

PD-ABI-346

## **Second Quarter Report**

**January 1 - March 31, 1994**

### **Center for Business Excellence Management Training for Romania**

**Grant EUR-0029-G-00-3050-00**

**WASHINGTON STATE UNIVERSITY  
and  
UNIVERSITATEA "POLYTEHNICA" DIN  
BUCURESTI**

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**CENTER FOR BUSINESS EXCELLENCE**  
**Polytechnic University of Bucharest**  
**and**  
**Washington State University**

The second quarter of the Center for Business Excellence project in Romania marked the full implementation of the management training program for state-owned enterprises anticipating privatization. While training at two sites -- Bucharest and Timisoara -- had begun in November of 1993, it was not until early February that training began in Craiova. Fourteen of the fifteen companies originally enrolled in the management training for privatization (MTP) program continued in the second quarter.

The Romanian winter was kinder to the program after an extremely cold November -- the coldest in 100 years -- and work was able to progress on the building which is to house the Center for Excellence. The facility is now scheduled for completion May 1, 1994. The classroom in a building adjacent to the Center for Excellence was completed in February and was utilized for MTP training, counselor training, and general SME seminar presentations. It is without question the finest classroom at the Polytechnic University of Bucharest, and quite likely the nicest facility in Romania.

As a result of the classroom renovation, faculty from the UPB who were previously lukewarm to the idea of strengthening the department of management are becoming strong supporters of the activities. It is difficult to determine whether their reasons are selfish ("If we are supportive, maybe they will let us use the classroom!") or the result of re-education ("There must be something to this management idea if they can get classrooms like this!") Whatever the reason, there has been much stronger campus-wide support for the programs in management training.

## **Staff**

Ann Schaechtel, originally a CDC volunteer and later a business development specialist, left the program at the end of December, having fulfilled her commitment to Washington State University. She did an outstanding job in the program, in counselor training, seminar presentation, and in providing the initial impetus to the Romanian case book development program. Her contributions to the overall project were invaluable.

As outlined in the PIP, two new WSU faculty joined the program in the second quarter, in addition to two MBA students.

Peter Quist joined the program on January 15. The son of a former USAID employee, Peter spent several years overseas while growing up. After completing his BA at the University of Washington in 1973, he taught and worked in private business. He established his own successful small business and operated it for ten years before selling it in 1993. His recent business experience has provided him with insights which have greatly strengthened the program. Peter coordinates the Craiova outreach in the MTP program and, together with one of the MBAs, works with companies in the MTP program in Bucharest, Timisoara, and Craiova..

Alma Golazeski joined the program February 1. Holding both an MBA and JD degree, Alma was selected as a Fulbright-Hays Scholar to the American University in Bulgaria in 1992. She has twelve years experience in program management and strategic planning at The Boeing Company in Seattle. She possesses expertise in management information systems. Alma works with one of the young MBAs as a team providing on-site assistance to firms involved in the MTP program. She has also taken the lead in the Romanian case book initiative.

William J. ("Willie") Fronk (MBA 1993 - WSU) and Eustace Fernandez (MBA 1994 - WSU) began their participation in the project on January 15. They were able to begin work almost

immediately and identified those areas within each state-owned enterprise involved in the MTP program where they could provide direct assistance. Their participation has not only strengthened the project in Romania but is providing an opportunity to see firsthand an economy in transition.

Peace Corps Volunteers manage the SME Centers in Timisoara and at the Academy of Economic Studies in Bucharest, providing the needed American presence on a day-to-day basis, and also participating in the MTP and counselor training programs. Sarah O'Neill is the American director of the SME Center at the Academy of Economic Studies, and Jim Marten at the Chamber of Commerce and Industry SME Center in Timisoara. They have provided the continuity to the program which will eventually lead to sustainability. The Chamber in Timisoara, for example, has already indicated that it will continue the Center once funding is no longer available from outside sources. They have already contributed considerable match to the project.

### **Counselor Training**

Counselor training continued at all centers established with USAID funding: Polytechnic University of Bucharest, Academy of Economic Studies, Timisoara, and Craiova. In addition, CRIMM (the PHARE program for SME Development) selected Washington State University and the Center for Business Excellence faculty to provide training to the counselors they selected to staff new offices opened in that program.

