and purchasing a going concern, venture and risk capital, financing sources and methods, and entrepreneurship.

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3. term project, where you are required to develop fully and commit to paper, a new business proposal as a formal business plan.

Prerequisites

Students will need to draw upon their knowledge of the functional areas of business. While this is not a course in marketing, finance, production, decisionssciences or organizational behaviour, some knowledge and skill in each of these areas is virtually mandatory. It is an integrative course, as our concern is the total enterprise. Emphasis is on the steps necessary to create the enterprise rather than on the day-to-day management of the enterprise. Obviously, an entrepreneur has in mind the task to managing the on-going enterprise as he or she evaluates the opportunity, determines staffing and structures the financing.

Outline

The major topics of the course are:

1. Identifying entrepreneurial characteristics in yourself and others.
2. Searching for venture opportunities.
3. Matching an individual or team with a venture situation.
4. Evaluating the potential and long-term viability of a venture.
 - a. Is there a need and an ability and willingness to buy?

- b. What are the resources required for success?
- c. What is the competitive leverage?
- 5. Evaluating sources of financing.
- 6. Structuring the financing or purchase of a company.
- 7. Carrying out negotiations.
- 8. Planning operations -- the deployment of resources.

Case Preparation

The perspective of the course is that of an individual who wants to start or to purchase a business. Study and analysis should be made with an awareness of this individual -- his or her interests, values, objectives, capacity for risk and uncertainty.

You will be required to identify a venture project and decide if you wish to become an entrepreneur. You should have made that decision before coming to class and have in mind why your decision is appropriate and how you will implement it. In general, to the extent you need to make assumptions of additional facts or attitudes where it is not possible to gether sufficient data in the available time, please do so. You are expected to come to conclusions and to make practical, useful decisions.

Term Project

The term project requires you to identify a new business opportunity, evaluate its potential, and develop a finished Business Plan to exploit the opportunity. The subject of the Business Plan

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can be an entirely new venture; a major diversification for an existing company -- essentially a new venture within a company; or a young, existing company needing direction. It is your responsibility to search out the new business opportunity.

Students may work independently or, where the nature and scope of the new business opportunity warrants, in teams of two or even three. I encourage particularly the formation of teams involving both Business and Engineering graduate students on the same project. Joint projects with other courses are not acceptable.

As the course schedule indicates, check-points occur about every two weeks with respect to the project:

1. A one-page synopsis of the proposed new business is due in the second week of the quarter.
2. A one-page progress report, indicating early results of your investigation of the market, is due during the sixth week of the quarter.
3. A second one-page progress report, outlining any major problems encountered and investigative steps yet to be taken, is due eight weeks into the quarter.
4. The Business Plan is due at the end of twelve weeks.

Remember that to be successful the entrepreneur must be generally correct in his or her assessment of the opportunity and of the resources required for success, and he or she also must be persuasive and credible in order to attract those resources to the venture.

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The term project requires a major effort -- at least 80 hours of work; contacts with individuals off the campus, and probably some library research. Don't put it off! Get started early in the quarter and keep at the project.

Text and Readings

Required reading:

1. The text used in the course is Timmons, Smollen and Dingee, - New Venture Creation, Richard D. Irwin, Inc., available at the bookstore - must purchase
2. Kelley, Albert J, - Planning for the New Enterprise - article on business plans - handed out
3. Mancuso, Joseph - How a Business Plan is Read - article on business plans - handed out
4. Grasley, Robert H. - Seekers and Suppliers of Risk Capital - analysis of the Canadian environment for risk capital - handed out
5. McQuillan and Taylor - Sources of Venture Capital in Canada - reference book produced by Department of Industry, Trade and Commerce - handed out.
6. Grasley, Robert H. - Wanted - Entrepreneurs - articles on venture capital in Canada - handed out
7. Starting a Small Business in Ontario - Ministry of Industry and Tourism - handed out

Recommended Reading (on reserve in library)

1. Ross, Alexander - The Risk Takers, Financial Post/Macmillan
2. Peterson, Rein - Small Business: Building a Balanced Economy - Press Porcepic
3. Schumacher, E.F. - Small is Beautiful - Abacus

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4. Shames, William H. - Venture Management - Free Press
5. Bylinsky, Gene - The Innovation Millionaires - Scribners
6. Grasley, Robert H. - The Availability of Risk Capital in Canada for Technological Innovation and Invention - Ministry of State Science and Technology, Report #6

Suggested Additional Reading:

1. Tate, Megginson, Scott and Trueblood - Successful Small Business Management - (Revised Edition) Business Publications Inc.
2. Stegall, Steinmetz and Kline - Managing the Small Business (Revised Edition) - Richard D. Irwin, Inc.
3. Sullivan, Daniel J. - Small Business Management: A Practical Approach - Business Publications, Inc.
4. Liles, Patrick R. - New Business Ventures and the Entrepreneur - Richard D. Irwin, Inc.
5. Levitt, Theodore - Marketing for Business Growth - McGraw Hill
6. Shaffer, Ivan - Business is Business? Thirty days in the life of Richard Rash - Entrepreneur (read for fun) - Lester and Orpen

Conclusions:

The work load in this course is heavy. Classes commence at 3:00 or 7:00 p.m. and all students are expected to attend. The term project is designed to give you flexibility in pursuing your interests, but a good deal of work is required to complete this project satisfactorily. Above all, the course is designed to be pragmatic. Relatively unstructured, the student must develop his or her own resources, just as in a real life situation. Applied, not theoretical, graduates frequently use the business plan developed in this course as the basis for a real-life venture.

YORK UNIVERSITY
Faculty of Administrative Studies
Graduate School of Business

Professor Robert Grasley
POEN 662 Winter
Monday 7-10 p.m. 036 A.S.B.

NEW VENTURE FORMATION
COURSE SCHEDULE

Class Meeting #1 - Friday, January 5*

Lecture: New Venture Creation: An Overview
Read: Chapters 1 & 2 text pp. 3-37
Prepare: Summary of Business Plan project (major term paper) -
use pp. 235-240 as format - hand in by Lecture #3
Complete page 17 ready for Lecture #2

Class Meeting #2 - Monday, January 8

Lecture: Assessing Entrepreneurial Characteristics
Read: Chapters 3 & 4 text - pp. 77-110 (skip pp. 103-107)
Prepare: Pre-planning Exercise - text - pp. 65-71
Grasley - "Wanter - Entrepreneurs" (handout)

Class Meeting #3 - Monday, January 15

Lecture: The New Venture Idea and its Feasibility
Read: Chapters 8 & 9 - text pp. 197-223
Mancuso - "How a Business Plan is Read" (handout)
Prepare: Venture Analysis - text - pp. 241-272
HAND IN: New Venture Summary Proposal - text - pp. 235-240

Class Meeting #4 - Monday, January 22

Lecture: A Canadian Venture: Polygaug Industries Ltd.
Read: Polygaug Case History (handout)
Grasley - "Seekers and Suppliers of Risk Capital" (handout)
Prepare: Analysis of Polygaug Case History for discussion

Class Meeting #5 - Monday, January 29

Lecture: Guest (R.C. Maybee, President, Polygaug) (tentative)
Read: Developing the Business Plan - text - pp. 417-447
Prepare: text - pp. 449-454

Class Meeting #6 - Monday,

Lecture: Sources of New Venture Financing
Read: Chapter 15 text - pp. 457-480
Prepare: text - pp. 481-485

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Class Meeting #7 - Monday, February 12

Lecture: Technical Innovation & Invention as a New Venture Base
Read: Sources of Venture Capital in Canada - handout
pp. 1-30
Prepare: text - pp. 533-540

Class Meeting #8 - Monday, February 19

Lecture: Guest: The Role of Venture Capital
Read: Chapter 17 text - pp. 505-527

READING WEEK - February 26 - March 2 - no class

WORK ON YOUR BUSINESS PLAN!

Class Meeting #9 - Monday, March 5

Lecture: Structuring Your Company
Read: "Starting a Small Business in Ontario" - handout

Class Meeting #10 - Monday, March 12

Lecture: Guest: Marketing the New Product - John Fulton, (tentative)
Small Business Consultant Services, Gov. of Ontario

Class Meeting #11 - Monday, March 19

Lecture: First Survival, Then Expansion: Where You Are Going

Class Meeting #12 - Monday, March 26

Lecture: Guest - Burke Brown (tentative)
HAND IN: Business Plan

Class Meeting #13 - Monday, April 2

Lecture: Course Review

EXAMINATION WEEK: April 7/Saturday, 9-11& possibly 14

NOTE: There will be no examination for this course.
Your formal Business Plan will represent your
total mark.

*Dates changed due to holidays on the Monday

ATLANTIC REGION MANAGEMENT TRAINING CENTRE

The Management Training Centre, a not-for-profit organization, has been meeting the need of Atlantic Canada's management community by providing practical 'how-to-do it' management programmes for supervisors, specialists and managers. These programs are conducted in all areas of the Atlantic Provinces and for every type of business, industry, non-profit organization and government. The workshops, seminars and courses are presented by staff specialists of the centre or experienced resource experts.

The following courses offered by the Management Training Centre are of special interest to entrepreneurs and the small business community:

NEW VENTURES

This course is designed for entrepreneurs and those in companies responsible for developing new ventures. It is an entrepreneurial and not a managerial approach to the situation. It covers every aspect of checking a venture for validity and shows the participant how to proceed to obtain funds, to set up marketing and get into production.

This course includes lectures, case study, and preparation of plan for review by panel.

Duration: 2 days

Topics include:

- Developing a Business Plan:
 - Capital Structure
 - Form of Corporation
- Market Assessment and Development:
 - Market Research relating to new product
 - Setting up sales and distribution
- Obtaining Capital:
 - Sources of capital
 - Ensuring you get the right deal from the banks
 - Capital structure to ensure achievement of goals
- From Prototype to Production

* * * * *

ATLANTIC REGION
MANAGEMENT TRAINING CENTRE

CREATIVITY IN ACTION

Every manager, from the first line supervisor to the president, is faced with a multitude of decisions. New products, new ways of doing things, new markets, new strategies, new policies plus a changing environment, economy and attitudes. During these two days we will discuss the nature of creativity, what we can do about it, how we can do it and most importantly how we can apply this information in our own organizations.

This course includes lectures with audio-visual aids.

This course is conducted at any time convenient to the company or organization requesting it.

Topics include:

- What is Creativity and Innovation?
- Inhibitors and Blocks to Creative Thinking and Action
- How to Recognize and Overcome many of These Blocks
- Tools and Techniques for Creative Thinking and Action
- How to Get Lots of New Ideas
- Techniques for Creative Evaluation of Ideas
- Implementation-Action
- Use and Application of the Total Creative Process

* * * * *

MANAGING A SMALL AND RAPIDLY EXPANDING MANUFACTURING FIRM

This course will improve leadership, decision making, conflict resolution, executive succession, and financing of the smaller company. This will be of particular interest to smaller companies anxious to grow.

This course includes lectures with case discussions.

Duration: 2 days

Topics include:

- Reasons for Business Growth
- Setting Goals and Objectives
- How to Achieve those Goals and Objectives
- Market Research for the Small Firm
- Sales Management and Distribution
- Marketing for the Small Firm
- Sources of Funds for Expansion
- Problems Particular to Small Firms
- Developing the Organization to Ensure Long Term Viability

* * * * *

FEDERAL BUSINESS DEVELOPMENT BANK

FEDERAL BUSINESS DEVELOPMENT BANK

The Federal Business Development Bank assists in the establishment and development of small business enterprises in Canada by providing them with financial and management services.

To help improve management skills in small Canadian businesses, the bank conducts management training seminars, at a moderate registration fee, in cities and towns across Canada. These seminars are planned to meet the needs of owners and managers of small businesses. The bank also prepares special joint seminars in co-operation with industry associations and other organizations.

FBDB develops management training courses and distributes them to provincial and territorial education authorities for their use.

The FBDB also publishes booklets on a wide range of topics pertaining to the management of small business in Canada. It distributes a bulletin featuring business developments and at its branch offices it maintains reference libraries with a variety of publications on small management.

FEDERAL BUSINESS DEVELOPMENT BANK

MANAGEMENT TRAINING SEMINARS

The Federal Business Development Bank offers a series of Management Training Seminars specially oriented toward the problems of small business operators. These one-day sessions follow a carefully designed set of procedures geared to giving the most information possible in the limited time available. Each topic is dealt with in a clear, easy-to-follow, step-by-step fashion. The Seminar is built around a case study, a real-life business experience, adapted for the meeting. Under the direction of an experienced moderator the case is discussed by the participants who will approach the situation in small workshop groups, which permit everyone's participation. At these Seminars, the group is able to profit from the personal experience of the individual participants.

Further information regarding these seminars may be obtained from any Branch office of the Federal Business Development Bank.

DESCRIPTIONS OF MANAGEMENT SEMINARS FOR SMALL BUSINESS

Financial Statements - Forecasting For Expansion

This seminar introduces the participants to the necessary tools to be used in the decision-making process for an expansion program of a small enterprise. Topics to be covered include the analysis of Financial Statements, and forecasting.

How to Prepare a Cash Flow for a Small Business

This seminar has been developed for small business operators who want to have better control of their cash resources. Participants will review financial statements and will be introduced to the principles of forecasting. This will lead into the purpose and preparation of a "cash flow chart", which enables a business to anticipate cash shortages or surpluses, so that practical financial planning is possible.

Registrants will complete straight-forward exercises at each step to ensure that every participant has a good understanding of the procedures. The afternoon will be spent in smaller groups developing a more complex cash flow chart for a typical small business.

At the end of the seminar, each registrant should be able to complete a cash flow chart for his/her own business and understand how this can be used to discuss the financial needs of the business with bankers, suppliers or other interested parties.

FEDERAL BUSINESS DEVELOPMENT BANK

Personnel Administration and Cost Controls

Finding the right person for any job is one of the most important, and one of the most difficult tasks, facing the small business person today.

Registrants at this seminar will become involved, not only in the hiring process, but in all of the administrative decisions affecting employees. Some elements of cost control will also be reviewed during the case discussion.

Choosing, Leading & Motivating Personnel

Productivity, team spirit and motivation are key words that influence management/staff relations. All too often the neglect or misrepresentation of these terms affects a business profit picture.

The purpose of this seminar is to clarify these principles and help the participant apply them to his/her business.

Taxation: An Introduction

Every year small businesses across Canada don't know if they pay more than they should in taxes to both their Provincial and Federal Governments. Many owners of small businesses across the country simply don't know the effects on their tax picture of such actions as incorporation, employment of their spouse and the payment of dividends, among others.

This seminar is provided to equip the participants with some tools that they will need to make the most of their situation. Participants will be shown how to make basic, but important calculations and comparisons to keep their income taxes to a minimum.

Financial Analysis - Term Loan Analysis

This seminar proposes a set of simple techniques which all small businessmen can use when evaluating the financial health of their business and also a series of practical questions which should be answered when considering a proposal for a term loan.

Bookkeeping - Why and How?

An introduction to bookkeeping techniques. How to set up Journals, records transactions, post the General Ledger and perform the preliminary steps for preparation of the Financial Statements.

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Marketing - An Introduction

This seminar deals with the basic principles which are involved in all successful marketing programmes and reviews the important relationships between price, type of product or service, customer "wants", as well as the advertising methods used to achieve profit goals.

How to Sell to Governments

No Description Available.

Increasing Your Profits

This seminar has been prepared for the small business owners/operators who wish to become more aware of the cost reducing techniques to improve the profitability of their businesses. Participants will review the revenue-to-profit ratio, the effect of inflation on both cost and profitability, and suggest means of improving productivity. Major areas of cost, applicable to almost every business, will be discussed, as will the effect of price cutting on profit margins. Alternatives and practical suggestions will also be outlined, so that registrants can begin immediately on their own programmes for increasing their profits.

Promotion and Advertising

(Presently being developed.)

TIME MANAGEMENT

Everyone in business knows the problem of having too many demands on their time. This new, 3 hour seminar, reviews several well proven and successful techniques for making the very best use of this most valuable & limited resource, to ensure that the really important things get done. How to delegate effectively and how to avoid procrastination, are also dealt with in clear, easy-to-understand exercises and studies, especially developed for those in small business.

TAX PLANNING

Important considerations with regard to income tax planning are dealt with in this new seminar. Various methods are reviewed, including dividends, bonus payments and retirement planning, as well as other factors which can affect the financial health of a small business and that of its owner.

RETAILING

This seminar is designed not only for those already involved in this very important sector of our economy, but for the many individuals who are planning to start a retail business

of their own. Choosing a location, pricing and store layout are reviewed, as well as advertising and promotional considerations. At the conclusion of this seminar, registrants should have a better understanding of the many complexities involved in starting and managing a success retail business.

NEW SUBJECTS

Two new seminars are currently under development - Farm Accounting and Advertising & Promotion in Small Business. It is expected that both will be available in the next fiscal year.

FEDERAL BUSINESS DEVELOPMENT BANK

OWNER/MANAGER COURSES

The owner/manager courses are a Federal/Provincial Program of a cooperative and voluntary nature. The basis of the owner/manager program is that the FBDB is responsible for developing and presenting course materials, while Provincial Departments of Education are responsible for all aspects of delivery in their province.

The owner/manager courses are usually offered by the Continuing Education Department of Community Colleges and CECEPs. For further information on the owner/manager program, contact the nearest Community College (CEGEP), or the Department of Education of your province.

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LIST OF OWNER/MANAGER COURSES

FINANCE AND TAXATION SERIES

- Fundamentals of Financial Management (1978)
- Financial Decisions for Small Business (1979)
- Credit and Collections (1968)
- Taxation (1975)
- Inventory Management (1978)

GENERAL

- How to Start a Small Business (1978)
 - Description of classroom video-cassettes
 - Description of broadcast TV series
- Exporting (1976)
- Purchasing (1973)
- Data Processing in a Small Business (1978)
- Business Law (1968)
- Business Law (1979) - Ontario Version

HOSPITALITY/TOURISM SERIES

- Marketing for the Hospitality Industry (1967)

MANAGEMENT SERIES

- The Management Process: A Systematic Approach (1978)
- Organizational Behaviour (1977)
- Communication and Interpersonal Relations (1977)
- The Social Responsibility of Business (1977)
- Business Policy (1977)
- Management by Objectives and Results (1977)
 - Description of classroom video-cassettes
- Human Resources Management (1975)

MANUFACTURING AND PRODUCTION SERIES

- Manufacturing, Planning and Control (1972)
- Cost Accounting - Manufacturing (1967)

MARKETING SERIES

- Marketing for Small Business (1978)
- Forecasting: Predict Your Sales and Profits (1979)
- Marketing Your Product (1979)
- Marketing Management for the Middleman (1973)
- Practical Decision-Making in Marketing (1973)

RETAILING SERIES

- Retailing: An Introduction (1978)

SALESMANSHIP SERIES

- Retail Selling (1966)

FEDERAL BUSINESS DEVELOPMENT BANK

BOOKKEEPING AND AN INTRODUCTION TO ACCOUNTING (1979)

STATUS

Introductory level. Part of a current series. In modular format.

OBJECTIVES

To define the theory of accounting and explain the Accounting Cycle.

To provide basic knowledge of bookkeeping and accounting and to identify basic controls for the most important items in any small business.

INTENDED PARTICIPANTS

Owners, managers and bookkeepers who want to know what bookkeeping and accounting are all about. No previous knowledge of bookkeeping or accounting is needed.

COURSE MATERIALS

Modular texts including readings, problems and glossary. Leader's Notes.

COURSE OUTLINE

- | | |
|----------|--|
| Module 1 | Definitions |
| | - Bookkeeping |
| | - The Accounting Cycle and the Financial Statements |
| | Problems |
| | Glossary of Terms |
| Module 2 | The Recording Process |
| | - The Double Entry System |
| | - The Recording Process and the Journals vs "T" Accounts |
| | Problems |

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- Module 3 The Ledgers and the Trial Balance
- The General Ledger
 - The Subsidiary Ledger
 - The Trial Balance
- Problems
- Module 4 The Worksheet
- The Worksheet
 - The Adjusting Entries
 - Example of a Worksheet and Adjusting Entries
- Problems
- Module 5 The Financial Statements and the Closing Entry
- Financial Statements
 - The Closing Entry and the Post Closing Trial Balance
- Problems
- Module 6 Example (of the Accounting Cycle)
- Recording Transactions
 - Posting to the Ledgers and Taking a Trial Balance
 - The Worksheet
 - The Financial Statements and the Closing Entry and the Post Closing Trial Balance
- Summary
- Module 7 Cash
- Cash Control
 - Petty Cash
 - Bank Reconciliation
- Problems
- Module 8 Accounts Receivable
- Controls of Accounts Receivable
 - Collection of Accounts Receivable
 - Losses on Accounts Receivable
- Problems
- Module 9 Inventory
- Recording Inventory
 - The Evaluation of Inventory
 - Control of Inventory
- Problems
- Module 10 Salaries
- Employees Files
 - Salaries and Deductions
 - Payroll Control
- Problems

FEDERAL BUSINESS DEVELOPMENT BANK

FUNDAMENTALS OF FINANCIAL MANAGEMENT (1978)

STATUS

Introductory level. Part of a current series (Revised in 1978).

