

TEACHING NOTES

David Noe: Global Business

Appropriate Grade Levels: 6 – 12 (This lesson can be used on its own or as the start of a larger research project and/or career exploration)

Implementation Time:

One class period (45 minutes to one hour).

Materials Needed:

Teaching notes for “David Noe” case study

Student copies of “David Noe”

Notepaper for small groups to use when brainstorming answers

Career Pathway: Business & Management

Subject Area: Social Studies

What will happen for learners as a result of this lesson?

Students will explore a career opportunity in international trade. They will learn the basics of how to think about, research, and then conduct business with people from another country. They will review the process of conducting research, collecting information, and then synthesizing it for others. Through the assignments suggested with this lesson, students will demonstrate technical writing and will synthesize what they have learned into oral presentations.

How will students learn?

- **Communication:** Students will demonstrate listening and observation skills to gain understanding; will practice communicating ideas clearly and effectively; will demonstrate communication strategies and skills to work effectively with others; and will analyze how communication is used in career settings.
- **Writing:** Students will practice writing clearly and effectively in a variety of forms for different audiences and purposes. Students will practice writing for career applications, producing technical and non-technical documents using resources from career settings.
- **Economics:** Students will observe major forms of business and related careers, comparing the different roles and responsibilities people hold within a business organization. Students will examine the importance of international trade and will investigate the interrelationships between Washington State’s economy and other economic regions.

How will this lesson plan prepare students to be assessed? This lesson plan will help prepare students for reading, writing, and listening assessments. The oral presentations will give students an opportunity to demonstrate their ability to synthesize and use information they have heard.

TEACHING NOTES

David Noe: Global Business

Procedure:

This lesson is designed to be taught in one session.

1. *Distribute the students' version of the "David Noe" case study to your class. Divide the students into groups of three or four.*
2. *Read aloud to them or let them read one section of the case study at a time. Don't let them read ahead. After each section, ask each group of students to brainstorm what David should do. Then, use the questions in the teachers' version of the case study to guide them through a discussion of what David should do at each point.*
3. *Finish by asking each student to complete the in-class writing exercise. If you desire, students can spend another class period preparing for and then presenting their work on the group communication exercise.*

Closure/Assessment:

Review students' written and/or oral work both for basic writing or presentation skills, as well as for students' ability to explain the steps David took to learn more about his customer and the culture of the customer's homeland.

Then, in small groups or as a whole group, have students review the steps they should follow when they are confronted with a problem and don't have enough information to decide what to do. Ask them to share personal experiences of having to conduct research to solve a problem. What did they do? How did they use the information they gathered? What did they do right or wrong? What would they do if they were confronted with the same problem today?

David Noe: Global Business

Part One - *Read to the bottom of the next page then stop.*

David Noe knew he and his team were going to have to learn a whole new way of doing business.

David Noe was the Vice President of Global Sales for APL Limited, the fifth largest shipping company in the world. With its fleet of 76 huge container ships, APL carried goods to and from port cities all over the world. APL then moved those goods by truck or train to their final destinations. In addition to moving goods for its customers, APL could also store goods in its warehouses and could help its customers manage all the ‘logistics’ or details of moving products across borders and over oceans.

David had worked for APL since 1985 in APL offices in Hong Kong, Korea, and the U.S. The group he now managed – the Global Sales Department – had been created in 1996 to serve a new kind of APL customer: the global business. These ‘global’ customers were mostly Fortune 500 companies that had expanded from a single location to have offices, factories, and employees in cities and countries all over the world. A single global business might have offices in four different continents and might move its products between factories and warehouses that were located thousands of miles apart. These businesses needed extra help and attention to coordinate all their shipping and logistics needs between all their various offices and facilities. David’s group was charged with providing that service and handled over \$800 million in business a year for those customers.

David’s team members were a little different from a typical sales representative. Instead of arranging single shipments for a customer – say to ship a load of hay from California to Japan – David’s team worked with people at the very highest levels of global companies, helping them use APL’s services in every

TURN PAGE AND KEEP READING

part of their business. Because of the way they did their work, David and his team spent a lot of time building personal relationships with their customers. And, because their customers worked at businesses all over the world, David and his team learned a lot about different cultures, customs, and business practices. A sales presentation that would be perfectly appropriate for an American customer would not go over well at all in China or in Europe.

David was proud of the work his team did around the world. But now he had a new challenge. One of APL's customers was changing the way it did business and that would certainly change the way this customer worked with APL.