Master level certification training began in Bucharest, with trainees coming from Craiova and Timisoara as well; and professional level certification continued at all sites. Fifteen Romanian counselors are participating in the Master level program. (Master Business Counselor certification indicates that the counselor is qualified to train other counselors, in addition to providing direct business assistance to companies and individuals.)

A total of fifteen (15) participants have been certified as Professional Business Counselors, and approximately fifty-five others are involved in the certification process at one level or another. The Center at Timisoara is particularly active, as is the Polytechnic University of Bucharest, naturally. With the exception of nine counselors, all or donating time to the program -- averaging some 40% FTE.

## **DISAPPOINTMENTS**

Renovation work on the Center for Business Excellence has taken much longer than we had hoped, and longer than had been promised to us by the Romanian directors of the program. Nevertheless, other Westerners tell us that the work is proceeding much faster than the work they have had done in the past.

The full opening of the Center for Business Excellence was originally scheduled for the middle of April 1994, but has now been postponed until June 15 when both Ambassador Davis and USAID Country Director Richard Hough will be in Bucharest. The Center is to be ready for occupancy by mid-May.

The inability of Romanian counselors and trainers to play a greater role in the MTP (Management Training for Privatization) program has been disappointing. Full participation by selected counselors is still six months away.

Highlights of the project for the 2nd Quarter are found in Section 2, a listing of accomplishments of each program trainer. The listing gives an excellent overview of the breadth of the WSU program and the number of agencies, businesses, and individuals it is reaching.

## **Institution Building**

- \* Organized construction team meetings that end with clarification of what will be done when and by whom
- \* Started discussions with Chamber of Commerce and Industry of Timisoara on ways to improve the counseling skills of their own counselors using SMEDC expertise so that they can staff Centers upon termination of USAID funding.
- \* Initial discussions on arrival of computers, equipment, and supplies from U.S. for CFE in Bucharest..
- \* Presentation in Bucharest & Timisoara on how to prepare, format, and present overheads for a presentation.
- \* Creation of training and counseling material (case study)
- \* Continued to emphasize with the center director the importance of a professional office appearance
- \* Opened discussions with local Chamber of Commerce regarding joint cooperation on upcoming seminars for Loan Guarantee Fund and trade with the United States.
- \* Continued discussions with Romanian Development Agency regarding improved communication and information systems.
- \* Met counselors/faculty members involved in the program and established a basic framework for working together on specific companies.
- \* On-going process: continued clarification of "what is quality" and "who is accountable" for work on CM Building (i.e., Center for Business Excellence).
- \* Developed a working relationship with the Center at Craiova for the Management Training program.
- \* Improved counselor capacity by working with Romanian counselors (in Bucharest and Timisoara) to assist the privatizing firms.
- \* Further discussion on arrival of computers, equipment, and supplies from U.S. for CFE in Bucharest, issues: security, insurance, and maintenance.
- \* Presentation in Bucharest & Timisoara on competition and self analysis

- \* Worked with counselors-in-training on the creation of training materials
- \* Explained the purpose of the survey to various counselors in Timisoara and Bucharest. Explained how they could also use the information gathered to better understand their clients.
- \* Introduced counterpart personnel to Peace Corps staff and other NGOs working in the field at a Peace Corps sponsored training seminar.
- \* Discussed with center director future center relocation plans and possible actions that may need to be considered (advertising, moving expenses, when moving back?, etc.).
- \* Prepared overview of SME sector that was provided to center staff and shared with WSU team members.
- \* Guided RDA (Romanian Development Agency) toward taking a more active leadership role in the coordination of the two-day banking seminars.
- \* Assisted in preparations for the Vice-Rector's trip to the United States and in discussions on a student exchange program with the Rector and Management Department.
- \* Maintained close contact with construction advisors and Vice-Rector on completion of renovation of building CM.
- \* Completed an agreement with President of the Chamber of Commerce and Industry in Timisoara to train CCIT counselors using the PBC training program.
- \* Arranged and attended meetings with personnel from the Chamber of Commerce Trade Registry and Coopers and Lybrand.
- \* Attended USAID monthly meeting.
- \* Interviewed by Timisoara radio station regarding the overall project, and specifically the Management Training for Privatization (MTP) program.
- \* Filmed by Timisoara television directing business training seminar.
- \* Coordination of Case Study Project.
- \* Facilitated advancement of FZA (Ministry of Transportation) & FTZ's within Romania.