OBJECTIVES

To provide the new business person with an understanding of and an appreciation for basic financial statements.

To develop or improve the new business person's ability to make better financial management decisions.

INTENDED PARTICIPANTS

Owner/managers of small businesses, especially those who are sensitive to the financial conditions of their operations, other managers and supervisors who want a better appreciation for financial statements and financial management and skill-proficient entrepreneurs starting a business.

COURSE MATERIALS

Texts, case studies, Leader's Notes (with case solutions).

COURSE OUTLINE

- Module 1 The Income Statement
- Components of the Income Statement and their usefulness
 - How to record transactions using the Double Entry Bookkeeping System
- Case: George's Sporting Supplies (A)
-
- Module 2 The Balance Sheet
- Explains Balance Sheet Items and the relationship to the Income Statement
- Case: George's Sporting Supplies (B)

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- Module 3 Working Capital
- Shows how it is calculated and outlines the usefulness of working capital
Case: T.C.L. Toys Ltd.
- Module 4 Financial Analysis: Primary Ratios
- Shows how to calculate the most important ratios and how they can be used in analysing financial statements
Case: George's Sporting Supplies (C)
- Module 5 The Break-Even Point
- Explains the components of the break-even and shows three methods to calculate it
Case: Zappos
- Module 6 The Source and Application of Funds
- Defines the Source and Application of Funds Statement and gives an example.
Case: Mary's Productions Reg'd.
- Module 7 The Opening Balance Sheet
- Reviews the Balance Sheet and explains what a Pro-Forma Balance Sheet is and why it should be prepared.
Case: Hel N' Hank Reg'd.
- Module 8 The Pro-Forma Income Statement (Profit Forecast)
- Explains how to forecast for a new and an existing business
Case: Janet and Daughters (A)
- Module 9 The Pro-Forma Balance Sheet
- Explains the elements of the Pro-Forma Balance Sheet
Case: Janet and Daughters (B)
- Module 10 The Cash Budget
- Explains how to prepare a cash budget and shows its use
Case: XYZ Company

FEDERAL BUSINESS DEVELOPMENT BANK

FINANCIAL DECISIONS FOR SMALL BUSINESS (1979)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To promote an understanding of effective financial management.

To develop an analytical approach to financial planning (through case studies) as an aid to determining the profitability of projects and growth of operations.

INTENDED PARTICIPANTS

Owner/managers and key employees of any type or size of enterprise and people thinking about starting a business. Also for those who have taken "Fundamentals of Financial Management" and want to follow a more advanced course.

COURSE MATERIALS

Case studies, readings, Leader's Notes. It is primarily made up of case studies with short background texts.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Introduction - Sources and Use of Funds
Case: Canada Cartage Company |
| Module 2 | Short-Term Cash Requirements
Case: Simons Sportswear Ltd. (A & B) |
| Module 3 | Investment of Short-Term Cash Surpluses
Case: Confex Foods Limited (A) |

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- Module 4 Lease or Buy Decisions
 Case: Simons Sportswear Ltd. (C)

- Module 5 Term Loans
 Case: Confeed Supplements Company (A)

- Module 6 Long-Term Funding
 Case: Wogobo Resort Limited

- Module 7 Investment Alternatives
 Case: Confeed Supplements Company (B)

- Module 8 Investment Management
 Case: Confex Foods Limited (B)

- Module 9 Estate Planning
 Case: Fashion Arts Limited

- Module 10 Summary
 Case: Modern Teaching Company

FEDERAL BUSINESS DEVELOPMENT BANK

CREDIT AND COLLECTIONS (1968)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To provide a basic knowledge of the principles of consumer and mercantile credit.

To examine the techniques of profitable credit investigation and approval.

INTENDED PARTICIPANTS

Owner/managers, employees who handle or are being trained to handle credit granting or collection responsibilities and sales personnel in any retail, commercial or industrial enterprise.

COURSE MATERIALS

Texts, case studies, Leader's Notes.

COURSE OUTLINE

- Module 1 The General Concept of Credit
- Origin and History of Credit
 - Why is Credit Used?
 - Types of Credit and Credit Instruments
 - Questions for Discussion
- Case: Patbarb's Fashion Wear
-
- Module 2 Terms of Sale
- Mercantile Credit Terms
 - Cash Discounts
 - Consumer Credit Terms
- Cases: The Capital Paint Corp. Ltd.
The Towne Variety Store

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- Module 3 Guiding Principles of Credit Analysis
Cases: Sellers Department Store
 Production Fabricators Ltd.
- Module 4 How to Read a Financial Statement
Case: The Capital Paint Corp. Ltd.
- Module 5 Services of Credit Associations and Other
Major Financial Institutions
Cases: The ABC Company Ltd.
 "Crowns" Variety Store
 Carl Del Grande
- Module 6 Mercantile Collections
Cases: Collection "Stickers"
 White's Wholesale Hardware Ltd.
- Module 7 Consumer Collections
Cases: Sellers Department Store
 The Case of Mr. H.T. Robinson
- Module 8 Credit and Collection Correspondence
Quick Test No. 1
Quick Test No. 2
Quick Test No. 3
- Module 9 Bad Debts
- Bankruptcy
Case: Jade Distributors Ltd.
- Module 10 Collection Legislation
- Small Debts and County Courts
- Judgment and Writ of Execution
- Garnishment
- Statute of Limitations
- Conditional Sales Act
- Bulk Sales Act
- Mechanics Lien Act
- Warehouseman's Lien Act
Cases: The Capital Paint Corporation Ltd.
 Stone's Hardware Store
- Module 11 Courts of Law
- Division Court
- County Court
Case: Coupland Milk Company
- Module 12 Builders Credit
- Questions for Discussion

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TAXATION (1975)

STATUS

Intermediate level. Last update 1975. Currently being revised.

OBJECTIVES

To explain and illustrate the main aspects of taxation and define the important elements.

To discuss advantages and disadvantages of incorporation.

INTENDED PARTICIPANTS

All those who wish to know more about Taxation.

COURSE MATERIALS

Texts, case studies and Leader's Notes.

COURSE OUTLINE

- Module 1 Introduction to Taxation
 - Introduces the course and the taxation vocabulary.
 Case: Driftwood Motel and Restaurant
- Module 2 Problems of Individuals
 - Reviews in detail some key provisions of the Tax Act.
 Case: Brian Cronan
- Module 3 Capital Gains Tax
 - Explains the problems related to the Capital
 Gains Tax.
 Case: Doug Pometer

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- Module 4 Problems of Partnerships
- Introduce the participants to the basic implications of the Act as it affects partnerships.
Case: Carlyle, Bushwalk and Stewart
- Module 5 Problems of Farmers
- Concentrates on the special problems facing farmers under the new Act.
Case: John Sherman, Beef Farmer
- Module 6 Problems of Corporations
- Concentrates on some of the key provisions of the Income Tax Act as they affect small businesses operating as corporations.
Case: Atlas Hotels Limited (A)
- Module 7 Problems of Corporations
- Focuses attention on the mechanics of calculating the new surplus accounts introduced in the Act.
Case: Atlas Hotels Limited (B)
- Module 8 Federal Sales Tax
- Examines the impact of the Federal sales tax regulations on the operations of a wholesaler.
Case: Kemble Wholesale Plumbers Limited.
- Module 9 Succession Duties and Estate Planning
- Emphasizes the value of planning for business continuity and minimization of succession duties.
Case: Fashion Arts Limited.
- Module 10 Re-Assessment and Review
- Explains what to do if you disagree with the Income Tax Assessment.
Case: William Nash

FEDERAL BUSINESS DEVELOPMENT BANK

INVENTORY MANAGEMENT (1977)

STATUS

Advanced course. Part of a current series.

OBJECTIVES

To provide a basic knowledge of the principles of inventory management.
To examine the different inventory management methods and techniques,
and to complete an implementation plan.

INTENDED PARTICIPANTS

Administrators, purchasing agents, supervisors, and managers (and/or owners) who handle or deal with inventory.

COURSE MATERIALS

Texts, group exercises, bibliographies, case studies, Leader's Notes.

COURSE OUTLINE

- Module 1 Inventory: Definition and Role Within the Firm
- Components of inventory
 - Why set up inventory?
 - Classifying inventory
 - Two types of manufacturing
- Exercise: Inventory Questionnaire
- Module 2 The Costs Associated With Inventory Management
- Analysis of inventory costs
 - Costs of acquisition, possession and loss
 - Costs of too high or too low an inventory level
- Case: Peter's Soft Drinks Inc.
- Module 3 Planning and Forecasting Needs
- Stages of planning
 - Information for planning
 - Specific situations
- Case: Superior Textiles

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- Module 4 Purchases and Supplies
- Purchase and inventory management
- Managing purchases and supplies
Case: Richardson Machine Shop (1976)
- Module 5 The Interrelationship Between Financial Planning,
Inventory Control, Sales Forecasts, and Produc-
tion Requirements
- Sales forecasts
- Budgetary control
- Production planning
Case: Payette Enterprises Inc.
- Module 6 Physical Inventory Management
- Storage functions, types and locations
- Warehouse organization
- Handling stored goods and returns
Exercise: Bel-Val Co.
Case: Eclair Industries
- Module 7 Methods of Inventory Management - I
- 4 methods
- The ABC method for planning and control
Case: Today's Kitchen Inc.
- Module 8 Methods of Inventory Management - II
- Turnover and storage time
- Costs per order and other inventory costs
- Economic order quantity
- Module 9 Methods of Inventory Management - III
- Reorder points
- Computer applications
- Visual control and card-index system
Case: Whitelander Ltd.
- Module 10 Inventory Management System
- The what and why's of an inventory management
system
- A model of a system
- Using a system of inventory management
Exercise: Inventory System Questionnaire

FEDERAL BUSINESS DEVELOPMENT BANK

HOW TO START A SMALL BUSINESS (1978)

STATUS

Introductory level. Part of a current series. In modular format.

OBJECTIVES

To outline the main considerations for success in a small business and to describe ways of better insuring that success.

INTENDED PARTICIPANTS

Anyone interested in starting a small business and people who have just recently started one.

COURSE MATERIALS

Student text, glossaries, readings, exercises, case studies, Leader's Notes and (optional) video-cassettes (see separate description).

COURSE OUTLINE

- Foreword
- Foreword and Table of Contents
 - Reading on "How to Analyse a Case Study"
- Module 1
- So You Want to Start Your Own Business...
 - The nature of small business, reasons for starting, pros and cons, and the importance of the business plan.
 - Project Exercise: Self-Survey
- Case: Toba Supplies Company

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- Module 2 Does Government Help or Hinder?
- Forms of business organization and factors to consider.
- Project: Government Regulation Checklist.
Case: Petersen Building Supplies Co.
- Module 3 Do You Have to Start From Scratch?
- Starting on Your Own Vs. Buying Vs. Franchising.
- Project: Business Investigation Checklist.
Case: Joan Simpkins
- Module 4 Finding Your Niche in the Market.
- Investigating the Market to See if the Business is Viable.
- Promoting the New Business and the Marketing Plan.
- Project: Marketing Checklist.
Case: Thermo Wash
- Module 5 Why Financial Statements?
- Preparing the Balance Sheet and Profit and Loss Statements.
- Using Financial Statements.
- Project: Accounting System Checklist.
Case: The Alfred Supply Company
- Module 6 Financial Analysis.
- Budgets, Forecasts (Pro-Forma Statements), Break-Even Analysis and Cash Flow.
- Project: Financial Planning Checklist.
Case: Simo Company
- Module 7 Financial Planning.
- Determining Financial Requirements, Sources of Finance, and Working Capital.
- Project: Financial Planning Worksheet.
Case: Bronda Registered
- Module 8 Purchasing and Inventory Control.
- What Goods to Carry, Where to Get Them, and Controlling the Goods.
- Project: Merchandise Handling Checklist.
Case: Boutique El Toro

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Module 9

Managing Your Staff for Good Results.

- Organization Structure, Payroll, Hiring and Record-keeping.
- Project: Key Considerations in Setting Up a Personnel System.

Case: Martinville Bakery Inc.

Module 10

So Now You Can Start Your Business.

- Course Review Checklist covering all the main topics in Modules 1 through 9.

Case: The Madsen's Delemma (A Comprehensive Case Study)

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HOW TO START A SMALL BUSINESS CLASSROOM VIDEOCASSETTE SERIES (1978)

This series of 10 video-cassettes is designed to support the written series by providing information and experiences from owner/managers and professionals from the small business sector.

Using an interview technique, some twenty business people relate their experiences and problems in each of the ten topic areas dealt with in the course. It is an ideal way to translate the theory of the written course into reality as seen by small business owner/managers.

MODULE 1: SO YOU WANT TO START YOUR OWN BUSINESS!
(11:00 minutes)

An overview of the series. On-site commentaries from owners who outline their reasons for starting a small business, the way they got started and some of the problems they encountered.

MODULE 2: DOES GOVERNMENT HELP OR HINDER?
(13:06 minutes)

A lawyer who specializes in small business looks at the advantages and risks of each form of business, as well as the costs and procedures involved. His comments are backed up by testimonials from a few owner/managers.

MODULE 3: DO YOU HAVE TO START FROM SCRATCH?
(10:50 minutes)

An example of each way of getting into business is shown with comments by the owner and a C.A. These owners' observations are sure to make a person consider these 3 alternatives more carefully.

MODULE 4: FINDING YOUR NICHE IN THE MARKET
(19:25 minutes)

With the help of two marketing consultants and three owner/managers, the program explores the sources of information available (often at no cost) to zero in on the marketplace. The owner/managers also talk about the usefulness of advertising in attaining their objectives.

MODULE 5: WHY FINANCIAL STATEMENTS?
(14:22 minutes)

This program looks at the importance of bookkeeping, profit and loss statements, balance sheets and business ratios. With the help of a chartered accountant, representatives of Dun & Bradstreet, FBDB and the Royal Bank, the viewer will get an overview that, as one of the owner/manager's explains, gives you "a good barometer to gauge whether or not you are making or losing money".

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MODULE 6: FINANCIAL ANALYSIS

(21:06 minutes)

This program looks at the importance of determining objectives, establishing short and long-term goals and preparing budgets and cash forecasts. The importance of forecasting is highlighted by small business owners, an accountant and a banker.

MODULE 7: HOW MUCH MONEY DO I NEED AND WHERE DO I GET IT?

(18:40 minutes)

With the help of an accountant and four businessmen, the viewer will get an appreciation of the money needed to get a business off the ground. Representatives from the Royal Bank, FBDB, the Department of Industry, Trade and Commerce and an accountant plot the search for that all important dollar.

MODULE 8 PURCHASING AND INVENTORY - WHAT TO BUY AND HOW TO CONTROL IT

(15:10 minutes)

Four purchasing methods are explained, followed by an accountant and businessmen who highlight the importance of choosing a good supplier and the importance of control. Anecdotes on responsibility and theft are given and insurance is explained by a broker.

MODULE 9: MANAGING YOUR STAFF FOR GOOD RESULTS

(19:30 minutes)

The selection of staff is explained by drawing on the experience of personnel consultants, owner/managers, an insurance representative and Revenue Canada. The program looks at the selection process, payroll set-up and administration, employee benefits, motivation of staff and employee training.

MODULE 10: SO NOW YOU CAN START YOUR OWN BUSINESS

(13:15 minutes)

A capsule review of the important questions to be considered before starting. All subjects are touched on with interesting anecdotes and observations from consultants, lawyers, accountants, lenders and many small business owner/managers. The program ends by providing a good impression of how owning a small business radically changes one's personal life.

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HOW TO START A SMALL BUSINESS BROADCAST TV SERIES (1979)

This series of 10 half hour TV shows is designed to support the written course material. It is intended from home viewing on broadcast (or cable) TV, to be followed later that week by a classroom presentation of the same module.

Hosted by Percy Seltzman and using three professional actors, the main topics in each module are highlighted through a series of skits. The result is a program that is not only humorous and entertaining but also educational.

MODULE 1: SO YOU WANT TO START YOUR OWN BUSINESS!

This show highlights the reasons for starting your own business and acts out a case study of someone actually making this decision followed by a discussion on the elements of a business plan. The host concludes that "this is just a beginning, but an important first step".

MODULE 2: DOES GOVERNMENT HELP OR HINDER?

This show considers different attitudes about government regulations and looks at gathering the information. The three different forms of business organization are explored by having each actor select a business and deciding which form is most suited.

MODULE 3: DO YOU HAVE TO START FROM SCRATCH?

After reviewing the main points of the first two shows, the three main routes/into one's own business are explored by having each actor pick their "dream" business and develop it. In one case, two available businesses are investigated and it is decided to start from scratch. In another case, the actors find a business that appears worthwhile and determine the information required before making an offer. Finally, we see a meeting of one of the actors with the representatives of "Frank's Red Hot Puppies Franchises" and we get his reaction to this approach to getting into business.

MODULE 4: FINDING YOUR NICHE IN THE MARKET

After considering the importance of salesmanship, the host points out that there is more than this involved. In one situation we see a prospective owner investigating a business and learn the sources of information to define a market. In the next situation, we see an amusing market study, and finally, we see an owner realizing that she has not been in touch with her market and beginning to realign her plans to improve this. Host concludes by pointing out the importance of knowing your customer.

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MODULE 5: WHY FINANCIAL STATEMENTS

Illustrated by a business that is not really making any money, the importance of finding out actual financial position is highlighted. We then move on to a situation in which an owner/manager is not aware of how much money he is losing because of his lack of good statements. The host summarizes the two basic statements so that in the next situation we can see an owner who does some analysis and gains new insights into her business.

MODULE 6: FINANCIAL ANALYSIS

This show opens with three different points of view on what controlling a business is all about. Host sums up and we then tune in one a business in trouble. A "Wizard" shows up to show how forecasts and financial planning can solve their problems. They settle down to working out the details of a budget and a cash forecast, and the show concludes with a demonstration of the usefulness of a "moveable break-even chart".

MODULE 7: FINANCIAL PLANNING

After highlighting the need for planning, we see a business owner and her store manager establishing their needs for a new branch operation followed by an interview with the bank manager to arrange a loan. The next situation shows an inventor who has done no financial planning and we learn what a financial plan consists of and what sources of financing might be available.

MODULE 8: WHAT TO BUY AND HOW TO CONTROL IT

After introducing basic ideas on inventory control, we see a store owner, his wife and their manager trying to find ways to avoid the annual inventory count. After some amusing confusion, they come to understand the need for the inventory count and then discuss their overall inventory control system. In a different situation, we see an owner with her store manager discussing their opening inventory and its costs. This is followed by a meeting with a supplier in an incident that highlights the importance of knowing your requirements and knowing how to deal with suppliers effectively.

MODULE 9: MANAGING YOUR STAFF FOR GOOD RESULTS

In this show, we see a prospective job applicant meeting two different businesses. One is run in an autocratic way, the other in a "family style". We see the pros and cons of each style at the same time that we see the hiring process underway. Viewers are left to come to their own conclusions.

MODULE 10: SO NOW YOU CAN START YOUR BUSINESS

This show summarizes the previous nine and wraps up the series. In it, we see the three actors and the host viewing experts of the previous nine shows and providing their comments on what they, as non-business people, have learned from the experience. As a wrap-up and review, the show highlights the main themes of each module and closes the series in a relaxed and informal way.

FEDERAL BUSINESS DEVELOPMENT BANK

EXPORTING (1976)

STATUS

Intermediate level. Part of a current series (revised in 1976).

OBJECTIVES

To familiarize participants with the basic techniques and procedures involved in export marketing, to compare these techniques and procedures with those used in domestic marketing, and to develop an appreciation for the export market as a source of new business opportunities.

INTENDED PARTICIPANTS

Owner/managers of firms with exportable goods and services, their sales representatives, supervisors and staffs. Of particular interest to those preparing to enter the export trade. Generally, participants should have some knowledge of the mechanics of exporting.

COURSE MATERIALS

Case studies, reading notes and Leader's Notes.

COURSE OUTLINE

- Module 1 Analyzing Export Marketing Opportunities
- What is Export Marketing?
 - Know Your Foreign Markets
 - Forecast Your Foreign Business Opportunity
- Case: Tubular Furniture Ltd. (A)
- Module 2 Organizing For Export Sales
- How to Select Export Markets
 - Organizing Direct Foreign Sales
 - Exporting Through Agents
- Case: Tubular Furniture Ltd. (B)
- Module 3 Financing Exports
- What Criteria Are Used in Granting Credit
 - How to Handle Credit to Foreign Customers
- Case: Evenflo Manufacturing Ltd.