STOP

David Noe: Teaching Notes for Part One

Make sure students know what David does for a living. How do they think a business that makes its living shipping goods for other companies would work? Students may want to access APL's web site at www.apl.com to learn more.

The case study noted that David works with people from all over the world. Ask students how they would prepare to work with someone from another country. What would they do to make sure they behaved appropriately in another culture?

Students may answer that they would want to get information:

- *About the business they are working with, so that they will understand its goals and what it does.*
- *About doing business in another country, to make sure they understand cultural practices – such as how business meetings are conducted or how sales presentations should be made.*

Ask them how they would get this kind of information. Students may suggest many sources of information including the Internet, the library, etiquette and culture guidebooks, and colleagues who work in other countries.

Part Two - *Read to the bottom of this page, then stop.*

The customer David was thinking about was a large manufacturing company that was based in Japan. The company had branch offices in Europe, Hong Kong and the U.S. Until recently, the managers of each of the company's branch offices made their own decisions based on what would work best in their own regions. That is, the head of the company's Europe office made decisions based on what would work best in Europe; and the head of the office in Hong Kong made decisions that would work best there.

But now, the company wanted to change the way it made decisions. It wanted to create stronger partnerships and more teamwork between its employees and get them to think about their decisions not just in terms of their own regions but in terms of the entire company around the world. To do this, the company decided to pull all its branch office managers into a team and ask them to make decisions together – to move beyond their individual needs in their own offices and look at each decision in terms of how it would affect the entire global operations of the company.

David and his team at APL had already built strong relationships with the managers of each of the company's local offices. They worked with the managers at the Hong Kong office, the Japan office, the Europe office and the U.S. office. But up until now, they had worked with each of these people separately, helping each office with its own individual needs. They didn't know much about the overall global needs of the company; their focus, just like the individual branch office managers had been had been on specific regions not the whole world.

David wondered what his customer's decision would mean for APL.

Should he and his team continue to do business as they always had? After all, they had been very successful working one-on-one with the branch offices. Maybe they could still work that way. Or, should he and his team start doing their job in a new way just like their customer?

STOP

David Noe: Teaching Notes for Part Two

Getting basic information is the first step to take in this or any problem when you don't know enough to solve the problem by yourself.

Prompt the students to discuss David's need for information.

Then, lead them in a discussion of what kinds of information he might need. He needs to understand more about his customer and learn more about business and cultural practices in Japan so that he can determine if his customer's changes are really going to happen.

Part Three - *Read to the bottom of this page, then stop.*

David decided he needed more information before he could make a decision. Would this new way of business really last? Was it going to seriously change the way the customer operated? Or would decisions really continue to be made the way they always had with just a “show” of making decisions by a global team?

David already knew quite a bit about doing business in Japan. He thought about what he had learned from many years of doing business with Japanese customers.

David knew that teamwork, partnerships, personal relationships, and a consensus style of decision-making were all very important and valued traits in Japan. In fact, it was not at all uncommon in Japan to prepare for a business meeting by meeting individually with each of the people who would be at the meeting. At those one-on-one meetings, each person would discuss the decisions or new ideas that would be brought up at the big meeting. That way, there would be no surprises at the big meeting. No one would lose face or be embarrassed by being on the losing end of a big decision, because everyone would already have discussed what was going to happen at the meeting. Patient, careful communications like these and strong personal relationships were very important parts of Japanese culture.

After thinking about everything he knew about doing business in Japan, David concluded that his customer’s new way of doing business was not simply for show. Instead, it was a serious shift in the way the company operated. The company was changing its business style not just to be more focused on the overall company’s global needs but also to mirror Japanese cultural ideals.

David valued his relationship with his customer and with the managers of all of its branch offices. He wanted to maintain good relationships with all of them as the company changed its way of making decisions. And he didn’t want to be left behind. How could he do that?

STOP

David Noe: Teaching Notes for Part Three

David has drawn on years of experience to think about his customer's business decision. What has he learned as he's thought about Japanese cultural practices?

What do the students think David should do? Note their answers, then read on.

Part Four - *Read to the end of this section.*

David realized that his customer was very serious about changing the way it made decisions. The company truly wanted to create more teamwork and think more globally. But David knew the company would still have some trouble as it started to make the changes. Change is always difficult, David knew. In this case, managers located at branch offices thousands of miles away from each other, who were of different nationalities and cultures and had been used to making decisions on their own, were now going to try to come together as a team. They might even be resentful about the changes. It was not going to be easy.