- \* Creation of training materials (case study and Cost Accounting packet).
- \* Training of Romanian counselors/colleagues (PUB): various business topics; technical computer use; and use of correspondence for communication & coordination.
- \* Explained the purpose of the survey to various counselors in Timisoara and Bucharest. Explained how they could also use the information gathered to better understand their clients.
- \* Held meeting with Peace Corps Project manager and Center Director to discuss ways to increase cooperation on mutual projects.
- \* Discussed with the center director the center business plan and areas that need attention.
- \* Discussed using case studies already presented (one successful, one unsuccessful) as part of the counselor certification process as a basis for creating a center library of Romanian case studies.
- \* Established the Craiova operation for MTP and negotiated agreement among city and university officials on their responsibilities
- \* Marketing of program/increased visibility through radio interviews and TV coverage of training session(s).
- \* Networking and investigation of future cooperative efforts with Chamber of Commerce and Industry of Timisoara, Chamber of Commerce in Bucharest, Romanian Development Agency, Peace Corps, USAID, World Bank Higher Education Project, Cluj Romanian-American Commercial Center.
- \* Increasing emphasis on training managers of privatizing firms while maintaining the excellence of the counselor program.
- \* Completion of the CBE and its future powerful and positive influence on the program's effectiveness and level of acceptance within the academic community (helping to validate the program).
- \* Continuing to work with identified business and ensuring a good working relationship through scheduled and frequent visits.

## Highlights

- \* Coordinated orientation activities for the new members of the American team.
- \* Discussed cooperative programs in Management Training for Privatizing Businesses with:
  - Dipl. Ec. Mihai Fercala, President Director General Brasov Private Ownership Fund
  - Mark Kranz, Deputy Administrator, Office of Economic Restructuring, USAID
  - Mr. Cornel Verescu, General Director, SME Development Romanian Development Agency
  - Kim Hom (for Melissa Brinkershoff) with Colleen Allen Bureau for Europe and NIS, USAID
- \* Negotiated conditions of contract with UNIDO for CBE; part of that contract is to provide training space.
- \* Continued to "push" completion of the Executive Training Room at UPB and to get started on Building CM.
- \* Certified four more Professional Business Counselors in the Center at UPB
- \* Finalized counselor training program/schedule for CRIMM Center counselor training, meeting UNIDO contract requirements.
- \* Selected Romanian instructors for CRIMM training.
- \* Coordinated with American team and taught part of Session 3, Management Training for Privatizing Companies.
- \* Visited companies with counselors (3 in Timisoara and 1 in Bucharest). Did initial status and needs evaluation of companies.
- \* Initial contact and fact finding mission with IPROTEM (Timisoara), Cera-Plast (Timisoara), ROMBETON (Bucharest)
- \* Presentation in Bucharest & Timisoara on how to prepare, format and present overheads for a presentation.
- \* Wrote case study (Rom Furniture), for use in training and counseling.

- \* Met with Romanian (Bucharest & Timisoara) counselors, counterparts, and team members to discuss plan of action and clarify mission plan.
- \* Observed counselor training session in Timisoara.
- \* Orientation meetings with RDA, Peace Corps, ASE, PUB, and SMEC - Timisoara.
- \* Orientation with American colleagues.
- \* Developed and delivered seminar on managerial finance.
- \* Completed needs assessment for series of 2-day banking-finance seminars for entrepreneurs and bankers.
- \* Developed case study curriculum to be used to teach PCV's, Center counselors and clients.
- \* Met with representatives interested in supporting an accredited Special Olympics Program, got approval from Special Olympics International to continue accreditation process.
- \* Attended one week technical language training required by Peace Corps.
- \* Completed preliminary office renovations (new carpeting, furniture, copier).
- \* Prepared counselors for Professional Business Counselor Certification.
- \* Designed and implemented two training courses for managers of privatizing firms.
- \* Involved counseling team in search for participants in USAID funded Partnership International Entrepreneur Training program.
- \* Assisted new American consultants working with local privatizing companies by matching them with local counselors and firms.
- \* Planned and scheduled second series of training workshops for local entrepreneurs.
- \* Met all counselors, faculty and other individuals who are involved in this program.