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- Module 4 Pricing Exports
- Determine Your Prices for Export Sales
- Calculate Your Export Costs
- How to Quote on Export Business
- How to Control Your Exports Sales
Case: M.L. Food Products Ltd.
- Module 5 Appointing a Manufacturer's Agent In Japan
- Select Your Agent
- What Kind of Agreement Should you Negotiate
 With Your Agent
Case: Pacific Chain Saw Ltd.
- Module 6 Exporting to the European Economic Community
- Advantages and Disadvantages of Exporting
- Will Your Product be Accepted by Foreign Customers?
- Is Your Company Eligible for Government Assistance?
Case: Canadian Waste Disposal Systems Ltd.
- Module 7 Exporting to the People's Republic of China
- How to Promote Export Sales
Case: Precision Metrology Ltd.
- Module 8 Developing an Overseas Distributive Strategy
- Select Your Distribution Channel
- Plan Your Distribution Channel
Case: National Fixtures Ltd.
- Module 9 Grouping For Export
- Pros and Cons of Forming an Export Group
- Who Should be Members of the Group
Case: Manitoba Apparel Export Group (Mapex Group)
- Module 10 Establishing an Overseas Operation
- Licensing Arrangements
- Joint Ventures
Case: Spartan Manufacturing Ltd.
- Module 11 Design for Export Marketing
- What is the Relationship Between Industrial
 Design and Marketing?
Case: Sanitation - Picker

FEDERAL BUSINESS DEVELOPMENT BANK

PURCHASING (1973)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To understand certain fundamental principles in purchasing which help avoid costly errors and build a more profitable operation.

INTENDED PARTICIPANTS

Owner/managers and all staff with purchasing responsibilities in any type of manufacturing or distribution business, whatever the size.

COURSE MATERIALS

Case studies, student reading notes and Leader's Notes.

COURSE OUTLINE

- Module 1 Purchasing and Profits
- Impact of Purchasing on Profits
 - Organize Your Purchasing Department
 - How to Manage the Purchasing Function
- Cases: Specialty Steel Fabricators Ltd.
 Sounds for Pleasure
- Module 2 Setting Purchasing Specifications
- How to Classify Your Purchases
 - Select Your Specification System
- Cases: Novelty Manufacturing Company
 L.C. Variety Store
- Module 3 How Much to Purchase?
- Forecast Your Requirements
 - Determine Your Inventory
 - Plan Your Purchasing in Relation to Anticipated Demand
- Cases: X.Y.Z. Company
 B.J. Hardware Store

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Basic Inventory Control and Purchasing
- How to Determine Your Safety Stock
- How to Reorder
Cases: Easy Open Door Company
 Cozy Corner Variety Store
- Module 5 Selecting Suppliers
- Know Your Sources of Supply
- Evaluate Your Suppliers
- Select Your Suppliers
Cases: Eldora Structural Glass
 Bill Bader Sporting Goods
- Module 6 Determining Prices
- Profitability and Purchasing
- How to Negotiate Prices
Cases: Argus Sporting Goods
 Light in Your Life
- Module 7 Other Costs in Purchasing
- How to Handle External Costs (Transportation,
 In-Transit Insurance, Taxes, etc.)
- Reduce Your Internal Costs by Control
- Did You Get What You Ordered?
Cases: Adams Toy Company
 R & S Variety Store
- Module 8 Purchasing Procedures
- Establish Your Own Procedures
- Purchasing Requisitions and Orders
- Receiving and Inventory Procedures
- Control Your Suppliers' Performance
Cases: Special Paper Products Company
 Joe's Corner Store
- Module 9 Value Analysis
- What is Value Analysis?
- How to Analyze Value of Products
- How to Implement Value Analysis
Cases: All Warm Furnace Company
 Bob and Ann Peters Boutique
- Module 10 Purchasing Outside Canada
- How to Select Foreign Suppliers

- Importers and Representatives Can Save You Money
- Sources of Assistance
Cases: Scientronics Limited
 Martin and Stoner Clothing and Accessories

FEDERAL BUSINESS DEVELOPMENT BANK

Module 11

"MAKE" vs. "BUY"

- Could You Make Your Own Goods?

- Will it be Profitable?

Cases: High Voltage Transformer Co.

Knowles Camera Store

Module 12

Evaluating Purchasing Effectiveness

- The Management Process in Purchasing

Cases: Easy Rocking Chair Company

Good Earth Discount Store

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 3 System - Definition - Case 1
 - No text
 Case: How to Set Up an Efficient System
- Module 4 System Definition - Case 2
 - No text
 Case: Setting Up Your Own System
- Module 5 Selecting the Right Kind of Data Processing
 Resources
 - Manual Data Processing Procedures
 - Accounting Machines
 - Data Centers
 - Mini Computers
 Case: Building Contractor
- Module 6 Acquisition of Data Processing Resources
 - What Should You Request for Tenders Specify
 - How to Evaluate Tenders
 - Selection of Supplier
 Exercise: Selecting a System Proposal
- Module 7 Technical Aspects of System Development
 - Conception of a System
 - How to Control Your System
 Exercise: Developing a System
- Module 8 Implementation of Data Processing Systems
 - Strategies for Implementation
 - You Have to Plan to Succeed
 Exercise: Implementation Schedule
- Module 9 Operation of Data Processing Systems
 - Define Your Needs
 - Organize Your Structure
 - Control Your System
 Exercise: Defining Forms and Controls
- Module 10 Special Needs
 - How to Adapt Data Processing to Your Needs
 Case: Introducing a New Product

FEDERAL BUSINESS DEVELOPMENT BANK

BUSINESS LAW (1968)

STATUS

Intermediate level.

OBJECTIVES

To learn to recognize and deal more effectively with the legal aspects of business.

To improve communications with lawyers, and to be able to understand and apply their advice.

INTENDED PARTICIPANTS

Owner/managers, office managers and key employees who have or seek management or supervisory responsibility as well as anyone thinking about starting a business.

COURSE MATERIALS

Readings, case studies, and Leader's Notes.

COURSE OUTLINE

- Module 1 Formation of a Contract
- What is a Contract?
 - Do You Always Need a Written Contract?
 - Can You Enforce a Contract?
- Case: Lyons and Smith Furniture Company
- Module 2 Discharge of a contract
- What do You do if Your Contract is Breached?
- Case: Martin and Fleming Manufacturing Ltd.
- Module 3 Liability of an Employer for Acts of Employees - Insurance Contracts
- You are Responsible for Your Employees
 - How to Read and Negotiate an Insurance Contract
- Case: Metro Drive-in Movie

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Sale of Goods
- Change of Ownership
- Guarantees
Case: Allison Wholesale Electric Limited
- Module 5 Conditional Sales, Chattel Mortgage and Bailment
- What is the Use of Conditional Sales Agreements?
- How to handle a Chattel Mortgage
- What is a Bailment?
Case: William Martin
- Module 6 Employer - Employee Relations
- Legislation Protects Your Employee
- Use of Employment Contracts
Case: Maxwell Dry Cleaning Limited
- Module 7 Creditor's Rights and Negotiable Instruments
- Your Rights as a Creditor
- How to Proceed for Collection
- Some Useful Procedures
Case: Twilight Electrical Service
- Module 8 Partnerships
- What is Your Responsibility in a Partnership Agreement?
- What is a Good Partnership Agreement?
Case: Abel Leather Goods
- Module 9 Corporations
- What is a Corporation?
- Pros and Cons of Incorporating the Business
Case: Abel and Chambers Leather Goods
- Module 10 Leases
- What is a Lease?
- How to Negotiate a Lease
Case: Selright Variety Stores Limited
- Module 11 Bankruptcy
- You and the Bankruptcy Act
- What Happens in a Bankruptcy?
Case: John Warner - Electrical Appliances
- Module 12 Mechanics' Liens
- The Mechanics' Lien Act
Case: Edison Electrical Contractors
- Module 13 Patents, Trade Marks and Unfair Competition
- What is the Use of Patents?
- What is a Trade Mark?
- Copyrights Will Protect You
- The Combines Act
Case: Harry Claus Novelties

FEDERAL BUSINESS DEVELOPMENT BANK

BUSINESS LAW (1979) - ONTARIO VERSION

STATUS

Intermediate level. Part of a current series. Available in modular format.

OBJECTIVES

To provide a better understanding of the laws involved in doing business, to help participants (owner/managers) plan and organize their business within the framework provided by law, and to improve communications and understanding with lawyers.

INTENDED PARTICIPANTS

Owner/managers, their wives/husbands, office managers and key employees who have or seek management or supervisory responsibility as well as people thinking about starting a business.

COURSE MATERIALS

Student texts, bibliographies (for each module), case studies and Leader's Notes.

COURSE OUTLINE

- | | |
|----------|--|
| Module 1 | Introduction
- What is a Law?
- Who Makes Laws?
- Who Handles Laws?
Case: Bernard's Baby Furniture Ltd. |
| Module 2 | Fundamentals of a Contract
- What is a Contract?
- Who is Able to Make a Contract?
Case: Lyons and Smith Furniture Co. |
| Module 3 | Interpretation and Discharge of Contract
- Who is Bound by a Contract?
- Is it Possible to Cancel a Contract?
Case: Wilson and King Paving Contractors Ltd. |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Contractual Remedies
- Is the Contract Completed?
- Are There Any Breaches of the Contract?
Case: Wholesale Manufacturing Co. Ltd.
- Module 5 Corporate Legal Structure - Sole Proprietorship
and Partnership
- Going it Alone or Sharing Your Business - Pros and
Cons, Legal Implications
Case: Wilson's Fruit Farm
- Module 6 The Business Corporation
- What is a Limited Company?
- Different Types of Incorporation
- Rights and Duties of Shareholders
Case: Meadowdale Fruite Farm Ltd.
- Module 7 Bailment
- A Simple Definition
- Bailee's Rights and Liabilities
- Bailor's Responsibilities
Case: Sam Spade and Bavarian Brewery Ltd.
- Module 8 Consumer Protection
- What Does Selling Mean?
- Know Your Customers' Rights
- Is Your Pricing Legal?
Case: Anson Wholesale Electric
- Module 9 Consumer Protection
- Does Your Packaging and Labelling Comply With the
Law?
- Don't Fool Customers With Publicity
Case: Dynamic Ltd.
- Module 10 Consumer Protection
- Industry Legislation
- Safety Criteria
- How to Sell Legally
Case: Campbell Automotive Distributing
- Module 11 Transportation
- Make Sure the Conditions are Clearly Spelled Out
- When is the Product Yours?
Case: Canlit Wholesale Ltd.
- Module 12 Building/Equipment (Safety)
- A Legal Overview of Your Installations
Case: Glass and Plastic Manufacturing Ltd.

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 13 Agency
- What is an Agent?
- Duties and Authorities of the Agent
Case: Diane Watt and Household Electric Ltd.
- Module 14 Environmental Protection and Human Resources
- You are Committed to Your Environment
- Your Employees Have Rights
Case: Henderson Fashions Ltd.
- Module 15 Legal Implications and Pitfalls of Franchising
- What You Should Know About Franchises
Case: The Baker's Oven
- Module 16 Insurance
- What Kind of Insurance Protection Do You Need?
Case: Haliburton Leisure Lodge
- Module 17 Bankruptcy, Receivorship and Liquidation
- What Happens When You Run Into Bankruptcy?
- What Can You do if You are a Creditor?
Case: Osborn Carpets Ltd.
- Module 18 Taxation and Accounting
- How to Handle Taxes
- Your Accounting System - A Legal Tool
Case: Jack and Jill MacDonald
- Module 19 Security
- Protecting Your Funds
Case: Michelle Roy and John Manley's Motors
- Module 20 Industrial Property and Negotiable Instruments
- Protection provided by patents, trademarks,
 industrial designs and copyrights
- Use of Negotiable Instruments as Covered by the
 Bills of Exchange Act (Bills of Exchange, Promisory
 Notes, Consumer Bills and Cheques)

FEDERAL BUSINESS DEVELOPMENT BANK

MARKETING FOR THE HOSPITALITY INDUSTRY (1967)

STATUS

Introductory level.

OBJECTIVES

To familiarize participants with the basic principles of marketing as they apply to the Hotel/Motel Industry.

INTENDED PARTICIPANTS

Owner/managers of small and medium sized hotels/motels and people starting a hotel/motel business.

COURSE MATERIALS

Case studies, student reading notes, Leader's Notes.

COURSE OUTLINE

- Module 1 Analyzing the Marketing Problem
 - Introduction to the Marketing Concept
 Case: Competition Means Change
- Module 2 Sales Planning
 - Discussion of Seven Basic Sales Planning Steps
 Case: The Competitive Squeeze
- Module 3 Equipping to Sell and Service
 - Establishing a "Sales Department" and Making the
 Property "Saleable"
 Cases: Preparing to Sell
 A Look in the Mirror

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Direct Mail as a Marketing Tool
- Types of Direct Mail, Design of Direct Mail Pieces,
 Budgeting and Cost Consideration, Copy and Preparing
 a Direct Mail Program
- Supplementary Readings
Case: Building a Direct Mail Program
- Module 5 Advertising as a Marketing Tool
- Advertising Fundamentals and Review of Various
 Advertising Vehicles
Case: Putting Your Message Across
- Module 6 Supplementary Marketing Aids
- Personal Selling, Telephone Selling, Public Relations,
 Publicity, Outside Agencies and Specialized Advertising
- Supplementary Reading: Showcase for a City
Case: Promoting a New Facility
- Module 7 Promoting Individual Room Business
- Sources for Room Business, Merchandising, and
 Front Office Selling
Case: Creating a New Image
- Module 8 Promoting Convention and Group Business
- Types of Conventions, Soliciting Convention Business,
 Convention Planning and Servicing, Post-Convention
 Procedures, Commercial Exhibits and Specialized Groups
- Supplementary Readings
Case: Getting Your Share of the "Wholesale" Market
- Module 9 Promoting Food and Beverage Sales
- Promotional Opportunities, Individual Food Sales,
 Promotion Campaigns and Special Promotion
- Supplementary Reading
Case: "A Jug of Wine, A Loaf of Bread..."
- Module 10 All Management Decisions Should Relate to Marketing
- The Importance of Implementing Marketing on a
 Systems Basis
- Recommended Readings
Case: An "Average Day" at the Center City Motor Hotel

FEDERAL BUSINESS DEVELOPMENT BANK

THE MANAGEMENT PROCESS: A SYSTEMATIC APPROACH (1977)

STATUS

Introductory level. Part of a current series.

OBJECTIVES

To introduce the basic principles and techniques of management to those who have never studied it before. Emphasis is on the systems approach (planning, organization, directing and controlling).

INTENDED PARTICIPANTS

Anyone interested in studying management for the first time, particularly owner/managers and those who work in small businesses or would like to.

COURSE MATERIALS

Student text, case studies, exercises, readings, bibliography and Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Introduction to the Management Process
- The Systems Concept and the Management Process
Case: Bobois Company Inc. |
| Module 2 | The Evolution of Thought in Management
- General Concepts of the Development of Management Theory
Case: The Coutoure Workshops Inc. |
| Module 3 | Decision-Making
- The Process of Problem-Solving
Exercises |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Leadership Styles
 - The Human Factor, Different Styles and How to
 Choose a Style
 Exercises
- Module 5 Planning
 - Definition, the Planning Process and Techniques
 Case: The Nautica Inc.
- Module 6 Organization
 - The Organization Process and System
 Case: The Trengo Co. Inc.
- Module 7 Management and Motivation
 - The Management Function and Theories on Motivation
 Case: Alco Company Inc.
- Module 8 Control
 - Definition, Theory, Process and Types of Control
 Analysis of Two Cases
- Module 9 Strategy Formulation
 - Relationship Between Firm and Environment, Goals
 and Objectives
 Case: J.A. Halle
- Module 10 Start-Up and Growth Problems
 - Analysis of Strengths and Weaknesses, Stages of
 Growth and Obstacles
 Exercises

FEDERAL BUSINESS DEVELOPMENT BANK

ORGANIZATIONAL BEHAVIOUR (1977)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To improve the understanding of human problems in the working environment and to help participants become more efficient managers of human resources.

INTENDED PARTICIPANTS

Administrators, supervisors and managers in any organization, with special emphasis on small business owner/managers.

COURSE MATERIALS

Student text, cases, incidents and/or group exercises, references, Leader's Notes.

COURSE OUTLINE

- | | |
|----------|--|
| Module 1 | The Human Problems of Small and Medium Enterprises
- Introduction to course and topics covered
Case: The Problems of a Leader of a Firm |
| Module 2 | Similarities and Individual Differences: Personality
- Properties of personality and the development of similarities and differences
Case: George Smith |
| Module 3 | Perception and Communication
- Description of these processes and the factors which influence them
Case: The Ideal Leader |
| Module 4 | Theories of Motivation
- Needs (Maslow), Theories X and Y, achievement motivation, expectations and dissonance theories
- A model of motivation
Case: Gerald Martin Jr. |

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- Module 5 The Process of Influence, Authority, Power and Leadership
- Formal and informal authority, sources of power, process and styles of leadership (managerial grid)
Case: Who is the Boss?
- Module 6 Group Behaviour
- Group concepts, types of groups, group activities and group functioning
Case: Delegation to the Task Group
- Module 7 Satisfaction and Performance
- Company objectives, group objectives and individual objectives and how they interact
Case: The Objectives of the Manager
- Module 8 Organizational Conflict
- Nature and types, sources of conflict and managing conflict
Case: Western Desk Company
- Module 9 Organization Change
- The nature of change, the process and managing change (organization development)
Case: The Manager and Change
- Module 10 The Behavioural Sciences in Organizations
- The influences of environment, groups, personality, etc. and how they interact in the organizational setting.
- The manager's characteristics in this context
Case: Zappa Construction Ltd.

FEDERAL BUSINESS DEVELOPMENT BANK

COMMUNICATION AND INTERPERSONAL RELATIONS (1977)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To increase administrators' and managers' interpersonal competence by means of improved communications skills.

INTENDED PARTICIPANTS

Administrators, supervisors and managers in any organization, with special emphasis on small business owner/managers.

COURSE MATERIALS

Texts, simulations and group exercises, references, Leader's Notes.

COURSE OUTLINE

- | | |
|----------|--|
| Module 1 | Introduction
- Course Outline and Introduction to the Experiential Approach
Exercises: Mutual Introduction
The Experiential Approach |
| Module 2 | Verbal and Non-Verbal Communication
- An Overview of the Communication Process
Exercises: One Way - Two Way
Reformulation (Listening) |
| Module 3 | Participation
- Definition, Dimensions, and Conditions Which Encourage and Inhibit Participation
Exercise: Participation Role Play |

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- Module 4 Leadership Training
 - Leadership Qualities, Influences and Styles
 Exercises: Personal Analysis of Leadership Styles
 What is an Effective Leader?
- Module 5 Task Group Problem-Solving
 - Factors That Promote Effective Task Groups
 - A Problem-Solving Technique
 Exercises: A Common Exercise (Group Network)
 Board of Directors (Problem-Solving)
- Module 6 Group Relationships and Conflicts
 - Types, Causes, Effects, and the Resolution of Conflicts
 Exercises: Identifying Sources of Group Tension
 Conflicts Among Groups
- Module 7 Creativity and Brainstorming
 - General Concepts, Stages and Choosing and Solution
 Exercises: Creativity
 Traffic Study
- Module 8 Negotiation - Role Play
 - Stages and Strategies
 Exercise: Negotiation Case/Role Play
- Module 9 The Individual
 - Review of Maslow's and McClelland's Theories
 Exercises: Determining Evaluation Criteria
 Perception of Work
- Module 10 Increasing Interpersonal Expertise
 - Motivation, Power, Leadership and Interpersonal
 Competence
 Exercise: Increasing the Leader's Competence

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- Module 4 Employee Working Conditions
- Importance of human resources, their complexities,
 and the type of working conditions needed to survive
 and prosper.
Case: Otto Pitt Inc. - Parts 2 and 3
- Module 5 Employee Safety and Health
- Costs of work accidents and illness, the responsibilities
 of government, employees and employers and the
 challenge employee health and safety imposes on the
 small and medium sized firm.
Case: Premont Works Ltd.
Exercises
- Module 6 Women at Work
- Review of the problems, trends of present legislation
 on employment and the impact of these factors.
Exercises
- Module 7 Consumer Protection
- Review of provincial and federal legislation, the small
 and medium sized firm's strengths and weaknesses and
 a review of the elements of a consumer protection
 policy.
Exercises
- Module 8 Protection of the Environment
- Review of the problems of environmental protection,
 the need to reduce pollution, what the firm's role
 should be and what social pressures may be exerted.
Case: Tile Dairy Ltd.
Exercises
- Module 9 Ethics
- The need for a code of ethics governing the firm's
 behaviour in society and the relationships to its
 social responsibility policies.
Case: Metallurge Inc.
Exercises
- Module 10 Defining and Implementing Social Responsibility
Policies in the Small and Medium Sized Firm
- The importance of setting policies, the difficulties
 and the tools to use.
Exercises

FEDERAL BUSINESS DEVELOPMENT BANK

BUSINESS POLICY (1977)

STATUS

Advanced level. Part of a current series.

OBJECTIVES

To increase the analytical and policy decision making skills of business managers and administrators.