But as David thought about it, he realized that APL might be able to help. Within his team at APL, David realized, he and his staff probably knew more about each of the branch offices – what they were producing, how much they were producing, where they were shipping their products – than any of the individual branch office managers did. His challenge would be to use that knowledge to help his customer coordinate its actions and decisions around the world.

David decided he could use his knowledge and his personal relationships with each of the branch office managers to help the company in its new effort. By helping the branch office managers share information and by serving as a bridge between them, David and his team could help their customer's branch office managers get to know each other and start working together.

It was a new way to work. David felt a little like a coach sometimes, as he explained to the Hong Kong branch office manager what the Europe branch office manager had meant by a comment, or explained to the U.S. branch office manager a little about the shipping challenges the Japan office faced. This wasn't the way he usually worked with customers. But it worked! David and his team strengthened their relationships with the company by helping the branch office managers learn more about each other and about how to work as a team. And in the process, he and his staff learned a lot more about their customer and its needs around the world. Their own change in focus from meeting individual managers' needs to thinking about their customer as a team made up of people around the world had paid off. And, David thought with satisfaction, APL's ability to truly meet the needs of its customer gave it an edge in the shipping business.

David Noe – Teaching Notes for Part Four

In-class writing exercise

Ask each student to pretend that they are David Noe and that they have to explain the new strategy APL is going to take to help its customer. Please prepare a three paragraph e-mail from David to his team members. Each paragraph should have between four and six sentences, and should use good sentence and paragraph outline structure. The e-mail should include:

- *A description of the changes the customer is making*
- *The reasons David thinks this change is a serious one*
- *David’s recommendation for what the APL Global Sales group should do*

Teachers: give students approximately 15 minutes to complete the writing exercise using material gained from the case study. You may want to ask several students to read their “e-mails” aloud.

An answer key follows on the next page. Several longer-term assignment suggestions follow on the page after that.

David Noe – In-class writing exercise: ANSWER KEY

E-mail communication

*To: Members of APL Global Sales Group
From: David Noe
RE: Changes at our customer*

One of our customers, a multinational electronics company that is headquartered in Japan, has decided to make some big changes in the way it makes decisions. Currently, the company's branch office managers in Japan, Hong Kong, Europe, and the U.S. make their own decisions. However, the company has decided that in an effort to build teamwork, all decisions will now be made at company headquarters in Japan. Branch office managers will participate in these decisions, but will no longer have the authority to make their own decisions.

Teamwork, personal relationships, and consensus-style decision making are all very important and valued traits in Japan. Because these things are so important in Japanese culture, I have concluded that the changes our customer is making are very serious and not likely to be just for "show." Instead, I think the customer is trying to dramatically restructure the way it does business to bring itself more in line with deeply held Japanese norms and cultural practices.

These changes result from deeply held values but will still be very difficult for our customer to put into practice. Most of the branch office managers do not know each other very well and do not know much about each other's businesses. I would like to have our group help them. Let's see what we can do to serve as a bridge between the branch office managers as they start to function as a team. We can help them learn more about each other and about their different business needs. I'll be watching this customer closely, so please keep me up to date on your dealings with the branch office managers. Thanks.

David Noe: Longer Term Assignments

Assignment OPTION One – Written research exercise

Pick any non-North American country and research business customs in that country. Write a two-page essay with tips for people who want to do business in that country. Topics to consider: the importance (or non-importance) of punctuality, appropriate business dress, customs for greeting people, appropriate and inappropriate business gifts, etc. Use the Internet or the library to help you get started.

Assignment OPTION Two – Written research exercise

Use newspaper or newsmagazine archives to find an example of a business deal conducted between an American company and a business from another country. Prepare a one-page summary of the deal, noting what is being bought or sold and providing as much information as you can learn about how the deal was put together, how long it took, and who was involved.

Assignment OPTION Three – Group communication exercise

Divide the students into small groups of three to five. Ask half the groups to pretend they are making a presentation about APL's shipping services to an American company. Ask them to prepare a 2-3 minute presentation about why the American company should use APL to ship its hay to China.

Ask the remaining groups to pretend they are making a presentation about APL's shipping services to a Japanese company. Ask them to prepare a 2-3 minute presentation about why the Japanese company should use APL to ship its electronics products to the U.S.

Ask students to draw on what they learned from the case study in making their presentations. The presentation to the American company can be straightforward; it can reflect pride, even a bit of boastfulness about APL's services; it can expect a decision right away. The presentation to the Japanese company, on the other hand, should be much more humble and down-to-earth. It should reflect a great deal of respect for the people in the Japanese company, and should be designed simply as a prelude to a longer term relationship – and eventual business deal – with them.