- \* Discussed with my team members (Peter Quist and Romanian counselor) and agreed on an initial approach for conducting a needs assessment for the companies we assigned to.
- \* Visited three companies (one in Bucharest and two in Timisoara) and conducted an initial needs assessment.
- \* Worked out a timetable for distributing a survey on determining employees attitudes towards work and their responsibilities.
- \* Continued orientation of American team.
- \* Coordinated activities of the American team as they traveled to Timisoara and Craiova.
- \* Discussed cooperative program opportunities with:
  - World Bank Higher Education Project
  - CIMP Know How Fund's Management Training Project
  - Timisoara Chamber of Commerce and Industry
  - Cluj Romanian-American Commercial Center
- \* Negotiated conditions of contract with UNIDO and CRIMM for CBE including training space; assured space for training at UPB until classroom is ready to use).
- \* Used the Executive Training Room on 25 February for management training (handled all last minute glitches).
- \* Signed final contract for CM renovation and started construction team meeting regularly.
- \* Certified the first Professional Business Counselor in the Center at Timisoara.
- \* Supervised training for CRIMM Center counselors with UNIDO, training in Counseling Methodologies.
- \* Evaluated all Romanian instructors during their CRIMM training presentations.
- \* Coordinated American team and taught parts of Sessions 4 and 5, Management Training for Privatizing Companies, in Bucharest and Timisoara.

- \* Started Management Training in Craiova.
- \* Trained the American team to assist in counselor training and co-counseling in Timisoara and Craiova.
- \* Developed and presented topics for Management Training seminars:
  - Planning for growth
  - Selling strategies
  - Distribution strategies
  - Presentation overheads
- \* Assisted 3 Bucharest firms and 3 Timisoara firms in developing investor presentations and overheads.
- \* Evaluated needs at the 6 firms and designed activities to meet those needs- e.g., market orientation, organization, new product development, marketing, financing.
- \* Established administrative structure for company client counseling, including the use of Client Profile and Meeting Minutes forms. Trained MBA intern and SBDC counselors in use of the forms (Timisoara and Bucharest).
- \* Met clients and participated in client counseling with counselors and MBA intern at IPROTIM and Ceramica Crintul (Timisoara) and ROMBETON (Bucharest).
- \* Observed management and counselor training sessions for purposes of program orientation (Timisoara, Craiova).
- \* Began development of workshop, "Development of Human Resources and Personnel Management."
- \* Resumed coordination of Case Studies project and began project management plan.
- \* Meeting with Romanian Free Trade Zone (Government Agency) general focus on FTZ's creation, evaluation, and sustainability.
- \* Meeting with IPROTEM's Chief Accounting, focus on current status of accounting in Romania.
- \* Meeting and training with ROMBETON, regarding preparation of presentation. Also training in computer generation of presentation materials.

- \* Research for the development of training materials.
- \* Meeting with Ministry of Labor and Social Welfare.
- \* Meeting & Training with IPROTEM's (Timisoara) management team, re: current problems and facilitation presentation preparation.
- \* Conducted and observed management training in Timisoara and Bucharest.
- \* Meeting and training with "Cera-Past's" ceramic division. Determined this company is now two separate legal entities.
- \* Research requests and replies, re: state-side and host-country correspondence and information development.
- \* Assisted in development of training material for Romanian Counselor's presentation/training.
- \* Orientation and fact finding mission in Craiova. Further, observed Counselor and management training.
- \* Mission plan refinement with Romanian & American colleagues.
- \* Seven company visits to identify specific areas of assistance.
- \* Developed a sample for company presentations.
- \* Clarified for company managers problem areas in the presentation outline.
- \* Installed Microsoft Powerpoint and began developing presentation outlines for companies, including various graphics and charts.
- \* Had surveys translated and have distributed to various companies in Bucharest and Timisoara. Romanian Counselors in those centers will help distribute to their clients.
- \* Presentations on Customer Service, Employee Training, and Company-Wide Strategies in Timisoara and Bucharest.
- \* Developed material for companies who requested information on developing a marketing plan.
- \* Organized a seminar series for managers of existing businesses.