INTENDED PARTICIPANTS

Administrators and managers of small and medium sized firms who already possess a good understanding of business operations and management.

COURSE MATERIALS

Texts, case studies, complementary reading references, and Leader's Notes.

COURSE OUTLINE

- Module 1 Strategy - A Conceptual Analysis Model
- Introduction to strategic planning with definitions
of key terms and development of a model.
Case: Laboratory of L.D.P. Wood Products
- Module 2 Identification of Objectives
- Definition and need for objectives, how they are
formulated and errors to avoid.
Case: The Robbins and Hobart Merger
- Module 3 Analysis of Internal Resources
- Review of the firm's internal resources with a
view for formulating a competitive advantage.
Case: Collinson Inc.

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- Module 4 External Environment I - Opportunities and Risks
- Definition and review of the difficulties and factors to be considered in dealing with the external environment.
Case: Limelight for Children Inc.
- Module 5 External Environment II - Environmental Research
- Generating ideas, sources for strategic information, processing and gathering information, and the difficulties involved.
Case: Notes on the Fashion Industry (1972)
Readings: "Bagatelle"
 "Manchester Children's Wear"
- Module 6 Formulation of Strategies (Alternatives)
- The strategy formation process and factors for evaluating and selecting alternatives.
Case: Belle Ltd.
Reading: "Wood Palette Provincial Industry"
- Module 7 Strategy Choice
- Criteria influencing the choice process, contingencies strategies, and influences of individuals on strategic choices.
Case: Agrivent Inc.
Reading: "The Quebec Industrial and Commercial Markets for Ventilation"
- Module 8 Strategy Implementation
- The relationships between organizational structure, strategy and implementation.
Case: Sabote
- Module 9 Revision and Control of Plans of Action
- A complete detailed review of the evaluation process.
Case: Heavy Duty Workshop Ltd.
- Module 10 Innovation
- Types of innovation, the innovation process, predominant factors, and strengths and weaknesses of innovation in certain areas of economic activity.
Case: Casual Miss: Product Square Dudes

FEDERAL BUSINESS DEVELOPMENT BANK

The Federal Business Development Bank assists in the establishment and development of small business enterprises in Canada by providing them with financial and management services.

To help improve management skills in small Canadian businesses, the bank conducts management training seminars, at a moderate registration fee, in cities and towns across Canada. These seminars are planned to meet the needs of owners and managers of small businesses. The bank also prepares special joint seminars in co-operation with industry associations and other organizations.

FBDB develops management training courses and distributes them to provincial and territorial education authorities for their use.

The FBDB also publishes booklets on a wide range of topics pertaining to the management of small business in Canada. It distributes a bulletin featuring business developments and at its branch offices it maintains reference libraries with a variety of publications on small management.

FEDERAL BUSINESS DEVELOPMENT BANK

MANAGEMENT BY OBJECTIVES AND RESULTS (1977)

STATUS

Advanced level. Part of a current series.

OBJECTIVES

To explain the basic elements of an MBO system and to show how it can be implemented in a small business.

INTENDED PARTICIPANTS

Owner/managers and key administrators in small and medium sized businesses; anyone with some management experience and background who is interested in MBO.

COURSE MATERIALS

Text, cases and exercises, Leader's Notes and (optional) video-cassettes.

COURSE OUTLINE

- Module 1 Introduction to MBO
 - The philosophy and process of MBO and the organization analysis that precedes implementing this system.
 Case: Saskind Clothing Ltd.
- Module 2 MBO as a System of Management
 - The systems concept and the seven phases of the MBO process.
 Case: An Over Efficient Employee.
- Module 3 The Determination and Formulation of Objectives
 - The hierarchy of objectives and what constitute good and bad objectives.
 Exercise: The Types of Objectives

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- Module 4 Formation, Selection and Implementation of Plans of Action
- Establishing and implementing plans of action.
Exercise: Completion of Tables and Forms
- Module 5 Management Styles
- Theories of motivation and different styles of managing (autocratic, democratic, participative, etc.).
Exercise: Questionnaire on Management Style and Philosophy
- Module 6 Methods and Strategies of Implementation
- Prerequisites to implementation of MBO and the steps involved.
Case: The Electronic Company Ltd.
- Module 7 Evaluation of Results and Performance
- Various evaluation approaches and how to use them.
Relationships between evaluation interview, remuneration, promotion and unions.
Role Play: Performance Evaluation Interview
- Module 8 Dynamic Aspects of MBO
Role Play: The clarification of tasks and negotiating objectives.
- Module 9 Implementing an MBO System
- An outline of the principle problems of implementation.
Exercise: Questionnaire on Strategy of Implementation
- Module 10 Perspectives and Summary
- Review of the elements - implementation steps, styles of management, the MBO process and its problems.
Case: The V.M.I. Company

FEDERAL BUSINESS DEVELOPMENT BANK

MANAGEMENT BY OBJECTIVES AND RESULTS CLASSROOM VIDEOCASSETTE SERIES (1978)

This series of 10 video-cassettes is designed to go hand in hand with the written course materials. The use of dramatizations, graphic presentations and interviews combine to show the MBO philosophy and how it can be applied to small and medium sized businesses. The video presentation for each module closely parallels the written materials and, as such, the series represents a useful instructional aid.

MODULE 1: INTRODUCTION TO MBO AND ANALYSIS OF ORGANIZATIONAL PROBLEMS (16 minutes)

- MBO as a philosophy of management and as a system of results: parallel drawn to a housewife shopping.
- The narrator illustrates the 7 steps of the MBO process by cooking an omelette.
- Graphic profile of the economic and management system.

MODULE 2: MBO AS A SYSTEM OF MANAGEMENT (14 minutes)

- Pictorial illustration of a sound system and a pay system to explain the systems concept and its components.
- Implementing MBO in a business and the 7 phases of the MBO process are discussed with the aid of graphics, slides, and cartoons.

MODULE 3: THE DETERMINATION AND FORMULATION OF OBJECTIVES (14 minutes)

- Illustrative analogy drawn to the department of justice and a hospital to explain the hierarchy of objectives.
- Graphics effectively utilized to discuss the characteristics and analysis of objectives and the process of determining objectives in the MBO context.

MODULE 4: PLANS OF ACTION (11 minutes)

- A situation, "Reaching the Top of a Mountain", is created to illustrate the process of establishing and implementing plans of action.

MODULE 5: MANAGEMENT STYLES (16 minutes)

- Graphics aid the narrator in examining the hierarchy of needs.
- Dramatization successfully establishes the characteristics of the 5 styles of management.

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MODULE 6: STRATEGIES FOR IMPLEMENTING AN MBO SYSTEM (17 minutes)

- The strategy and method of implementing an MBO system is discussed in an interview with a zone manager of Steinberg's Incorporated.

MODULE 7: EVALUATION OF RESULTS AND PERFORMANCE (12 minutes)

- Advantages, disadvantages and principles of various approaches to performance evaluation discussed by narrator.
- Arguments for performance evaluation in the spirit of MBO drawn with the aid of graphics and an interview with a spokesman from Steinberg's Incorporated.

MODULE 8: DYNAMICS OF MBO (18 minutes)

- Four retired businessmen draw from their personal experiences to discuss the principles and advantages of implementing an MBO system.

MODULE 9: IMPLEMENTING MBO IN A BUSINESS (17 minutes)

- Amusing anecdotes present the principle problems of implementing MBO.

MODULE 10: PERSPECTIVES AND SUMMARY (14 minutes)

- The narrator presents a concise review of the elements of an MBO system.

FEDERAL BUSINESS DEVELOPMENT BANK

HUMAN RESOURCES MANAGEMENT (1973)

STATUS

Advanced level.

OBJECTIVES

To provide the tools necessary to improve manpower utilization through teamwork.

INTENDED PARTICIPANTS

Owner/managers and key employees in any enterprise; wives of owner/managers; people thinking of starting a business.

COURSE MATERIALS

Texts, cases, supplementary readings and Leader's Notes. Note that this course is primarily case studies with selected background readings.

COURSE OUTLINE

Module 1

Overview

Case: Glencoe Manufacturing Company

Readings: Behavioural Science and Business -
The Changing Scene
The Price of Success

Module 2

Organization Planning

Cases: Volume Distributors Inc.

Hegner Meat-Packing Company

The Reliable H.R.W. Manufacturing Co. Ltd.

Reading: Understanding and Increasing Organizational
Effectiveness
Delegation in management

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- Module 3 Motivation
Cases: Tensor Electronics
 Sussex Oil Company
 Haver Industries, Inc. (A)
Readings: Employee Morale
 An Experiment in Management - Putting
 Theory Y to the Test
- Module 4 Selection of Personnel
Cases: Precision Machine Company (Role Playing)
 Frank's Service Station
 Cloverdale Restaurants Ltd.
Reading: Investment in People
- Module 5 Induction and Training
Cases: Work and the Worker - Meridan
 Arms Company
 Lanis Men's Store
- Module 6 Performance and Appraisal
Cases: Blake Processing Company
 Smith's Wholesale House
 Northstar Chemical Company
Reading: Management Functions - Theory X and Theory Y
- Module 7 Compensation
Cases: The Automotive Supply Parts Co.
 Reiker Machine Shop Inc.
Reading: Classification and Compensation Procedures
- Module 8 Industrial Relations
Cases: The Gerrard Mattress Company
 Ace Truck Repair Incorporated
Readings: Industrial Relations
 Glossary
- Module 9 Communication
Cases: Sealand Company
 Delta Design Inc.
Reading: Listening to People
- Module 10 Constructing an Effective Environment
Case: The Fisher Insurance Agency

FEDERAL BUSINESS DEVELOPMENT BANK

MANUFACTURING, PLANNING AND CONTROL (1972)

STATUS

Advanced level.

OBJECTIVES

To develop the production organization, to determine optimum plant capacity and long-term labour and equipment requirements, and to plan product lines.

INTENDED PARTICIPANTS

Owner/managers of wholesale and service operations of any type and size; management personnel in the manufacturing, engineering and contracting fields.

COURSE MATERIALS

Readings, case studies, Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Introduction
Case: Absolute Level Company |
| Module 2 | The Language and Tools of Production
Case: Laboratory Equipment Co. Ltd. |
| Module 3 | Methods and Time Study
Case: Mallory Paint Co. Ltd. |
| Module 4 | Wage Administration
Case: Sampson Sewer Tile Works |
| Module 5 | Plant Layout and Work Flow
Case: Mitchell Woodworking Co. |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 3 Motivation
Cases: Tensor Electronics
 Sussex Oil Company
 Haver Industries, Inc. (A)
Readings: Employee Morale
 An Experiment in Management - Putting
 Theory Y to the Test
- Module 4 Selection of Personnel
Cases: Precision Machine Company (Role Playing)
 Frank's Service Station
 Cloverdale Restaurants Ltd.
Reading: Investment in People
- Module 5 Induction and Training
Cases: Work and the Worker - Meridan
 Arms Company
 Lanis Men's Store
- Module 6 Performance and Appraisal
Cases: Blake Processing Company
 Smith's Wholesale House
 Northstar Chemical Company
Reading: Management Functions - Theory X and Theory Y
- Module 7 Compensation
Cases: The Automotive Supply Parts Co.
 Reiker Machine Shop Inc.
Reading: Classification and Compensation Procedures
- Module 8 Industrial Relations
Cases: The Gerrard Mattress Company
 Ace Truck Repair Incorporated
Readings: Industrial Relations
 Glossary
- Module 9 Communication
Cases: Sealand Company
 Delta Design Inc.
Reading: Listening to People
- Module 10 Constructing an Effective Environment
Case: The Fisher Insurance Agency

FEDERAL BUSINESS DEVELOPMENT BANK

MANUFACTURING, PLANNING AND CONTROL (1972)

STATUS

Advanced level.

OBJECTIVES

To develop the production organization, to determine optimum plant capacity and long-term labour and equipment requirements, and to plan product lines.

INTENDED PARTICIPANTS

Owner/managers of wholesale and service operations of any type and size; management personnel in the manufacturing, engineering and contracting fields.

COURSE MATERIALS

Readings, case studies, Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Introduction
Case: Absolute Level Company |
| Module 2 | The Language and Tools of Production
Case: Laboratory Equipment Co. Ltd. |
| Module 3 | Methods and Time Study
Case: Mallory Paint Co. Ltd. |
| Module 4 | Wage Administration
Case: Sampson Sewer Tile Works |
| Module 5 | Plant Layout and Work Flow
Case: Mitchell Woodworking Co. |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 6 Production Control - Scheduling
Case: Coronation Manufacturing

- Module 7 Production Control - Inventory Control - Stores Control
Case: McArthur Mirror Company Ltd.

- Module 8 Production Control - Inventory Control - Size of
Production Run
Case: Tuxford Electronics Inc.

- Module 9 Production Control - Cost Control
Case: Grover Screw Machine Products

- Module 10 Production Planning and Control - Summary
Case: Juno Company

FEDERAL BUSINESS DEVELOPMENT BANK

COST ACCOUNTING - MANUFACTURING (1967)

STATUS

Advanced level.

OBJECTIVES

To explain the basic underlying principles, to define the terminology used and to stress the advantages of Cost Accounting.

INTENDED PARTICIPANTS

Owners, managers or bookkeepers of manufacturing businesses who already have a basic knowledge of the accounting process (double entry system).

COURSE MATERIALS

Readings, case studies, problems and Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Introduction to Cost Accounting
Case: Playtime Limited |
| Module 2 | Job Order Costs
Case: Meyers Manufacturing Company |
| Module 3 | Analysis of Variances
Case: Continental Furniture Company |
| Module 4 | Inventory Control and Valuation
Case: Metal Manufacturing Company |
| Module 5 | Process Costing, Joint Products and By Products
Case: Process Chemicals Ltd. (A) |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 6 Differential Costing
 Case: Process Chemicals Ltd. (B)

- Module 7 Break-Even Analysis
 Case: Custom Fabricators Ltd. (A)

- Module 8 Cost - Price - Volume Relationships
 Case: Custom Fabricators Ltd. (B)

- Module 9 Standard Costs
 Case: Grand Manufacturers Ltd.

- Module 10 Costs as an Aid to Budgeting
 Case: Garden Hose Ltd.

FEDERAL BUSINESS DEVELOPMENT BANK

MARKETING FOR SMALL BUSINESS (1978)

STATUS

Introductory level. Part of a current series. Available in modular format.

OBJECTIVES

To give owner/managers a basic overview of marketing and how it related to everyday business operations.

INTENDED PARTICIPANTS

Anyone working with (or interested in) marketing, with special emphasis on small business owner/managers.

COURSE MATERIALS

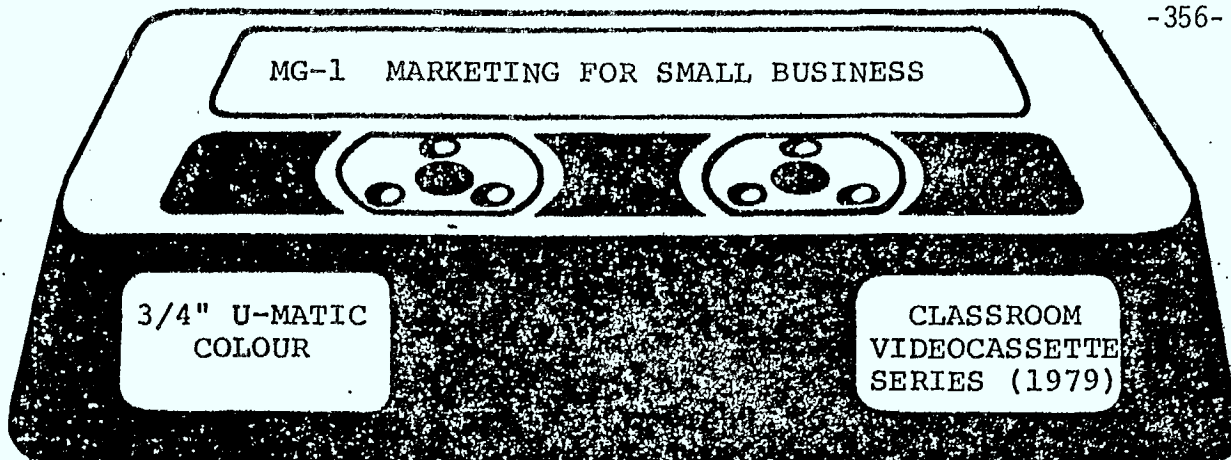
Texts, case studies, glossary of terms and Leader's Notes.

COURSE OUTLINE

- Module 1 What is Marketing
- Definition, marketing management concept, systems approach, external and internal variables, and the role of management
Reading: How to Analyze a Case Study
Case: Jeff Silverman
- Module 2 Marketing Research
- The nature of marketing research, primary and secondary data, and six steps in conducting marketing research
Case: Northern Water Softeners.
- Module 3 Developing Market Profiles
- Why develop a market profile? Market segmentation, target markets, product differentiation, and developing a marketing strategy
Case: Bruce Prentice

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Consumer Behaviour
- Where, what, and why do people buy?
- Factors influencing consumer decisions
Case: Dempster's Bike Shop
- Module 5 Product/Service Mix
- The total product concept, product classifications,
 product image, branding, the importance of packaging,
 product planning concepts, and the product life cycle
Case: Fareway Enterprises
- Module 6 The Price/Value Mix
- Price as a function of value and cost, mark-up pricing,
 demand based pricing, and pricing policies
Case: Wyzinski Construction
- Module 7 Promotion/Advertising
- The four elements of promotion, advertising and
 promotion objectives, how consumers buy, planning an
 ad campaign, determining a promotion budget, and
 where to spend your money.
Case: Target Cigarettes
- Module 8 Transportation/Channel Mix
- Channel choices and selection and the importance of
 physical distribution
Case: Canadianna Jeweller
- Module 9 Retailing
- Classification of retailers and retailing trends
Case: Golden Horseshoe Cannery Assoc.
- Module 10 The Marketing Environment
- Factors which influence the marketing mix, the role
 of government, and consumerism
- Glossary of Marketing Terms
- Case: Thermo-Wash



This series of ten videocassettes supports the written material by providing real life case studies that highlight the theme of each module. A variety of different businesses from across Canada were filmed and interviewed on-site. The shows thus provide a "taste of reality" in the classroom and can be used most effectively to introduce each class and to generate discussion relating the business portrayed to the theme of the module.

MODULE 1: WHAT IS MARKETING?
(19:30 minutes)

Peter and Morris Taylor, co-owners of "P.J.'s Audio Master", a mini-chain of five audio stores located in Ontario, tell us about their marketing strategy and demonstrate how the marketing concept applies to their business.

MODULE 2: MARKETING RESEARCH
(10:25 minutes)

Jack and Constance Cox of "Constance Cox Designs" (Montreal, Quebec) explain the market research they conducted before deciding to manufacture and retail brass beds.

MODULE 3: DEVELOPING MARKET PROFILES
(15:15 minutes)

Bill Greenwood, owner of "Greenwood Realities" (Halifax, Nova Scotia) concentrates on high-priced residential properties. We see how developing a market profile has helped this business succeed.

"Southwell Controls Ltd." (Vancouver, B.C.) also uses market segmentation to insure success. Les Southwell, President, explains how his company evolved from a manufacturers representative to a manufacturer of logic systems and flow meters for Canadian industry.

MODULE 4: CONSUMER BEHAVIOUR
(16:55 minutes)

Dick McDonald and his brother Doug own "The Broken Cue", a chain of family snooker centers operating in the Maritime provinces. Dick compares their snooker centers with the old-style pool rooms and explains how their operation is more in line with what today's consumer is looking for.

MODULE 5: PRODUCT/SERVICE MIX
(19:30 minutes)

"The General Store" (Toronto, Ont.) is owned and operated by Dorothy Ames and Dianna Kearns. Originally a gift store, The General Store evolved an effective product/service mix that is based on personalized service and careful attention to new ideas. They started designing and manufacturing bathrobes and then got into interior design services.

MODULE 6: PRICE/VALUE MIX
(14:05 minutes)

"Connie Barber Knit Fabrics" is located in North Vancouver, B.C. The owner, Connie Barber, tells us how prices are determined in her field of business and outlines how she came to adopt the pricing strategies that she uses today.

MODULE 7: PROMOTION/ADVERTISING MIX
(16:50 minutes)

"Sampson's Enterprises" (Winnipeg, Manitoba) runs three related operations: a marina, a recreational vehicles division and a retail sporting goods store. Glen Sampson demonstrates his promotion and advertising methods and explains why he is a heavy user of radio, newspaper and direct mail advertising.

MODULE 8: TRANSPORTATION/CHANNEL MIX
(14:15 minutes)

Gary Gogel is President of "Progressive Products Ltd." (Coquitlam, B.C.). The company distributes "built-in" home products such as vacuum systems, music-intercom systems and fire and burglar alarms. Mr. Gogel outlines the importance of the distributor in his marketing system.