- \* Developed and delivered a training program in marketing for existing businesses at which a new seminar attendance record was set.
- \* Delivered a training program on organizational and communication strategies as part of the Managing for Change training program.
- \* Graduated our first Certified Professional Business counselor.
- \* Met with student representatives of AISEC to discuss future collaboration projects.
- \* Organized two Peace Corps funded seminars to be held in March and April, 1994.
- \* Recruited seven applicants for the USAID funded Partnership International Program.
- \* Developed and delivered seminar on Financing for Development.
- \* Taught session on financial topics for Timisoara counselors.
- \* Delivered seminar on managerial finance for Timisoara.
- \* Determined dates for banking - finance seminars and scheduled press conference.
- \* Continued co-counseling with center counselors and clients particularly related to CRIMM packages.
- \* Completed quarterly review of ASE, Timisoara, and Criova Center activities.
- \* Discussed additional program opportunities with:
  - Romanian Development Agency
  - Romanian Chamber of Commerce and Industry
  - Peace Corps
  - USAID NGO GAO researchers
- \* Organized "Privatization Training Day" for American Team and Romanian PBCs--Coopers & Lybrand participated.
- \* Assisted in design of the Peace Corps Seminar for Bankers and Entrepreneurs to be held in five sites in Romania.

- \* Presented CBE Center activities to the meeting of the Chamber of Commerce and Industry and the International Bureau of Chambers of Commerce on "How to Help SMEs In Their Marketing - Put The Client Into Market Planning."
- \* Coordinated training in Timisoara, Bucharest for Dr. McCullough and in Timisoara, Craiova and Bucharest for Dr. Maurer from WSU.
- \* Finalized Master Business Counselor training program.
- \* Coordinated American team and taught market research in the Management Training for Privatizing Companies, in Craiova.
- \* Participated at a Peace Corps planning session in Sinaia to increase interaction between Peace Corps, WSU and Centers.
- \* Planned counselor training for CCIT counselors and customer service training for other employees with the President of the Chamber of Commerce and Industry in Timisoara.
- \* Working with Craiova Director, transferred leadership in Craiova project to Peter Quist, WSU BDS.
- \* Developed, wrote, negotiated, and implemented structural organization plan for the Management Training Program in Craiova that covered:
  - Information gathering
  - Negotiation
  - Marketing
- \* Reviewed and evaluated company presentations performed before Dr. McCullough.
- \* Co-counseled at company sites with emphasis on new product development, company marketing, and privatization strategies.
- \* Competed development of workshop, "Development of Human Resources and Personnel Management."
- \* Finalized company presentations for critique by Dr. McCullough.
- \* Developed commitment criteria for project companies.
- \* Counseled small business, re: start-up and strategic issues.



# IMPLEMENTATION STATUS

(Fifty per cent of time elapsed)

<b>Counselor Training</b>	<b>Annual Goal</b>	<b>YTD</b>	<b>%</b>
Professional Business Counselor Certification	30	15	50%
Master Business Counselor Certification	0	0*	0%
 <b>Business Manager Training</b>	 <b>Annual Goal</b>	 <b>YTD</b>	 <b>%</b>
Seminar attendance by business managers (excluding MTP program)	400	446	112%
Seminar attendance by government officials	100	335	335%
Seminar attendance by students	200	290	145%
 <b>Management Training for Privatization</b>	 <b>Annual Goal</b>	 <b>YTD</b>	 <b>%</b>
State-owned enterprises participating	10	14**	140%
Consultation meetings with management teams of enterprises (meetings range from one to eight hours in length)	60	64	107%
Seminar attendance by managers of state-owned firms	1440	1413	98%

\*several counselors have partially completed the training. The goal should be reached by September 30, 1994.

# Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe

Institution: Washington State University

Quarter: Second

Contact Person Regarding  
this Report

Robert L. Tolar

Project Component Management Training

(206) 737-2021

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

X

Not projected by quarter  
(see implementation status)

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	1866		307			Center sites in Bucharest Craiova, and Timisoara
Students (Traditional)	1782		5			
Government Officials	372		39.5			
Business Community/ Business Managers	3705		967			
Journalists - Media						
Other Groups/Individuals Student Contact	594					
Other Groups/Individuals						
Other Groups/Individuals						

COMMENTS:

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: JANUARY 1994  
BY: Katie Reikofski**

**HIGHLIGHTS:**

**Completed**

- \* Coordinated orientation activities for the new members of the American team.
- \* Discussed cooperative programs in Management Training for Privatizing Businesses with:
  - Dipl. Ec. Mihai Fercala, President Director General Brasov Private Ownership Fund
  - Mark Kranz, Deputy Administrator, Office of Economic Restructuring, USAID Wa DC (with Gary Mahar)
  - Mr. Cornel Verescu, General Director, SME Development Romanian Development Agency
  - Kim Hom (for Melissa Brinkerhoff) with Colleen Allen Bureau for Europe and NIS, USAID Wa DC
- \* Negotiated conditions of contract with UNIDO for CBE; part of that contract is to provide training space.
- \* Continued to "push" completion of the Executive Training Room at UPB and to get started on Building CM.

**Planned**

- \* Use the Executive Training Room for training on Feb. 11!
- \* Prepare for Mr. Jantea, President of RDA, a summary of SMEDC Center activities for 1992.
- \* Get contract signed for work on Building CM; identify UPB support and schedule regular meetings with all parties.
- \* Assist in preparing Master Business Counselor trainees for participation in the CRIMM counselor training program.

**INSTITUTION BUILDING:**

- \* Organized construction team meetings that end with clarification of what will be done when and by whom.

**SUSTAINABILITY:**

- \* Assisted CBE and UPB in negotiating a contract with conditions that they could fulfill.

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	25 hours	6 hours
Students	hours	hours
Government Officials	7 hours	hours
Business Community	30 hours	4 hours
Other Groups	hours	hours
Project Prep Time	12 hours	2 hours

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: JANUARY 1994  
BY: David Reikofski**

**HIGHLIGHTS:**

**Completed**

- \* Certified four more Professional Business Counselors in the Center at UPB
- \* Finalized counselor training program/schedule for CRIMM Center counselor training, meeting UNIDO contract requirements.
- \* Selected Romanian instructors for CRIMM training.
- \* Coordinated with American team and taught part of Session 3, Management Training for Privatizing Companies.

**Planned**

- \* Develop counselor training program (per request) for Chamber of Commerce and Industry of Timisoara.
- \* Train American team to assist in counselor training and co-counseling in Timisoara and Craiova.
- \* Start Management Training in Craiova.

**INSTITUTION BUILDING:**

- \* Started discussions with Chamber of Commerce and Industry of Timisoara on ways to improve the counseling skills of their counselors using SMEDC expertise.

**SUSTAINABILITY:**

- \* Developed program guidelines for CRIMM counselor training which can be used in any contract for counselor training.
- \* Started to train Master Business Counselor trainees to teach them counseling methodologies.

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	56 hours	4 hours
Students	hours	hours
Government Officials	hours	hours
Business Community	91 hours	56 hours
Other Groups	hours	hours
Project Prep Time	14 hours	5 hours

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**

**ROMANIA PROJECT ACTIVITY JAN 16-31 1994**

BY: PETER QUIST

**HIGHLIGHTS:**

**Completed**

- \* VISITED COMPANIES : 3 TIMISOARA
- \* WITH COUNSELORS 1 BUCHAREST

INITIAL STATUS & NEEDS EVALUATION OF COMPANIES

**Planned**

- \* FOLLOWUP WITH ABOVE COMPANIES
- \* INITIAL VISITS WITH 2 OTHER BUCHAREST COMPANIES

**INSTITUTION BUILDING:**

- \* INTRODUCTIONS AND MEETINGS WITH COUNSELORS AT BOTH LOCATIONS
- \*

**SUSTAINABILITY:**

- \* DISCUSSED COMPANY MEETINGS WITH COUNSELORS TO ESTABLISH FUTURE GOALS OF COUNSELING
- \*

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty	hours	10 hours
Students	hours	hours
Government Officials	hours	hours
Business Community	hours	22 hours
Other Groups	hours	hours
PREP TIME	3 HRS	

PROJECT  
~~REPORT~~

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY JANUARY 1994  
BY: WM. J. FRONK

**HIGHLIGHTS:**

**Completed**

- \* Initial contact & fact finding mission with IPROTEM (Timisoara)
- \* Initial contact & fact finding mission with Cera-Plast (Timisoara)
- \* Initial contact & fact finding mission with ROMBETON (Bucharest)
- \* Presentation in Bucharest & Timisoara on how to prepare, format and present overheads for a presentation.
- \* Wrote case study (Rom Furniture), for use in training and counseling.
- \* Met with Romanian (Bucharest & Timisoara) counselors, counterparts, and team members to discuss plan of action and clarify mission plan.
- \* Observed counselor training session in Timisoara.
- \* Orientation meetings with RED, Peace Corps, ASE, PUB, and SMEC - Timisoara.
- \* Orientation with American colleagues.