MODULE 9: RETAILING
(12:55 minutes)

Four stores on the so-called 17th Avenue South/West strip (Calgary, Alberta) are visited and the owners discuss the advantages of their locations. This grouping together of specialized stores and boutiques aiming for a particular target market is explored as one of the future trends in retailing.

MODULE 10: THE MARKETING ENVIRONMENT
(16:00 minutes)

"Nautical Electronics Ltd." in Hackett's Cove, Nova Scotia, is a manufacturer of non-directional beacons used in airports the world over. As a company involved in exporting highly specialized products to many countries, they have had to fully understand many different marketing environments in order to succeed. The lessons of this example can be readily applied to any business.

FEDERAL BUSINESS DEVELOPMENT BANK

FORECASTING: PREDICT YOUR SALES AND PROFITS (1979)

STATUS

Intermediate level. Part of current series.

OBJECTIVES

To give owner/managers a basic understanding of the importance, concepts, and usefulness of forecasting.

INTENDED PARTICIPANTS

Anyone interested in learning how to forecast. Previous experience in forecasting is not required but participants should have a basic understanding of financial statements and marketing. By presenting a judgemental approach to forecasting (vs. mathematical formulas) the course minimizes the use of complicated calculations. Participants should, however, feel comfortable performing a lot of basic calculations. A business calculator is required for this purpose.

COURSE MATERIALS

Text, cases or exercises, readings, course evaluation and Leader's Notes.

COURSE OUTLINE

- Module 1 "What is Forecasting?"
- Definition
 - Marketing forecasts vs. other types
 - The future, probability, and risk
- Case: Hotfoot's Hothouse (A)
-
- Module 2 "Am I Asking the Right Questions?"
- The forecast/corporate planning relationship
 - Demand, product, characteristics, and elasticity of demand
- Reading: "Forecasting Demand and Estimating Market Size"
- Case: Parrall Ltd.

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 3 Evaluating the Business Climate
- The importance of complete information
 - Relationships between the economy, industry, consumer behaviour, etc.
 - Sources of information
- Reading: INFOMAT Weekly Bulletin
Case: Hotfoot's Hothouse (B)
- Module 4 What Facts Should You Base Your Forecast On?
- Selecting relevant historical data and organizing the facts
 - Exchange rates and unusual occurrences
- Case: Tyro Photo Supply Ltd. (A)
- Module 5 Using the Information You Have Gathered
- Adjusting financial statement figures
 - Choosing and using deflators
- Case: Tyro Photo Supply Ltd. (B)
- Module 6 Developing the Forecast
- Graphing adjusted sales, gross profit and net income information helps forecasters analyze trends
 - Derivation and usefulness of trend lines
 - Judgemental projection of sales, gross profit and net income
- Case: Tyro Photo Supply Ltd. (C)
- Module 7 Details of Forecasting Development
- Decomposition of forecast figures by month, season and product line
 - Limitations of forecast figures
- Case: Tyro Photo Supply Ltd. (D)
- Module 8 Interpreting the Forecast - Should Policies be Changed?
- Interpreting changes in sales, gross profit and net income
 - Financial ratios and their usefulness
 - Should changes be made?
- Case: Tyro Photo Supply Ltd. (E)
- Module 9 Putting Your Forecast to Work
- Directions that policy changes can take
 - Conditions under which each strategy is usually effective and criteria for selection
 - Implementing policy changes and monitoring progress
- Exercise: Tyro Photo Supply Ltd. (F)
- Module 10 Forecasting In a Nutshell
- Summary of the forecasting process
- Case: Conkless Calculator Co.

FEDERAL BUSINESS DEVELOPMENT BANK

MARKETING YOUR PRODUCT (1979)

STATUS

Intermediate level. Part of a current series.

OBJECTIVES

To outline ways of making - or improving - a firm's product offering. By exploring basic product marketing concepts and relating them to small business, this course will help participants better meet consumer needs. This often results in increased sales and profits.

INTENDED PARTICIPANTS

Anyone interested in improving their ability to successfully market a product. It is important to note that this course is relevant to all firms (retail, service or manufacturing) in that they all offer a product to consumers. This course outlines ways in which the product offering can be made - or improved. Before taking this course, participants should have a basic understanding of marketing at the introductory level such as "Marketing for Small Business".

COURSE MATERIALS

Text, cases and/or exercises, readings and Leader's Notes.

COURSE OUTLINE

- Module 1 What, How and Why Customers Buy
- The marketing concept, what is a product?
 - Industrial vs. individual buyers
 - Purchasing as a decision process, understanding consumer needs and influencing purchase decisions.
- Exercises
-
- Module 2 Developing a Market Strategy
- Segmented vs. non-segmented approaches; ways to segment a market
 - Getting information and selection of a target market
 - The marketing mix
- Exercise
- Case: The Shirt Store

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 3 Forecasting Product Sales
- Evaluating the business climate, general economic conditions and your industry?
 - Obtaining and screening information
 - The forecast predicts the important events that will probably happen
 - Asking the right questions and developing a forecast
- Reading: "How a Retailer Can Profit From Facts"
Case: Futura Industries, Inc.
- Module 4 Choosing and Developing Your Product
- What is your product?
 - Constraints, selecting and testing products, product adoption curves and other decision criteria
- Case: Mr. Tenderflake Bakery Inc.
- Module 5 Developing Effective Brand Images
- Brand configurations and adopting the right policy
 - Some implications of brand policy
 - What constitutes a good brand name?
- Exercise
Case: Norge Canada, Ltd.
- Module 6 Product Management
- Good product management improves market share
 - Packaging - size and colour, shelf life and quality, the law
 - Making improvements
- Case: United Breweries Ltd.
- Module 7 Effective Distribution is a must!
- Middlemen and choosing distribution channel(s)
 - The physical movement of goods
- Case: Norge, Canada Ltd. Faces a Distribution Problem
- Module 8 Promoting Your Product
- Promotion as a group of related activities, not just a gimmick
 - Choosing a promotional strategy and using promotion tools
 - Promotion as communication
- Reading: "Promotion - The Problem-Solver"
Case: Burncraft Cycle Ltd.
- Module 9 Pricing Can Be an Important Marketing Tool
- Factors to consider, including internal constraints, product attributes and the nature of an effective pricing policy
 - Pricing decisions in today's business environment
- Reading: "Retail Pricing"
Case: Norge, Canada Ltd. Faces a Pricing Problem

FEDERAL BUSINESS DEVELOPMENT BANK

Module 10

Price vs. Production Costs - Profit and Loss?

- Specific pricing methods, including cost plus mark-up, return on investment, break-even analysis and marginal analysis

- Reading: "Marginal Cost Pricing Helps Maximize Profits"

Case^ Norge, Canada Ltd. Prices a New Product

FEDERAL BUSINESS DEVELOPMENT BANK

MARKETING MANAGEMENT FOR THE MIDDLEMAN (1973)

STATUS

Intermediate level.

OBJECTIVES

To equip owner/managers of distribution businesses with the basic concepts and tools needed to identify and solve problems in today's dynamic marketplace.

INTENDED PARTICIPANTS

Anyone interested or working in distribution, especially wholesalers, brokers and managers or cooperative associations.

COURSE MATERIALS

Selected articles, case studies, bibliography, Leader's Notes.

COURSE OUTLINE

- Module 1 Introduction: Wholesaling and the Distribution System
Articles
- The Wholesaling Sector in Canada
- Developing a Distributive System
- Module 2 The Customer: A Marketing Orientation
Cases: Western Pipe Products
 Mark Filings Co. (A)
 Sutherland Farm
- Articles
- What is Marketing Today?
- Marketing Strategy Within the Marketing Plan
- Emerging Patterns of Distribution: A Marketing Orientation
- Manufacturers' Agent - Adaptation or Atrophy
- Module 3 The Product-Service Mix

FEDERAL BUSINESS DEVELOPMENT BANK

Module 3

The Product-Service Mix

Cases: Tronics Ltd. (A)
Mark Filings Co. (B)
Myles, Marshall & Sons Ltd.
Alpha Motors Ltd.
Winnipeg Music House

Articles

- Wholesale Buying and Merchandising
- Survival Through Differentiation
- How to Decide Which Product to Junk
- Buying Sales and Established Accounts

Module 4

Pricing and Grouping for Profit

Cases: Mark Filings Co. (C)
Restivo Fruit & Vegetable Co. Ltd.
George Riley

Articles

- Pricing a New Product
- The Importance of Cost in Pricing
- Marketing and the Combines Investigation Act
- The Combines Investigation Act - Offences in Relation to Trade
- How Trade Associations Help Small Business

Module 5

Sales and Distribution Analysis

Cases: Tronics Ltd. (B)
Tronics Ltd. (C)
Malcolm McNair
White Brother (A)

Articles

- Analyzing Your Cost of Marketing
- How to Design Sales Territories
- Three-Step Method to Better Distribution Channel Analysis
- The Channel Audit

Module 6

Advertising and Personal Selling

Cases: Airflo Co.
The Johnson Co.
John Crissy
Blair Williams Agency
White Brothers (B)
Fred Gamble Co.

Articles

- I.P.S.O. in Industrial Advertising
- The Salesman's Role Revisited
- What Makes a Good Salesman
- The Management Job of the District Manager
- Easy to Make Flip Charts Provide Selling Tools

FEDERAL BUSINESS DEVELOPMENT BANK

Module 7

The Distributor-Supplier Relationship

Cases: Rasco Ltd.
Gordon Revzan
Cotton Mather

Articles

- Pricing to Gain Wholesalers' Selling Support
- Ten Commandments of Good Communication
- How Can You Find "Qualified" Manufacturers' Representatives

A Selected Bibliography

FEDERAL BUSINESS DEVELOPMENT BANK

PRACTICAL DECISION-MAKING IN MARKETING (1973)

STATUS

Intermediate level.

OBJECTIVES

To explore the marketing function and its relation to the firm's overall activities with a view to maximizing the firm's resources.

INTENDED PARTICIPANTS

Anyone interested in a basic understanding of marketing with special emphasis on small business owner/managers.

COURSE MATERIALS

Case studies, readings, Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | The Marketing Function in Organization Structure
Cases: Salvo Paint and Varnish Co. Ltd.
Colburn Pharmacy (A)
Quick Laundry and Dry Cleaning Co. |
| Module 2 | Identifying Market Segments
Cases: Lavoisier Children's Products Ltd.
Colburn's Pharmacy (B)
Noble Real Estate |
| Module 3 | Customer Behaviour
Cases: Goddard Electronic Laboratory Ltd.
McLean Furnishings Ltd. (A)
The Brass Bannister |
| Module 4 | Marketing Research
Cases: James Electronics
Johnston Hardware
Beef 'N' Bun Ltd. |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 5 The Product-Service Mix
Cases: Playtime Camper Co.
 Battery Radio and T.V.
 The Byrd Nest
- Module 6 Pricing the Product or Service
Cases: Canadian Pines Reproductions Ltd.
 Marylou Gifts
 Calgary Upholstery
- Module 7 Mass Selling
Cases: Acme Abrasives Ltd.
 Valleyhill Farm Groceteria (A)
 Aaron Catering Service
- Module 8 Distribution Channel Relationships
Cases: Aunt Maude's Pride
 Valleyhill Farm Groceteria (B)
 Cleanit Ltd.
- Module 9 Environmental Issues and Social Change
Cases: Jamaican Bakery
 Montgomery Books
 The Golden Tones
- Module 10 The Use of Marketing Consultants
Cases: Quality Mattress Manufacturing Co.
 Andrea's Haute Couture
 Dykes Studios Ltd.
- Module 11 Planning for Marketing Success
Cases: Aluminum Products Ltd.
 McLean Furnishings Ltd. (B)
 Central Kosher Delicatessen

FEDERAL BUSINESS DEVELOPMENT BANK

RETAILING: AN INTRODUCTION (1978)

STATUS

Introductory level. Part of a current series. Available in modular format.

OBJECTIVES

To initiate beginners to many aspects of retailing and to help experienced merchants questions, and perhaps review, some of their management methods.

INTENDED PARTICIPANTS

Owner/managers of small and medium sized retail businesses; all staff with retailing responsibilities in any type of manufacturing or distribution business. People starting a retail business.

COURSE MATERIALS

Case studies or exercises, student text and Leader's Notes.

COURSE OUTLINE

- Module 1 Retailing and Financial Statements
- Preparation of a balance sheet
 - Preparation of a profit and loss statement
- Case: Haberdasher Counter Ltd.
-
- Module 2 Basic Accounting
- Analysis of debit and credit transactions
 - Recording of transactions in a journal
 - Recording of transactions in a general ledger
 - Preparation of a balance sheet and a profit and loss statement
- Case: Capharneau Boutique

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 5 The Product-Service Mix
Cases: Playtime Camper Co.
 Battery Radio and T.V.
 The Byrd Nest
- Module 6 Pricing the Product or Service
Cases: Canadian Pines Reproductions Ltd.
 Marylou Gifts
 Calgary Upholstery
- Module 7 Mass Selling
Cases: Acme Abrasives Ltd.
 Valleyhill Farm Groceteria (A)
 Aaron Catering Service
- Module 8 Distribution Channel Relationships
Cases: Aunt Maude's Pride
 Valleyhill Farm Groceteria (B)
 Cleanit Ltd.
- Module 9 Environmental Issues and Social Change
Cases: Jamaican Bakery
 Montgomery Books
 The Golden Tones
- Module 10 The Use of Marketing Consultants
Cases: Quality Mattress Manufacturing Co.
 Andrea's Haute Couture
 Dykes Studios Ltd.
- Module 11 Planning for Marketing Success
Cases: Aluminum Products Ltd.
 McLean Furnishings Ltd. (B)
 Central Kosher Delicatessen

FEDERAL BUSINESS DEVELOPMENT BANK

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Owner/managers of small and medium sized retail businesses; all staff with retailing responsibilities in any type of manufacturing or distribution business. People starting a retail business.

COURSE MATERIALS

Case studies or exercises, student text and Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Retailing and Financial Statements
- Preparation of a balance sheet
- Preparation of a profit and loss statement
Case: Haberdasher Counter Ltd. |
| Module 2 | Basic Accounting
- Analysis of debit and credit transactions
- Recording of transactions in a journal
- Recording of transactions in a general ledger
- Preparation of a balance sheet and a profit and loss statement
Case: Capharneau Boutique |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 3 Buying: What and Where?
- Allocation of purchases
Case: Mr. Francis' Store
- Module 4 Terms of Sale and Pricing
- Establishing merchandise cost
- Establishing a selling price
Case: Disco-O-Sound Ltd.
- Module 5 Management, Planning and Controls
- Preparation of a budget
Case: Teevee Store
- Module 6 Financial Analysis
- Analysis of profit and loss statements
- Calculation of ratios
- Analysis of long-term position of balance sheet
Case: The Haberdasher Counter Ltd.
- Module 7 Location
- Establishment and analysis of criteria affecting
store location
Case: Smallstore's Groceteria
- Module 8 Promotion
- Analysis of a promotional campaign
Case: "Beauty" Cosmetic Products
- Module 9 Personnel Selection
- Creation of job descriptions
- Selection of personnel
- Recruitment of personnel
Case: World Wide Travel Agency Ltd.
- Module 10 Personnel Training and Remuneration
- Motivation of personnel
Case: World Wide Travel Agency Ltd.

FEDERAL BUSINESS DEVELOPMENT BANK

RETAIL SELLING (1966)

STATUS

Introductory level.

OBJECTIVES

The purpose of the course is to help beginners and experienced merchants in many aspects of retail selling.

The course will develop in participants an understanding of the importance of the different phases in the retail selling process starting from the sales presentation to closing the sale.

INTENDED PARTICIPANTS

Owner/managers of small and medium sized retail businesses; all staff with sales responsibilities. People starting a retail business.

COURSE MATERIALS

Case studies, student text and Leader's Notes.

COURSE OUTLINE

- | | |
|----------|---|
| Module 1 | Retail Selling is "Different"
- What is selling?
- Retail selling is direct selling
Case: Ned Graham |
| Module 2 | Consumer Behaviour
- Why do people buy?
- You have to satisfy customer's needs
Case: Paul Mead |
| Module 3 | Selling Situations
- Plan your sale
- Here is Mr. Customer
Case: Mrs. Helen Green |

FEDERAL BUSINESS DEVELOPMENT BANK

- Module 4 Knowing Your Product Lines
- Know your product
- Product benefit analysis
Case: John Hunt
- Module 5 Sales Presentation
- Tell the customer what he wants to hear
- Be prepared
Case: Mary Austen
- Module 6 Overcoming the Customer's Objection
- Why do people object?
- How to overcome objections
Case: Oxford Shop
- Module 7 Closing the Sale
- How to close the sale
- Why salesmen fail to close
Case: Jack Hall
- Module 8 Repeat and Suggestion Selling
- Suggestion, not substitution
- Building up a repeat clientele
Case: Oxford Shop
- Module 9 Selling Attitudes
- Are you a pro?
- Do you look like a pro?
Case: The Oxford Shop "A"
- Module 10 Summary and Review
Case: A Pair of Shoes
 Buying a Life Raft

SUPERVISORY SERIES (SV)
SV - TRAINING MODULES FOR FIRST LINE SUPERVISORS (1978)

IN MODULAR FORMAT
INDIVIDUAL BOOKLETS

STATUS

Current series. In modular format with each Participant's Guide and Leader's Guide as a separate booklet. This series of 72 modules was produced in Ontario by O.M.D.P. and is distributed by F.B.D.B.

OBJECTIVES

To provide all the basic background required for effective performance in a first line supervisory position.

INTENDED PARTICIPANTS

First line supervisors in any organization and those aspiring to supervisory responsibilities. Also useful for the owner/manager who wants more training in supervisory skills.

COURSE MATERIALS

There are 72 modules, with each Participant's Guide and each Leader's Guide in a separate booklet (1 suggested grouping of these modules by topic is also attached).

COURSE OUTLINE

MODULE:

- SV-1 Role of the Supervisor
- SV-2 Management Process: An Introduction
- SV-3 Managing Physical Resources
- SV-4 Improving Productivity
- SV-5 Productivity and Work Simplification I
- SV-6 Productivity and Work Simplification II
- SV-7 Productivity and Work Simplification III
- SV-8 Productivity and Work Simplification IV
- SV-9 Time Management
- SV-10 Strategies for Effective Time Management
- SV-11 Cost Accounting: The Cost Accountant - Friend or
Foe?
- SV-12 Introduction to Budgeting
- SV-13 Safety: Instruction
- SV-14 Safety: Housekeeping
- SV-15 Safety: Accident Prevention and Wearing Protec-
tive Equipment

SV-16	Safety: Accident Investigation and Reporting
SV-17	Decision-Making Techniques
SV-18	Techniques for Making Decisions and Solving Problems I
SV-19	Techniques for Making Decisions and Solving Problems II
SV-20	Managing the Workload: The Management Process
SV-21	Managing the Workload: Setting Goals
SV-22	Managing the Workload: Planning
SV-23	Managing the Workload: Organizing and Leading
SV-24	Managing the Workload: Coordinating and Controlling
SV-25	Allocating Human Resources
SV-26	Scheduling Staff
SV-27	Delegation
SV-28	Delegating Your Work
SV-29	Meeting Management
SV-30	Non Verbal Communication and Perception of Others
SV-31	Interviewing: An Introduction
SV-32	Developing Communication Skills: The Communication Process
SV-33	Developing Communication Skills: Listening
SV-34	Developing Communication Skills: One Way/Two Way Communication
SV-35	Developing Communication Skills: Run a Better Meeting
SV-36	Developing Communication Skills: Report Writing
SV-37	Developing Communication Skills: Memo and Letter Writing
SV-38	Reading More Efficiently
SV-39	Selection of Staff
SV-40	Staff Selection
SV-41	Staff Selection: The Screening Process
SV-42	Training and Instructing Employees
SV-43	Training
SV-44	Training in Job Skills
SV-45	Exit Interviews
SV-46	Performance Appraisal
SV-47	Setting Standards and Performance Evaluation
SV-48	Appraising Employee Performance
SV-49	Understanding People at Work
SV-50	Motivating Employees
SV-51	Motivation Through Achievement
SV-52	Developing and Maintaining Morale
SV-53	Styles of Handling Conflict
SV-54	Job Enrichment
SV-55	Leadership Styles
SV-56	Leadership Characteristics
SV-57	Team Building I
SV-58	Team Building II
SV-59	Team Building: Organization Design
SV-60	Counselling Employees
SV-61	Discipline: An Introduction
SV-62	Labour Relations: An Introduction
SV-63	Labour Relations: The Collective Agreement

SV-64 Labour Relations: Administration of the Collec-
tive Agreement

SV-65 Labour Relations: Recognizing the Causes and
Prevention of Grievances

SV-66 Labour Relations: The Grievance and Arbitration
Procedure

SV-67 Labour Relations: Employee Problems

SV-68 Labour Relations: Discipline

SV-69 Labour Relations: Legal and Illegal Activities

SV-70 Labour Relations: Government Requirements (Lea-
der's Guide only)

SV-71 Labour Relations: Preventative Labour Relations

SV-72 Women as Supervisors and Supervising Women

SUPERVISORY SERIES (SV)
TRAINING MODULES FOR FIRST LINE SUPERVISORS
SUGGESTED GROUPING OF MODULES BY TOPIC

MODULES

INTRODUCTION TO MANAGING

SV-1 Role of the Supervisor
SV-2 Management Process: An Introduction

IMPROVING PRODUCTIVITY

SV-3 Managing Physical Resources
SV-4 Improving Productivity
SV-5 Productivity and Work Simplification I
SV-6 Productivity and Work Simplification II
SV-7 Productivity and Work Simplification III
SV-8 Productivity and Work Simplification IV
SV-54 Job Enrichment

BUDGETS

SV-11 Cost Accounting: The Cost Accountant - Friend or
Foe?
SV-12 Introduction to Budgeting

MANAGING THE WORKLOAD

SV-9 Time Management
SV-10 Strategies for Effective Time Management
SV-20 Managing the Workload: The Management Process
SV-21 Managing the Workload: Setting Goals
SV-22 Managing the Workload: Planning
SV-23 Managing the Workload: Organizing and Leading
SV-24 Managing the Workload: Coordinating and Control-
ling
SV-25 Allocating Human Resources
SV-26 Scheduling Staff
SV-27 Delegation

DECISION-MAKING AND PROBLEM SOLVING

SV-17 Decision-Making Techniques
SV-18 Techniques for Making Decisions and Solving Prob-
lems I
SV-19 Techniques for Making Decisions and Solving Prob-
lems II

LEADERSHIP

SV-55 Leadership Styles
SV-56 Leadership Characteristics
SV-53 Styles of Handling Conflict
SV-72 Women as Supervisors and Supervising Women
SV-57 Team Building I
SV-58 Team Building II

MODULES

MOTIVATION

SV-49 Understanding People at Work
SV-50 Motivating Employees
SV-51 Motivation Through Achievement
SV-52 Developing and Maintaining Morale

PERFORMANCE APPRAISAL

SV-46 Performance Appraisal
SV-47 Setting Standards and Performance Evaluation
SV-48 Appraising Employee Performance
SV-60 Counselling Employees
SV-61 Discipline: An Introduction

THE STAFFING FUNCTION

SV-31 Interviewing: An Introduction
SV-39 Selection of Staff
SV-40 Staff Selection
SV-41 Staff Selection: The Screening Process
SV-45 Exit Interviews

THE TRAINING FUNCTION

SV-42 Training and Instructing Employees
SV-43 Training
SV-44 Training in Job Skills

LABOUR RELATIONS

SV-62 Labour Relations: An Introduction
SV-63 Labour Relations: The Collective Agreement
SV-64 Labour Relations: Administration of the Collective Agreement
SV-65 Labour Relations: Recognizing the Causes and Prevention of Grievances
SV-66 Labour Relations: The Grievance and Arbitration Procedure
SV-67 Labour Relations: Employee Problems
SV-68 Labour Relations: Discipline
SV-69 Labour Relations: Legal and Illegal Activities
SV-70 Labour Relations: Government Requirements
SV-71 Labour Relations: Preventative Labour Relations

SAFETY

SV-13 Safety: Instruction
SV-14 Safety: Housekeeping
SV-15 Safety: Accident Prevention and Wearing Protective Equipment
SV-16 Safety: Accident Investigation and Reporting

COMMUNICATION SKILLS

SV-17 Developing Communication Skills: The Communication Process

MODULES

SV-33 Developing Communication Skills: Listening
SV-34 Developing Communication Skills: One Way/Two Way
Communication
SV-35 Developing Communication Skills: Run a Better
Meeting

THE WRITTEN WORD

SV-36 Developing Communication Skills: Report Writing
SV-37 Developing Communication Skills: Memo and Letter
Writing
SV-38 Reading More Efficiently

PERSONAL DEVELOPMENT

SV-29 Meeting Management
SV-30 Non Verbal Communication and Perception of Others

Services to Manufacturing Business Branch (SMBB)

With a view to improving administrative organization in SMEs in order to increase growth and productivity and enhance continuity, SMBB is offering four management seminars for directors of manufacturing businesses. These are one-day seminars led by specialists in the subject.

For more information, please contact the Department of Industry and Commerce representative in your region.

DESCRIPTIONS OF THE SEMINARS

Production Management

Objective: This seminar is led by production management specialists.
Participants will:

- gain a comprehensive view and a better understanding of the integration of various production management tools;
- through lectures and discussions, analyse their own businesses and be encouraged to undertake a program of improvements;
- meet other business directors who face similar problems on a daily basis.

Topics: Choosing the site for a plant, installing the plant, cost estimates, stock management, planning, control, quality control, standardization.

The program will deal with three main types of production: batch, series, and sub-contracting.

DESCRIPTION OF SEMINARS (continued)

MARKETING

Objective: This seminar is led by marketing experts who have experience with small and medium enterprises. Participants will:

- take part in exchanges with other directors of manufacturing enterprises and try to find solutions to shared problems;
- gain a comprehensive view of marketing;
- analyse their own business and their own marketing policy.

Topics: Elements of marketing, market studies, products, prices, industrial sales, advertising, promotion, distribution.

Human Resource Management

Objective: This seminar is lead by experts in labour relations and human resource management. Participants will have a chance to:

- increase their knowledge in the area of union-management relations;
- improve their human resource management style.

Topics: Labour law and legislation on the workplace; the negotiation procedure; administration of a collective agreement and settlement of grievances; employer/employee relations and communication in the enterprise; employees' motivation and satisfaction at work; concepts of authority, power, and delegation; employee performance evaluation.

DESCRIPTIONS OF SEMINARS (continued)

Financial management

Objective: This seminar will enable participants to increase their knowledge of financial management and will lead to better financial management in their business.

Topics: Management accounting; direct-cost method; setting sales prices; determining the break-even point; financial analysis; calculating possible savings when modernizing equipment; planning; budgets and budgetary control.

NEWFOUNDLAND INSTITUTE FOR MANAGEMENT ADVANCEMENT AND TRAINING

NIMAT's main objective is to develop managers and increase the level of management skills in Newfoundland. Its activities include initiating, developing, and co-ordinating a wide variety of training programs that are prepared and delivered by resource people from business, government, academic, and trade institutions within the Province.

NIMAT's programs for Small Businessmen include Management Conferences; Seminars; various short-term courses (such as Business Opportunities, Retail Sales Management); and the DACUM Program.

The DACUM Program is of great significance to NIMAT as it has been its major undertaking in the field of small Business Education. It is a multi-media package in small business operations and management prepared by professionals in the major areas of business training. Each area is subdivided into a number of independent modules, and the businessman or woman can select any part of the 102 - module program that is of interest and study the tapes and printed material at his or her own speed. A user can, for example, select individual modules in the Basic Bookkeeping section such as Accounting Procedures or Payroll, or he can work through the complete series of modules on Basic Bookkeeping, Purchasing, or Advertising.

For further information on NIMAT's Programs please contact:

Mr. Raymond D. Martin, Executive Director
Newfoundland Institute for Management
Advancement and Training
P.O. Box 9554
St. John's, Nfld.
A1A 2Y4

(705) 753-3707/753-3711

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

The Ontario Management Development Program is comprised of a variety of business subjects designed to suit the needs of owners, managers, and potential supervisory personnel to help them operate an enterprise in a more profitable and efficient manner through the use of modern management techniques.

The four major course categories which cover segments of the principal areas of management are: (1) Marketing, (2) Material Resources, (3) Human Resources, and (4) Financial and Legal. To receive an O.M.D.P. Certificate, the student must complete a total of six courses, one from each of the above categories and two optional courses relating to business and industry.

Courses are specifically for conditions in Ontario, and are delivered through the Colleges of Applied Arts and Technology. For further information regarding the program, contact your local College of Applied Arts and Technology.

The courses in the Program are developed by the FBDB or the O.M.D.P. The following course outlines, are those developed by the O.M.D.P. and are of particular interest to the small business owner.

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: HOW TO START A SMALL BUSINESS

Objectives:

- (1) To explore the nature of small business and the reasons for the high rate of failure.
- (2) To understand the importance of good management for success, and the pros and cons of being an owner/manager.
- (3) To consider the different forms of organization a business can have.
- (4) To realize the importance of a business plan.
- (5) To weigh the merits of starting a new business or buying an established business.
- (6) To appreciate the importance of location to the success of small business.
- (7) To develop an appreciation for the other considerations essential for successful business operations.
- (8) To present guidelines to use in appraising established businesses.
- (9) To understand the importance of all the above objectives before committing oneself to a specific course of action.
- (10) To understand that planning and financial estimates are needed before starting a business.
- (11) To develop a consciousness of the various cost requirements necessary to start a business.
- (12) To familiarize the entrepreneur with the types of financing available for new businesses and their sources.
- (13) To understand what is "working capital", its importance and how to assess working capital needs.
- (14) To outline the procedure to follow when submitting a loan application.
- (15) To appreciate that marketing is a basic function in any business.
- (16) To understand the marketing concept and the impact of customer orientation in all aspects of doing business.
- (17) To appreciate the uncontrollable external realities that form the environment within which the businessman must operate.

Objectives (cont'd.):

- (18) To show participants how they can match their ideas to market realities by:
 - a) learning what questions to ask,
 - b) gaining familiarity with some of the sources of information to answer these questions, and
 - c) selecting target markets and developing realistic customer and market profiles.
- (19) To show participants how to establish realistic goals and a sales forecast, and to have them recognize the importance of "homework" in developing a good marketing and business plan.
- (20) To identify the elements of the marketing mix and to show how they are interrelated.
- (21) To show that within the factors of product, price, place/distribution and promotion, there is a variety of options from which the entrepreneur may choose.
- (22) To illustrate some fairly simple measurement devices (break even analysis, mark-ups, demand sensitivity) that participants can employ.
- (23) To show the complete marketing system and how a logical sequence of analysis leads to a workable marketing strategy.
- (24) To understand the difference between a "one-man operation" and a "linear organizational structure".
- (25) To know the elements of a payroll system.
- (26) To appreciate the importance of motivation in employee productivity.
- (27) To understand the hiring process, inclusive of:
 - a) Task analysis and job descriptions,
 - b) The recruiting process,
 - c) Selection and selection interviews,
 - d) Initial training and orientation to the job,
 - e) Evaluation and feedback.
- (28) To recognize the importance of up-to-date and complete personnel records.
- (29) To understand purchasing/inventory control and its significance to a business.
- (30) To appreciate purchasing policies and the need for good control on receiving and checking goods.

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

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- (31) To understand different inventory control systems.
- (32) To develop an appreciation for and understanding of financial statements as the Balance Sheet and the Profit and Loss Statement and how they can be interpreted as a test of the financial health of the business.
- (33) To develop an understanding of financial planning through cash flow forecasts, "break-even" analysis, budgeting, and proforma financial statements.
- (34) To introduce the most common legislative acts and regulations that can affect small business operations.
- (35) To acquaint participants with the levels of government responsible for these various acts and regulations and from which sources information on these is available.

Intended Participants:

This course is intended primarily for individuals interested in starting their own small businesses - persons with a minimum of business experience and contemplating a first venture; those with some limited entrepreneurial experience; and those who may have recently become owners/managers.

Instructional Form:

Case method and group discussion, supplemented by texts, project exercises, and student reading notes, comprising 10 study sessions of approximately 3 hours each. Transparency masters are provided with instructional modules.

Contents:

<u>SESSION</u>	<u>TITLES</u>
1	STARTING A SMALL BUSINESS Case: Choosing a Legal Form The Business Plan
2	ESTABLISHING A BUSINESS Case: Existing Businesses vs a New Business Location and Physical Requirements
3	FINANCIAL REQUIREMENTS Case: Start-up Costs Sources of Financing

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

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<u>SESSION</u>	<u>TITLES</u>
4	THE MARKETING PROCESS Case: Target Markets Sales Forecast
5	MARKETING STRATEGY Case: Marketing Mix Marketing Plan
6	MANAGEMENT AND STAFFING
7	PURCHASING AND INVENTORY CONTROL Case: Setting up the System
8	FINANCING STATEMENTS Case: Are They Worth the Effort?
9	FINANCIAL CONTROLS Case: Making Figures Work for You
10	GOVERNMENT REGULATIONS Case: Municipal, Provincial, and Federal Requirements Course Review and Evaluation

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: MANAGEMENT APPROACH TO CREDIT AND COLLECTIONS

Objectives:

- (1) To develop a managerial concern for the planning, organizing, co-ordinating and controlling of the credit and collection function.
- (2) To develop an understanding of the credit and collection cooperation that is consistent with prudent financial management and the maximization of operating profits.

Intended Participants:

Management personnel responsible for credit and collection operations; owner/managers of small and medium-sized businesses and industries; financial staff interested in a more comprehensive knowledge of the credit function in business. Some familiarity with the mechanics of credit and collections on the part of participants would be an advantage in the course.

Instructional Form:

Case method and discussion, supplemented by student reading notes, comprising 10 study sessions of approximately 2½ hours each.

Course Outline:

Contents:

<u>SESSION</u>	<u>TITLES</u>
1	NATURE AND ROLE OF CREDIT Case: Bank of Ontario
2	SCOPE AND OBJECTIVES OF CREDIT MANAGEMENT Case: Chinguacousy Artificial Stone Limited Silvercloud and Montini Limited
3	MANAGEMENT OF THE CREDIT FUNCTION Case: Pioneer Paint Limited Alpha Pool Services Limited
4	ANALYSIS OF THE CREDIT RISK Case: Goodleaf Wholesale Company Limited

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<u>SESSION</u>	<u>TITLES</u>
5	SOURCES AND INTERPRETATION OF CREDIT INFORMATION Case: Omega Building Products Limited
6	FINANCIAL STATEMENT ANALYSIS - PART I Case: Alpha Chemical Company Limited Upper Canada Provincial Trust Company
7	FINANCIAL STATEMENT ANALYSIS - Part II Case: Rolf Stores Comparative Financial Statement Analysis, A, B, C Belloil Company Limited Sargent Foods Limited
8	MANAGEMENT OF THE COLLECTION FUNCTION Case: Liberation Fashions Limited National Hardware Distributors Limited
9	PROTECTION OF CREDITOR'S RIGHTS Case: Sargent Foods Limited Paignton's Hardware Doctor No Jade Distributor's Limited Kanawaki Furnishing Company Limited
10	ADJUSTMENT METHODS BETWEEN DEBTORS AND CREDITORS Case: National Financial Services Limited Canadian Sight and Sound Limited Jade Distributors & Bankruptcy Proceedings, A, B Omega Wholesale Distributors Limited

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: PLANNING PROFITABLE ADVERTISING

Objectives:

- (1) To understand the role and significance of advertising in marketing operations.
- (2) To appreciate the relative merits of various advertising media on cost, sales, and consumer response.
- (3) To appreciate the use of advertising agencies in sales promotion.
- (4) To familiarize the non-professional advertiser with the advertising process in lieu of agency services.

Intended Participants:

Small and medium-sized business and industry owner/managers, new and prospective advertising agency employees, company executives assuming advertising responsibilities, or requiring greater knowledge of the advertising process, business managers desirous of advertising independent of advertising agency services, business people interested in increasing their general business management knowledge.

Instructional Form:

Case study supplemented by student reading notes, comprising 10 study sessions of approximately 2½ hours each.

Contents:

<u>SESSION</u>	<u>TITLES</u>
1	ADVERTISING PLANNING Case: Bradley Body Company Limited
2	THE ADVERTISING AGENCY Case: The Master Spark Plug Company of Canada Ltd.
3	COST EFFICIENCY AND BUDGETING Case: Alex Muir Radio and TV Company

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<u>SESSION</u>	<u>TITLES</u>
4	ADVERTISING EFFECTIVENESS Case: Niagara Savings Corporation
5	THE PSYCHOLOGICAL FACTORS OF ADVERTISING Case: Bondeco - Industry Image
6	THE PRINT MEDIA Case: Mackenzie Men's Wear
7	CREATIVE ADVERTISING FOR PRINT MEDIA Case: Richard Black Stereo
8	OTHER ADVERTISING MEDIA Case: Eddie Bauer
9	WRITING COMPANY Case: Peterson Chemical Company A/B/C
10	RETAIL ADVERTISING Case: Lighting Unlimited - Franchise Advertising

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: PLANNING FOR PROFITS

Objectives:

- (1) To show how better utilization of information available from accounting records can improve the efficiency of business operations.

Intended Participants:

Owners/managers of all types of businesses, and their wives/husbands; office managers, personnel in financial departments and key employees who can influence financial decisions; people starting or purchasing a business.

Instructional Form:

Case study and group discussion supplemented by student reading notes, comprising 10 study sessions of approximately 2½ hours each.

Course Outline:

Contents:

<u>SESSION</u>	<u>TITLES</u>
1	WHAT IS "MANAGEMENT INFORMATION" AND HOW DOES A MANAGER GET IT? Case: The Christopher Davis Case "A"
2	MANAGEMENT INFORMATION IN THE PROFIT AND LOSS STATEMENT Case: The Christopher Davis Case "B"
3	MANAGEMENT INFORMATION THE BALANCE SHEET Case: The Christopher Davis Case "C"
4	WHERE DID THE WORKING CAPITAL AND CASH GO? Case: The Christopher Davis Case "D"
5	FORWARD PLANNING - THE PROFIT PLAN Case: The Christopher Davis Case "E"
6	FORWARD PLANNING - THE BALANCE SHEET AND CASH FLOW Case: The Christopher Davis Case "F"
7	COMPARISON OF ACTUAL RESULTS WITH THE PLANS AND ADJUSTING THE PLANS Case: The Christopher Davis Case "G"

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<u>SESSION</u>	<u>TITLES</u>
8	MANAGEMENT DECISION-MAKING Case: The Christopher Davis Case "H"
9	DECISION-MAKING UNDER UNCERTAINTY - BREAK-EVEN POINT ANALYSIS Case: The Christopher Davis Case "I"
10	DECISION-MAKING UNDER UNCERTAINTY - DECISION TREE AND GAME THEORY Case: The Christopher Davis Case "J"

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: SMALL BUSINESS MANAGEMENT

Objectives:

- (1) To develop an understanding of an appreciation for the many facets of management confronting the small business entrepreneur/owner/manager in day to day operations.
- (2) To develop management objectivity in decision making and relate its significance to the profit motive and the ongoing success of the business.
- (3) To focus on operating organization and control, utilization of financial and other resources, and operating and marketing policies as factors of successful small business management.
- (4) To show the business neophyte "there's more to business than meets the eye" and that management is an art in itself!

Intended Participants:

Owner/managers of small and medium-sized businesses and industries; entrepreneurs starting a small business; owner/managers desirous of expanding their knowledge into other areas of management competence, or "updating" themselves, or just interested in a "refresher" course.

Instructional Form:

Case method, discussions, exercises and assignments comprising 10 study sessions.

Note that each session can be given on a 3 hour study basis or expanded to a full study day depending on the study consideration desired.

Course Outline:

<u>SESSION</u>	<u>TITLES</u>
1	AN INTRODUCTION TO SMALL BUSINESS MANAGEMENT Case: Administration - Organizing, Coordinating

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<u>SESSION</u>	<u>TITLES</u>
2	ENTERING A BUSINESS Case: Administration - Measuring Performance Controlling
3	PLANNING, ORGANIZING AND DIRECTING YOUR BUSINESS Case: Administration - Assigning Work, Following Up
4	THE ORGANIZATIONAL FORM Case: Administration - Getting Feedback, Writing Reports
5	SMALL BUSINESS FINANCING Case: Administration - Presenting Information, Problem Solving
6	MARKETING - STRATEGY, SITE LOCATION, PROMOTION AND PRICING Case: Supervision - Leadership - Garfield Cannery
7	SELECTING, TRAINING AND COMPENSATING YOUR PEOPLE Case: Supervision - Leadership - Garfield Cannery
8	PURCHASING AND INVENTORY CONTROL Case: Leadership - Motivation - Convenience Food Stores
9	ACCOUNTING AND FINANCIAL CONTROL Case: Leadership - Motivation - Convenience Food Stores
10	MANAGEMENT STRATEGIES FOR SMALL BUSINESS Case: Leadership - Motivation

ONTARIO MANAGEMENT DEVELOPMENT PROGRAM

Course: SMALL BUSINESS FINANCIAL MANAGEMENT

Objectives:

- (1) To provide the "non-financial" business person with an understanding of and an appreciation for basic financial statements.
- (2) To develop or improve the "non-financial" business person's ability to make better financial management decisions.

Intended Participants:

Owner/managers of small businesses who are involved in all management functions and how, in particular, are sensitive to the financial conditions of their operations at all times; non-financial managers and supervisors desirous of an appreciation for financial statements and financial management; skill-proficient entrepreneurs starting a small business.

Instructional Form:

Case method, discussion, exercises and student readings, comprising 12 sessions of 2½ hours each for a course total of 30 hours. Course language is expressed in "layman's terms", and the assumption is made that the participant doesn't even know what a "balance sheet" and an "income statement" are.

Course Outline:

Contents:

<u>SESSION</u>	<u>TITLE</u>
1	INTRODUCTION TO COURSE
2	THE BALANCE SHEET AND ITS COMPONENTS
3	THE MEANING OF THE BALANCE SHEET COMPONENTS
4	SOME USEFUL POINTS AS A GUIDE TO READING THE BALANCE SHEET
5	THE INCOME STATEMENT' ITS COMPONENTS AND THEIR MEANING
6	FINANCIAL ANALYSIS
7	WORKING CAPITAL

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<u>SESSION</u>	<u>TITLE</u>
8	SOURCES AND APPLICATIONS OF FUNDS.
9	THE OPENING BALANCE SHEET
10	THE PRO FORMA BALANCE SHEET
11	THE OPERATING FORECAST
12	THE CASH FLOW FORECAST

THE SOCIETY OF MANAGEMENT ACCOUNTANTS OF CANADA

With the firm belief that the private sector is best equipped to train itself on how to operate successfully and as a professional management training organization established coast-to-coast in Canada, the Society of Management Accountants of Canada has established its Seminars for Small Business.

These programmes, based on the Financial Post/MacMillan Series of Canadian Small Business books, are pragmatic, low cost and 100% Canadian seminars and will be available in 44 centres across Canada stressing a "HOW TO DO BETTER" theme. The professional resource staff will counsel and advise seminar participants in addition to providing an excellent learning exercise. Course materials will include a copy of the relevant Canadian Small Business book for each seminar.

Cost: \$65/seminar.

SEMINAR DESCRIPTIONS

STARTING AND OPERATING YOUR OWN BUSINESS: The most critical factor in the life of the business is its set up and organization. We present in this seminar, the key information and sources necessary to those already in business and for those about to start. In this seminar a unique collection of advice is available.

Speakers include representatives of the federal and provincial government; banks, venture capitalists and other sources of finance; management consultants and experts in advising small business and successful entrepreneurs who will share their secrets to success.

* * * * *

HOW TO MAKE MONEY IN A RETAIL STORE OF YOUR OWN: The unique problems of starting your own retail business in Canada will be presented, analyzed and discussed in this one day seminar. Representatives of major franchise organizations, retail chains, retail consultants, bankers, and government, will be in attendance to present practical solutions to real problems. Questions of financing, locations, merchandising, law and assistance will be dealt with in detail. Ample opportunity will be made available for discussions and questions.

The day's guests will make presentations on government programmes, assistance and financing, banking financing and venture capitalist, consultants analysis and advice and case histories of entrepreneurs and innovative retailers.

THE SOCIETY OF MANAGEMENT
ACCOUNTANTS OF CANADA

SEMINAR DESCRIPTIONS (CONTD):

This programme will be of relevance to all who are aspiring to start their own retail business, all who are already in retailing and for those considering investing in the various franchised chains.

This is the first retailing programme of its kind in Canada.

All participants will receive a copy of the book "HOW TO MAKE MONEY IN A RETAIL STORE OF YOUR OWN" by Kneider.

* * * * *

STARTING YOUR OWN BUSINESS - FOR WOMEN ONLY: Because of the unique problems faced by women in establishing, financing and administering their own business and the emergence of a new class of women entrepreneurs in our economy, a unique one day seminar dealing with the key issues relevant to women will be presented. This programme will present an opportunity for women who wish to create their own business or acquire a franchise and for those who are already in business to meet, interact, confront and learn.

Guest speakers from key positions in government, financial institutions, educational organizations and successful women consultants and entrepreneurs will discuss pragmatic material of immediate relevance. Professionals, students, corporate employees and anyone interested in opportunities in Canadian business for women will find this an exciting experience.

The day's topics will include: getting government help and utilizing federal and provincial government programmes, obtaining financing with representatives of commercial banks, venture capitalists and the Federal Business Development Bank, strategies and advice for successful business with key success stories from women entrepreneurs and business consultants.

This programme, being totally unique in Canada and custom designed to the needs of women, is a must for those in business already or for those contemplating the start-up of a new business.

All participants will receive a copy of the book "STARTING AND MANAGING YOUR OWN SMALL BUSINESS" by Archer and White.

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THE SOCIETY OF MANAGEMENT
ACCOUNTANTS OF CANADA

SEMINAR DESCRIPTIONS (CONTD):

YOU AND THE LAW - WHAT EVERY SMALL BUSINESS OWNER NEED TO KNOW:

Objectives: To ensure the independent business owner is aware of the broad range of legal factors that affect every area of business management. By being aware of legal considerations, the business owner can plan his operation with full awareness of his obligations under the law. In short, the seminar will familiarize both the beginner and the entrepreneur with the basic facts of commercial law.

Topics include:

- legal factors for start-up
- financing and taxation
- your resources-human and physical
- federal, provincial and municipal laws
- keeping track of your business
- marketing and selling your product
- social responsibilities of the business owner
- employment practices
- getting out of business

Answers will be provided to such questions as:

- what can I do about receiving damaged goods?
- how do I guard against bad cheques?
- do I have to disclose my company's earnings?
- how can I patent my invention?
- where do I get rulings on tariff rates?

Participants will be provided with a comprehensive list of legal considerations which may affect the business owner during the life of his business. All participants will receive a copy of the book "YOU AND THE LAW: WHAT EVERY SMALL BUSINESS OWNER NEED TO KNOW" by Teckert and McDonald from Financial Post/Macmillan.

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SUCCESSFUL BUSINESS MANAGEMENT

Sponsored by RoyNat and SB Capital, the Successful Business Management Program is a correspondence course in Small Business Management consisting of 26 sessions. These sessions, developed by successful entrepreneurs and business professionals, provide the student with the information and advice which he can apply immediately in his own business to increase profits, attract new capital, and grow. The cost of the program is \$298 and includes course notes, mini-case histories, questionnaires and a Key Word Index.

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COURSE PROGRAM

SESSION

- 1 STAGES OF GROWTH
 Causes of interruptions to growth
 Unique characteristics of each stage
 Changing demands on management
 Changing financial needs

- 2 OTHER PEOPLE'S HELP
 The help pyramid
 The Semi-Insiders - how they can help
 The "devil you know" principle
 Where to go for free help

- 3 SOURCES OF CAPITAL
 Profiles of 20 Sources of Capital
 Ground rules for approaching sources
 Risk/Reward: matching sources to needs
 Improving banking and other relationships

- 4 LEGAL FORMS OF BUSINESS ORGANIZATION
 Me, We or "Inc."?
 Details of all provincial and federal requirements
 Shareholders - advantages, rights and liabilities
 Types of shares: Board of Directors; routine requirements

- 5 PLANNING
 Tools for setting personal and company objectives
 Assessing strengths and weaknesses
 Forecasting and setting targets
 Monitoring performance

- 6 SIMPLE RECORD-KEEPING SYSTEMS
 Use of financial statements and records
 Simple Bookkeeping and accounting explained
 Setting up your books
 Physical protection of assets

SESSION

- 7 ORGANIZING YOURSELF AND OTHERS
 The "pressure point" principle
 What happens when you're not there
 Effective delegation
 Responsibility, authority and accountability
- 8 PERSONNEL PLANNING AND TRAINING
 Finding and hiring the right people
 How to interview - and fire
 Turnaround and planning for personnel
 Use of professionals and agencies
- 9 FINANCIAL STATEMENTS AND RATIO ANALYSIS
 Operating, management and financial data
 How to use ratios
 Deciphering "financials"
 Using the information with banks and outsiders
- 10 CASH FLOW BUDGETING
 Going bankrupt when you're profitable?
 Preparation of a simple Cash Flow
 Cash Flow as management tool - inside
 Cash Flow as a communications tool - outside
- 11 MARKETING PLANNING
 Finding and defining a niche
 Determining strengths and weaknesses
 How much to spend on marketing - where?
 The prospect list/customer profile
- 12 SALES FORECASTING AND PRICING
 Techniques of forecasting
 Problems in selling the "right" price
 The forecast as "carrot" and "stick"
 The all important "gross margin"
- 13 CREDIT AND RECEIVABLES
 When, Where and How to grant credit
 Determining the real cost of credit
 Managing receivables - collection techniques
 The use of third parties
- 14 PAYABLES AND DEALING WITH SUPPLIERS
 Managing trade credit - "stretching"
 Factors in selecting suppliers
 Obtaining and evaluating quotations
 Negotiating special terms
- 15 ADVERTISING AND PROMOTION
 How much and where?
 What you can do yourself
 Basic rules for a good ad
 Getting free publicity

SESSION

- 16 SALES STAFFING AND MANAGEMENT
 Order taking versus selling
 Finding and motivating good salesmen
 Compensation
 The presentation
- 17 PURCHASING AND INVENTORY PRACTICES
 The real cost of inventory
 Determining optimum inventory levels
 "Physical versus perpetual" systems
 Purchasing practices and procedures
- 18 PRODUCTION PLANNING AND CONTROL
 Improving co-ordination
 Use of PERT and CPM
 Overcoming overtime, downtime, late deliveries
 Setting up production
- 19 COST BENEFIT ANALYSIS
 Removing the guesswork from decision making
 Make or buy, buy or lease
 Use of simple, mathematical tools
 Concepts, return, pay-back, present value
- 20 YOU, YOUR COMPANY AND THE LAW
 Common versus case law
 Contracts, consideration, breach, etc.
 Pitfalls to watch for
 How to make good use of your lawyer
- 21 VALUING YOUR BUSINESS: PREPARING IT FOR SALE
 How much is your company worth?
 Finding the right buyer
 What the buyer looks for
 Negotiating a good deal
- 22 PURCHASING A COMPANY
 What you should know about the vendor
 What price to pay and how
 Techniques of financing earn-outs, leveraging, etc.
- 23 BANKRUPTCY AND INSOLVENCY
 What it means to you or them
 Instituting bankruptcy or receivership
 Rights of creditors; risk of customers
 Proposals - making and living with them
- 24 INSURANCE
 Using an agent - wisely
 Insuring the risks, not the frills
 Setting up a system for review
 What would your real losses be?

SUCCESSFUL BUSINESS MANAGEMENT

-403-

SESSION

25

TAX PLANNING

The ways to reduce or to avoid taxes
Factors to consider in tax planning
Getting the benefit of a privately owned corporation
Different types of income; rates compared

26

THE ENTREPRENEUR

Who goes into Business?
Who are the ones who succeed?
Using the advantages of being small
Why it's worth the effort

* * * * *

FOR FURTHER INFORMATION PLEASE WRITE:

Successful Business Management
18 King Street, East, Suite 200
Toronto, Ontario
M5C 9Z9

TRADE ASSOCIATIONS

From a list provided by the Small Business Secretariat, 215 trade associations were surveyed for their involvement in the delivery of small business training programs.

The survey did not provide the expected results. Only sixty-three replies were received, which represents a return of 29%. We also encountered difficulties in reaching some of the trade associations as 15% of the inquiry letters were returned for "change of address" reason. Of the sixty-three replies, 28 associations (13%) are conducting educational activities for their members. The following list of the respondents' programs, indicate that very little fits in to our definition of small business education for the purpose of this survey.

* * * * *

LIST OF TRADE ASSOCIATIONS

ATLANTIC BUILDING SUPPLY DEALERS ASSOCIATION

Building Supply Sales
Materials Estimating and Effective Selling
Residential Framing Lumber Estimating
Principles of Supervision and Management

BAKERY COUNCIL OF CANADA

Bakery Technology
Metrication
Snaitation

B.C. MOTELS, RESORTS, AND TRAILER PARKS ASSOCIATION

Management Advancement Program

CANADIAN ASSOCIATION OF OILWELL DRILLING CONTRACTORS

Contracts and Insurance Seminar
Manpower and Training Seminar
Superintendents Conference on Manpower and Training

CANADIAN BOOKSELLERS ASSOCIATION

Bookselling Seminar

CANADIAN BOOK PUBLISHERS' COUNCIL

International Marketing

CANADIAN CONSTRUCTION ASSOCIATION

Labour Relations
Estimating
Accounting
Law

CANADIAN CO-OPERATIVE CREDIT SOCIETY LIMITED

Canadian Credit Union Institute - Fellows Program

THE CANADIAN FEDERATION OF RETAIL GROCERS

Supermarket Supervision
Protecting Store Profits
Front-End Management
Professional Checker
Work Methods
Increasing Gross Profits
Managing Profitable Frozen Foods
Produce Merchandising
Selling More Produce
Profitable Dairy Department Management
Meat Market Management
Inventory Investment Control
Improving & Measuring Employee Relations
Improving and Measuring Your PR at the Front End

CANADIAN INSTITUTE OF CHARTERED ACCOUNTANTS

How Much Are You Really Worth? - Personal Financial
Planning and Reporting

CANADIAN REAL ESTATE ASSOCIATION

Introduction to Real Estate Office Management
Communications and Leadership
Principles of Real Estate Marketing Management
Recruiting, Selecting, Training and Retaining Sales Persons

CANADIAN RESTAURANT AND FOOD SERVICES ASSOCIATION

Controlling Food Cost
Creative Merchandising Techniques
Building Training Skills

CANADIAN RETAIL HARDWARE ASSOCIATION

Hardware Management Institute - Train-tape Program
Advance Course in Hardware Retailing

CANADIAN SPORTING GOODS ASSOCIATION

Annual Conference Seminars
Retailer Cost-of-Doing Business Survey

CANADIAN WHOLESALE HARDWARE ASSOCIATION

Sales Training (Correspondence - wholesale Hardware Salesman)

CANADIAN WINDOW AND DOOR MANUFACTURERS ASSOCIATION

Seminars of presentations featured at semi-annual meetings

THE CONFERENCE BOARD IN CANADA

Sales Forecasting

FEDERATION OF AUTOMOBILE DEALER ASSOCIATIONS OF CANADA

One-day seminars - various topics such as: leasing, parts and services
sales.

GRAPHIC ARTS INDUSTRIES ASSOCIATION

GAIA - Cost Knowledge System
 GAIA - Ratio Understanding for Profit
 Productivity Seminar
 Managing Growth for Profit
 Annual Ratio Studies
 Annual Conference - Seminars on various subjects

HOTEL ASSOCIATION OF CANADA

Number of courses offered by provincial government agencies
 and Community Colleges in Hospitality and Hotel management

THE INSTITUTE OF CHARTERED ACCOUNTANTS OF ONTARIO

Helping Small Business Clients Utilize Computers

LANDSCAPE ONTARIO

Annual Convention and Trade Show (educational programme)

THE MANITOBA HOTEL ASSOCIATION

Management Advancement Training Programs

THE MOTION PICTURE INSTITUTE OF CANADA

Seminars and Symposium - feature film financing, finance Seminar II,
 Production Seminar, Screenwriting Workshop

NATIONAL DAIRY COUNCIL OF CANADA

Technical seminars (eg. cottage chesse making) on demand

ONTARIO GENERAL CONTRACTORS ASSOCIATION

Management for Construction Superintendents
 Techniques of Planning and Scheduling
 Project Control and Administration
 Construction Law
 Labour Relations for Construction Superintendents
 Construction Safety and First-Aid Management

PURCHASING MANAGEMENT ASSOCIATIONS OF CANADA

Professional Development Program
 Seminars - various topics such as: M.B.O., Labour Relations.

RETAIL COUNCIL OF CANADA

Annual Convention - Educational Program
 Statistical Programs - financial and Operating Results, and Skrinkage
 Survey
 Seminars: Management Skills for Retailers
 Fashion Merchandising Seminar
 So You're Thinking of Franchising
 Merchandising in the 1980's for Independent Retailers
 How to Profit from EDP
 Furniture Merchandising Seminar
 Management Skills for (Independent) Retailers
 Loss Prevention: In-Store Staff Training
 Professional Buying Workshop
 Look Before You Lease
 Dynamics of Management for Independent Retailers
 Promotion Dollars for Profit

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PAMPHLETS

F.B.D.B. - "MINDING YOUR OWN BUSINESS" SERIES

<u>No.</u>	<u>TITLE</u>
1	Reference Booklets for Small Business
2	Giving Credit to Your Customers
3	Presenting Your Case For a Term Loan
4	Forecasting for a New Business
5	Managing Your Current Assets
6	Forecasting for a New Business
7	Managing Your Fixed Assets
8	Managing Your Cash
9	Working Capital
10	Changes of Ownership
11	Planning a Motel
12	Equity Capital for Small Companies
13	Paying Your Employees
14	Personnel Records
15	Planning the Start of Your Retail Business
16	Financing for Your Retail Business
17	Retail Pricing
18	Managing Your Retail Inventory

ROYAL BANK - "YOUR BUSINESS MATTERS" SERIES

<u>No.</u>	<u>TITLE</u>
1	How to Finance Your business
2	Pointers to Profit
3	Good Management, Your Key to Survival
4	Exporting - Improving An Open Door to Additional Profits
5	Financial Reporting and Analysis
6	Control over Direct Costs and Pricing
7	Planning and Budgeting
8	Control over Inventory Investment
9	Taxation and Independent Business
10	Credit Management and Collection
11	Evaluation and Management of Fixed Assets
12	Management of Liabilities and Equities

"MINDING YOUR OWN BUSINESS" Federal Business Development Bank

<u>No</u>	<u>Title</u>
1	Reference Booklets for Small Business
2	Giving Credit to Your Customers
3	Presenting Your Case for a Term Loan
4	Forecasting for an Existing Business
5	Managing your Current Assets
6	Forecasting for a New Business
7	Managing Your Fixed Assets
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SMALL BUSINESS ADMINISTRATION

U.S. GOVERNMENT AGENCY

Publications

October 1978

FOR-SALE BOOKLETS

The management assistance booklets on this list are published by the Small Business Administration and are sold by the Superintendent of Documents, not by the Small Business Administration.

HOW TO ORDER from the SUPERINTENDENT OF DOCUMENTS: Complete the order blank on page 4. Send it with your check, or money order to the Superintendent of Documents, Government Printing Office, Washington, D.C. 20402. Make check or money order payable to the Superintendent of Documents. Do not send postage stamps or cash. These booklets are NOT SOLD by the Small Business Administration. Foreign remittances should be made either by international money order or draft on an American bank. Prices subject to change without notice. Minimum order is \$1.

SMALL BUSINESS MANAGEMENT SERIES

The booklets in this series provide discussions of special management problems in small companies.

No.		Stock No.	Pages	Price
1	An Employee Suggestion System for Small Companies. Explains the basic principles for starting and operating a suggestion system. It also warns of various pitfalls and gives examples of suggestions submitted by employees.	045-000-00020-6	18	\$1.10
3	Human Relations in Small Business. Discusses human relations as the subject involves finding and selecting employees, developing them, and motivating them.	045-000-00036-2	38	1.60
4	Improving Material Handling in Small Business. A discussion of the basics of the material handling function, the method of laying out workplaces, and other factors to setting up an efficient system.	045-000-00041-9	42	1.25
15	Handbook of Small Business Finance. Written for the small businessowner who wants to improve financial-management skills. Indicates the major areas of financial management and describes a few of the many techniques that can help the small businessowner.	045-000-00139-3	63	1.50
20	Ratio Analysis for Small Business. Ratio analysis is the process of determining the relationships between certain financial or operating data of a business to provide a basis for managerial control. The purpose of the booklet is to help the owner/manager in detecting favorable or unfavorable trends in the business.	045-000-00150-4	65	1.80
22	Practical Business Use of Government Statistics. Illustrates some practical uses of Federal Government statistics, discusses what can be done with them, and describes major reference sources.	045-000-00131-8	28	1.40
25	Guides for Profit Planning. Guides for computing and using the break-even point, the level of gross profit, and the rate of return on investment. Designed for readers who have no specialized training in accounting and economics.	045-000-00137-7	59	1.90

No.		Stock No.	Pages	Price
26.	Personnel Management Guides for Small Business An introduction to the various aspects of personnel management as they apply to small firms.	045-000-00126-1	79	\$1.10
27.	Profitable Community Relations for Small Business Practical information on how to build and maintain sound community relations by participation in community affairs.	045-000-00033-8	36	1.50
28.	Small Business and Government Research and Development An introduction for owners of small research and development firms that seek Government R and D contracts. Includes a discussion of the procedures necessary to locate and interest Government markets.	045-000-00130-0	41	1.25
29.	Management Audit for Small Manufacturers A series of questions which will indicate whether the owner-manager of a small manufacturing plant is planning, organizing, directing, and coordinating the business activities efficiently.	045-000-00151-2	44	1.60
30.	Insurance and Risk Management for Small Business A discussion of what insurance is, the necessity of obtaining professional advice on buying insurance, and the main types of insurance a small business may need.	045-000-00037-1	72	2.10
31.	Management Audit for Small Retailers Designed to meet the needs of the owner-manager of a small retail enterprise. 149 questions guide the owner-manager in a self examination and a review of the business operation.	045-000-00149-1	50	1.80
32.	Financial Recordkeeping for Small Stores Written primarily for the small store owner or prospective owner whose business doesn't justify hiring a full-time bookkeeper.	045-000-00142-3	135	2.50
33.	Small Store Planning for Growth A discussion of the nature of growth, the management skills needed, and some techniques for use in promoting growth. Included is a consideration of merchandising, advertising and display, and checklists for increases in transactions and gross margins.	045-000-00152-1	99	2.40
34.	Selecting Advertising Media—A Guide for Small Business Intended to aid the small business person in deciding which medium to select for making the product, service, or store known to potential customers and how best to use advertising money.	045-000-00154-7	133	2.75
35.	Franchise Index/Profile Presents an evaluation process that may be used to investigate franchise opportunities. The Index tells what to look for in a franchise. The Profile is worksheet for listing the data.	045-000-00125-3	56	2.00
36.	Training Salesmen to Serve Industrial Markets Discusses role of sales in marketing program of small manufacturer and offers suggestions for sales force to use in servicing customers. Provides material to use in training program.	045-000-00133-4	85	2.20
37.	Financial Control by Time-Absorption Analysis A profit control technique that can be used by all types of business. A step-by-step approach shows how to establish this method in a particular business.	045-000-00134-2	138	2.50

No.		Stock No.	Pages	Price
38	Management Audit for Small Service Firms A do-it-yourself guide for owner-managers of small service firms to help them evaluate and improve their operations. Brief comments explain the importance of each question in 13 critical management areas.	045-000-00143-1	67	\$1.80
39	Decision Points in Developing New Products Provides a path from idea to marketing plan for the small manufacturing or R&D firm that wants to expand or develop a business around a new product, process, or invention.	045-000-00146-6	64	1.00

STARTING AND MANAGING SERIES

This series is designed to help the small entrepreneur in the effort "to look before leaping" into a business. The first volume in the series—*Starting and Managing a Small Business of Your Own*—deals with the subject in general terms. Each of the other volumes deals with one type of business in detail, and their titles are designed to inform of their contents. Available titles are listed below.

No.		Stock No.	Pages	Price
1	Starting and Managing a Small Business of Your Own	045-000-00123-7	97	\$2.40
14	Starting and Managing a Carwash	045-000-00060-5	76	1.10
19	Starting and Managing a Pet Shop	045-000-00065-6	40	.75
20	Starting and Managing a Small Retail Music Store	045-000-00107-5	81	1.30
22	Starting and Managing an Employment Agency	045-000-00109-1	118	1.30
24	Starting and Managing a Small Shoestore	045-000-00127-0	104	1.35

NONSERIES PUBLICATIONS

	Stock No.	Pages	Price
Export Marketing for Smaller Firms A manual for owner-managers of smaller firms who seek sales in foreign markets.	045-000-00112-1	134	\$2.50
U.S. Government Purchasing and Sales Directory A directory for businesses that are interested in selling to the U.S. Government. Lists the purchasing needs of various Agencies.	045-000-00153-9	169	4.00
Managing for Profits Ten chapters on various aspects of small business management, for example, marketing, production, and credit.	045-000-00005-2	170	2.75
Buying and Selling a Small Business Deals with the problems that confront buyers and sellers of small businesses. Discusses the buy-sell transaction, sources of information for buyer-seller decision, the buy-sell process, using financial statements in the buy-sell transaction, and analyzing the market position of the company.	045-000-00003-6	122	2.30
Strengthening Small Business Management Twenty-one chapters on small business management. This collection reflects the experience which the author gained in a life time of work with the small business community.	045-000-00114-8	158	2.75

A Companion Form, SBA-115A, Lists Current Free Publications and Is Available Without Charge From SBA, P.O. Box 15434, Fort Worth, Texas 76119 or by calling toll free 800-433-7212.

SMALL BUSINESS ADMINISTRATION PUBLICATIONS

U.S. Government Agency

October 1978

FREE MANAGEMENT ASSISTANCE PUBLICATIONS

MANAGEMENT AIDS

These leaflets deal with functional problems in small manufacturing plants and concentrate on subjects of interest to administrative executives.

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| 170 | The ABC's of Borrowing | 209 | Preventing Employee Pilferage |
| 171 | How to Write a Job Description | 211 | Termination of DOD Contracts for the Government's Convenience |
| 176 | Financial Audits: A Tool for Better Management | 212 | The Equipment Replacement Decision |
| 178 | Effective Industrial Advertising for Small Plants | 214 | The Metric System and Small Business |
| 179 | Breaking the Barriers to Small Business Planning | 215 | How To Prepare for a Pre-Award Survey |
| 186 | Checklist for Developing a Training Program | 216 | Finding a New Product for Your Company |
| 187 | Using Census Data in Small Plant Marketing | 217 | Reducing Air Pollution in Industry |
| 188 | Developing a List of Prospects | 218 | Business Plan for Small Manufacturers |
| 189 | Should You Make or Buy Components? | 219 | Solid Waste Management in Industry |
| 190 | Measuring Sales Force Performance | 220 | Basic Budgets for Profit Planning |
| 191 | Delegating Work and Responsibility | 221 | Business Plan for Small Construction Firms |
| 192 | Profile Your Customers to Expand Industrial Sales | 222 | Business Life Insurance |
| 193 | What Is the Best Selling Price? | 223 | Incorporating a Small Business |
| 194 | Marketing Planning Guidelines | 224 | Association Services for Small Business |
| 195 | Setting Pay for Your Management Jobs | 225 | Management Checklist for a Family Business |
| 197 | Pointers on Preparing an Employee Handbook | 226 | Pricing for Small Manufacturers |
| 199 | Expand Overseas Sales with Commerce Department Help | 227 | Quality Control in Defense Production |
| 200 | Is the Independent Sales Agent for You? | 228 | Inspection on Defense Contracts |
| 201 | Locating or Relocating Your Business | 229 | Cash Flow in a Small Plant |
| 203 | Are Your Products and Channels Producing Sales? | 230 | Selling Products on Consignment |
| 204 | Pointers on Negotiating DOD Contracts | 231 | Selecting the Legal Structure for Your Business |
| 205 | Pointers on Using Temporary Help Services | 232 | Credit and Collections |
| 206 | Keep Pointed Toward Profit | 233 | Planning and Goal Setting for Small Business |
| 207 | Pointers on Scheduling Production | 234 | Attacking Business Decision Problems With Breakeven Analysis |
| 208 | Problems in Managing a Family-Owned Business | 235 | A Venture Capital Primer for Small Business. |

SMALL MARKETERS AIDS

These leaflets provide suggestions and management guidelines for small retail, wholesale and service firms.

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| 71 Checklist for Going into Business | 144 Getting the Facts for Income Tax Reporting |
| 111 Interior Display: A Way to Increase Sales | 146 Budgeting a Small Service Firm |
| 113 Quality and Taste as Sales Appeals | 147 Sound Cash Management and Borrowing |
| 118 Legal Services for Small Retail and Service Firms | 148 Insurance Checklist for Small Business |
| 119 Preventing Retail Theft | 149 Computers for Small Business - Service Bureau or Time Sharing? |
| 121 Measuring the Results of Advertising | 150 Business Plan for Retailers |
| 123 Stock Control for Small Stores | 151 Preventing Embezzlement |
| 124 Knowing Your Image | 152 Using a Traffic Study to Select a Retail Site |
| 126 Accounting Services for Small Service Firms | 153 Business Plan for Small Service Firms |
| 127 Six Methods for Success in a Small Store | 154 Using Census Data to Select a Store Site |
| 128 Building Customer Confidence in Your Service Shop | 155 Keeping Records in Small Business |
| 129 Reducing Shoplifting Losses | 156 Marketing Checklist for Small Retailers |
| 130 Analyze Your Records to Reduce Costs | 157 Efficient Lighting in Small Stores |
| 133 Can You Afford Delivery Service? | 158 A Pricing Checklist for Small Retailers |
| 134 Preventing Burglary and Robbery Loss | 159 Improving Personal Selling in Small Retail Stores |
| 135 Arbitration: Peace-Maker in Small Business | 160 Advertising Guidelines for Small Retail Firms |
| 137 Outwitting Bad Check Passers | 161 Signs and Your Business |
| 138 Sweeping Profit Out the Back Door | 162 Staffing Your Store |
| 139 Understanding Truth-in-Lending | 163 Public Relations for Small Business |
| 140 Profit By Your Wholesalers' Services | 164 Plan Your Advertising Budget |
| 141 Danger Signals in a Small Store | 165 Checklist for Profit Watching |
| 142 Steps in Meeting Your Tax Obligations | 166 Simple Breakeven Analysis for Small Stores |
| 143 Factors in Considering a Shopping Center Location | |

CANADIAN SMALL BUSINESS CASES

- a) Ecole des Hautes Etudes Commerciales
- b) Université du Québec à Montréal
- c) University of Western Ontario

UNIVERSITY OF MONTREAL GRADUATE SCHOOL
OF BUSINESS ADMINISTRATION

The University of Montreal Graduate School of Business Administration
has written up a number of case studies. For more information, contact:

Centrale de Cas
University of Montreal Graduate School of Business Administration
5225 avenue Decelles
Montreal, Quebec
H3T 1V6
(514) 343-3826

The following case studies have been written up by the Macdonald Stewart Management Chair of the University of Quebec at Montreal.

1. Leblanc Inc rug distributors I

This case study deals with the problems involved in launching an enterprise. It discusses the various factors that must be taken into account before starting a business with associates. The student is asked to decide on the validity of starting this particular business.

2. Leblanc Inc rug distributors II

This case study discusses evaluation criteria for those contemplating buying or selling a business. The student must decide whether to sell the business or propose another type of association.

3. L'Écran

This case study demonstrates the problems caused by lack of leadership when several people start a business together. The student will also see the problems caused by the absence of preparation. The student must decide whether to continue or cancel the operation.

The Benoît case studies are prefaced by an account of the background of the enterprises and the successes and failures their owners encountered.

4. Benoît--The modular home

This case study discusses the questions and problems faced by a small business that wants to launch an avant-garde product. It demonstrates the difficulties involved in the affair, from construction to distribution to marketing.

5. Benoît--Ontario

This case study is intended to make the student aware of the problems caused by rapid growth of an enterprise and the ensuing problems in delegation.

The student must decide whether to continue or cancel the project.

6. Benoit--Exportation

This case study involves exporting to the Middle East. It lists the problems faced by an SME that wishes to begin exporting. The student can see the errors of omission and commission this business makes in its export strategy, eventually leading to bankruptcy.

7. Association and grouping of independent oil merchants

This case study shows how important it is for independent merchants to form an association or some other voluntary grouping for greater efficiency and thus the capability of competing with multinational companies. The case study also establishes the difference between an association and a voluntary grouping.

8. Les Citernes

This case study demonstrates the problems of survival and continuity faced by an SME when a key person responsible for medium- and long-range planning is away. The student must suggest a way to reorganize to ensure continuity in planning.

UNIVERSITY OF WESTERN ONTARIO

6.
Annotated List of Selected Cases in
**small
business**



LIST OF RECENT NEW ENTERPRISE CASES

61050

A NOTE ON ENTREPRENEURSHIP

This note describes various attempts to define the term "entrepreneur" and to list characteristics of entrepreneurs developed in the behavioral research literature. Three levels of entrepreneur are defined as the inventor, the promoter and the owner-manager.

TEACHING NOTE, 1975

KNIGHT RM.

UNIVERSITY OF WESTERN ONTARIO, 6p

61052

TAX CONSIDERATIONS FOR THE NEW ENTERPRISE

This note briefly describes the major tax considerations for the owner-manager of a small business. It covers partnerships, corporations, business expenses, capital gains tax and succession duties in Canada in summary form.

TEACHING NOTE, 1975

KNIGHT RM.

UNIVERSITY OF WESTERN ONTARIO, 5p

61053

CHESTNUT CANOE COMPANY

The case is essentially a business proposal prepared by three recent MBA graduates for the acquisition of a canoe manufacturing firm in New Brunswick. Students are required to evaluate the proposal, completing any information needed and to decide whether they would invest in the business.

NEW BRUNSWICK, CANOES, ACQUISITION, 1975

KNIGHT RM. CAWKER G.

UNIVERSITY OF WESTERN ONTARIO, 26p

61054
COFFEES OF THE WORLD (A)

The case describes a proposal for a specialty shop retailing coffees, teas, brewing equipment and accessories in London, Ontario. It is the format for a chain of such stores to be eventually planned for other centres. Students are asked to evaluate the market, the proposed operation and financing for the venture.

ONTARIO, COFFEE CHOPS, NEW BUSINESS, 1975
KNIGHT RM.
UNIVERSITY OF WESTERN ONTARIO, 26p

61055
COFFEES OF THE WORLD (B)

The B case deals with the expansion of the firm from the one store started in London. Options include company owned stores opened gradually, franchising the concept and the acquisition of a chain of similar stores in Toronto. Students are required to evaluate each option pro and con and to suggest possible sources of financing and management for the firm.

ONTARIO, COFFEE SHOPS, EXPANSION OPTIONS, 1975
KNIGHT RM, ORSER R.
UNIVERSITY OF WESTERN ONTARIO, 9p

61056
HEALTH CARE MANAGEMENT SYSTEMS

The case describes the start of a professional practice management services firm aimed at medical doctors and other health care personnel. Services range from computerized billing to office operations to investment counselling. Problems of marketing and financing these services are raised as well as future directions for expansion.

ONTARIO, HEALTH CARE CONSULTING, NEW BUSINESS, 1975
KNIGHT RM.
UNIVERSITY OF WESTERN ONTARIO, 17p

61057

POP SHOPPES INTERNATIONAL (B)

The case describes the impending public issue of pop shoppes stock in 1975. Students are asked to evaluate the growth of the firm and decide whether they would invest, what additional information they would need and to comment on expansion plans of the firm

ONTARIO, SOFT DRINKS, GOING PUBLIC
KNIGHT RM.
UNIVERSITY OF WESTERN ONTARIO, 21p

61058

DICKIE DEE ICE CREAM (LONDON) LTD.

The case describes the London franchise for the street sale of ice cream from bicycles. The franchisee is faced with several options for expansion including new routes in more distant areas of the city and possible bulk discount sales of ice cream from a depot.

ONTARIO, ICE CREAM RETAIL, 1976
KNIGHT RM. TOWNSEND I.
UNIVERSITY OF WESTERN ONTARIO, 10p

61059

CHALLENGE MILLS LTD.

The case describes a proposal for the acquisition of a carpet firm in Springhill, Nova Scotia. The firm was owned jointly by Industrial Estates Ltd. of the provincial government of Nova Scotia and the federal government's department of Regional Economic Expansion. It had been closed down for a year and several entrepreneurs were attempting to revive it.

ONTARIO, CARPETS, ACQUISITION, 1975
KNIGHT RM.
UNIVERSITY OF WESTERN ONTARIO, 22p

61060

THE LADDER MASTER

The case describes an innovative device used to automatically level a ladder for use on any non-level surface. An entrepreneur is attempting to license the invention from its inventor and start producing and selling the device. Students are asked to help him complete his business plan

ONTARIO, HARDWARE, NEW BUSINESS, 1975
KNIGHT RM.
UNIVERSITY OF WESTERN ONTARIO, 7p

61061

GILBERT ASSOC. LTD. - LIFTRAC

The case describes the development of a new invention called the Liftrac. It is a device which permits one man to single-handedly raise a small boat onto racks on a car to transport it. The problem faced by the inventor is how to go about launching a business to produce and market his product. He hopes to prepare a business plan to obtain both capital and management for the business.

ONTARIO, RECREATION, NEW BUSINESS, 1975
KNIGHT RM, EDGE R.
UNIVERSITY OF WESTERN ONTARIO, 5p

61062

THE WIND BUGGY

Jack Pearce, the Owner/Inventor of the Wind Buggy, is faced with the need to develop a complete business plan which would allow his firm, Simcoe Sailing, to grow into a large scale venture. The issue becomes how to promote a new sport with limited resources. Other decisions to be made include: what pricing policy; which market alternatives and distribution channels to use. Wind Buggy is the trade name for a three wheeled land sailing vehicle carrying one passenger suitable for competitive racing.

ONTARIO, RECREATION, NEW BUSINESS, 1976
KNIGHT RM, ORSER R.
UNIVERSITY OF WESTERN ONTARIO, 6p

61063

PRE-CONFEDERATION FURNITURE

The case describes the initial planning for the formation of the firm, Pre-Confederation Furniture. It was formed to manufacture authentic antique reproductions of early Canadian furniture.

ONTARIO, FURNITURE, NEW BUSINESS, 1973

KNIGHT RM. EDGE R.

UNIVERSITY OF WESTERN ONTARIO, 18p

61064

PRE-CONFEDERATION FURNITURE - WINNIPEG FRANCHISE

The case describes a proposal for a franchise with Pre-Confederation Furniture, a firm manufacturing antique reproductions of early Canadian furniture. The franchise would assemble, finish and retail the furniture in the Winnipeg area and would be run independently by one individual initially.

MANITOBA, FURNITURE, NEW BUSINESS, 1976

KNIGHT RM. EDGE R.

UNIVERSITY OF WESTERN ONTARIO, 10p

61065

COFFEES OF THE WORLD (C)

The case describes the negotiations of the first franchise for the Coffees of the World chain. Terms are discussed from both points of view of franchisee and franchisor. The question of additional terms for negotiation is raised and discussion of alternatives to terms suggested.

ONTARIO, COFFEE SHOPS, FRANCHISE, 1976

KNIGHT RM, ORSER R.

UNIVERSITY OF WESTERN ONTARIO, 4p

61066

MODULOC CONCRETE PRODUCTS

The case describes the formation of a company to product and market an innovation in the design and construction of manholes and catch basins in the construction industry. An innovative concept of producing the moduloc interlocking system, as the product is called, is described by the use of "Gypsy" plants which move from place to place. The firm is attempting to raise funds for expansion.

ONTARIO, MANHOLE CONSTRUCTION, NEW BUSINESS, 1977

KNIGHT RM, EDGE R.

UNIVERSITY OF WESTERN ONTARIO, 19p

61067

ROPECRAFTS (A)

The case describes the efforts of a recent MBA graduate to raise expansion financing for a small firm.

ONTARIO, PLANT, HANGERS, BUSINESS EXPANSION, 1977
KNIGHT R.M., EDGE R.
UNIVERSITY OF WESTERN ONTARIO, P.

61068

THE SECURITY BAR

The case describes the efforts of an inventor to commercialize a new device for locking a door from inside to prevent entry

ONTARIO, DOOR LOCKS, BUSINESS STARTUP, 1977
KNIGHT R.M., EDGE R.
UNIVERSITY OF WESTERN ONTARIO, 7p

61069

ROPECRAFTS (B)

The case describes the potential acquisition of a bankrupt ceramics supplier.

ONTARIO, CERAMIC PRODUCTS, SUPPLIER ACQUISITION
1977
KNIGHT R.M., REECE P.I.
UNIVERSITY OF WESTERN ONTARIO, p.

RELEVANT ORGANIZATIONS

ATLANTIC REGION MANAGEMENT TRAINING CENTRE

P.O. Box 1000
Halifax, N.S.
B3J 2X4

BUSINESS WARRIORS

Suite 506
122 St. Patrick Street
Toronto, Ontario
M5T 2X8

FEDERAL BUSINESS DEVELOPMENT BANK - MANAGEMENT SERVICES

P.O. Box 6021
Montréal, Québec
H3C 3C3

INTERNATIONAL COUNCIL FOR SMALL BUSINESS

c/o Robert O. Bauer
University of Wisconsin
929 North Sixth Street
Milwaukee, Wisconsin 53203
U.S.A.

INTERNATIONAL SYMPOSIUM ON SMALL BUSINESS

10232 Robin Hood Circle
Villa Park, California 92667
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NEWFOUNDLAND INSTITUTE FOR MANAGEMENT ADVANCEMENT AND TRAINING

P.O. Box 9554
St. John's, Newfoundland
A1A 2Y4

SMALL BUSINESS SECRETARIAT

Industry, Trade and Commerce
8th Floor East
235 Queen Street
Ottawa, Ontario
K1A 0H5

SOCIETY OF MANAGEMENT ACCOUNTANTS

P.O. Box 176
154 Main Street West
Hamilton, Ontario
M5H 2A4

DEPARTMENT OF BUSINESS DEVELOPMENT AND TOURISM
Regional Development Branch
14th Floor, Capital Square Building
10065 Jasper Avenue
Edmonton, Alberta
T5H 0H4

MINISTRY OF SMALL BUSINESS AND TOURISM
Suite 315, Robson Square
800 Hornby Street
Vancouver, B.C.
V6Z 2C5

DEPARTMENT OF ECONOMIC DEVELOPMENT
Human Resource Management
501, 155 Carlton Street
One Lakeview Square
Winnipeg, Manitoba
R3C 0V8

DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM
Government of the Northwest Territories
Yellowknife, N.W.T.
X1A 2L9

DEPARTMENT OF TOURISM
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Don Mills, Ontario
M3B 3J1

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