**Planned**

- \* Company visits in Bucharest & Timisoara in early February to assist in preparation of their presentation.
- \* Exploration of Disney purchase (product), contact and/or venture with Cera-Plast (Timisoara).

**INSTITUTION BUILDING:**

- \* Initial discussion on receipt of computers, equipment, and supplies from US for CFE in Bucharest.
- \* Presentation in Bucharest & Timisoara on how to prepare, format, and present overheads for a presentation.
- \* Creation of training & counseling material (case study).

**SUSTAINABILITY:**

- \* Initial contact made with Romanian & American colleagues in Bucharest & Timisoara. Discussions on mission plan & plan of action.
- \* Preparation & creation of training materials to be used for future projects and training sessions.

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty	28.5 hours	18.5 hours
Students	0 hours	0 hours
Government Officials	0 hours	0 hours
Business Community	37.5 hours	84.0 hours
Other Groups	0 hours	0 hours
Project Prep Time	9.0 hours	0 hours

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY JAN 1994  
BY: EUSTACE FERNANDEZ

**HIGHLIGHTS:**

**Completed**

- \* Since my arrival on the 15th of Jan, I've met all the counselors, faculty, and other individuals who are involved in this program.
- \* I have discussed with my team members (Peter and Romanian counselor) and agreed on an initial approach for conducting a needs assessment for the companies we were assigned to.
- \* Visited three companies (one in Bucharest and two in Timisoara) and conducted an initial needs assessment.
- \* Worked out a timetable for distributing a survey on determining employees attitudes towards work and their responsibilities.

**Planned**

- \* Plan to visit the remaining companies in Bucharest and conduct a needs assessment.
- \* Plan to participate actively in the training for managers.
- \* Plan to begin distribution of surveys to various companies.
- \* Plan to write an article for the MBA Association newsletter describing my experience in Romania.
- \* Plan to establish some ties with student organizations.

**INSTITUTION BUILDING:**

- \* Met counselors/faculty members involved in the program and established a basic framework for working together on specific companies.

**SERVICES PROVIDED:**

Counselors/Faculty  
Students  
Government Officials  
Business Community  
Other Groups

Training

Counseling

6 hours

10 hours

TO: Robert ~~Tolar~~<sup>TOLAR</sup>, WSU SBDC International Programs, Vancouver

FROM: Jim Marten, PCV, Timisoara Small Business Development Center

### ACTIVITY REPORT FOR JANUARY 1994

<u>HOURS:</u>	<u>Mgmt Training</u>	<u>Consultation</u>
Faculty/Trainers	14	12
Students	-	-
Gov. Officials	-	6
Business Managers	51	26
Others	6	5

#### ACTIVITY HIGHLIGHTS

##### Completed

- \* Completed preliminary office renovations ( new carpeting, furniture, copier)
- \* Prepared one counselor for Professional Business Counselor Certification
- \* Designed and implemented two training courses for managers of privatizing firms
- \* Involved counseling team in search for participants in USAID funded Partnership International Entrepreneur Training program
- \* Assisted new American consultants work with local privatizing companies by matching them with local counselors and firms.
- \* Planned and scheduled second series of training workshops for local entrepreneurs

##### Planned

- \* Continue with counselor training and co-counseling to prepare them for Certification
- \* Open discussions with AIESEC (local student group) to assist with Center activities
- \* Organize and promote two Peace Corps/USAID funded seminars on banking and MFN
- \* Initiate information referral system to assist Center clients in locating targeted assistance

#### INSTITUTION BUILDING

- \* Opened discussions with local Chamber of Commerce regarding joint cooperation on upcoming seminars for Loan Guarantee Fund and trade with the United States
- \* Continued discussions with Romanian Development Agency regarding improved communication and information transfer systems

#### SUSTAINABILITY

- \* Developed a standardized procedure for organizing and implementing seminars that can be used in the future by Center personnel
- \* Continued counselor training for Certification as to allow Center counselors to train themselves in the future



TO: Robert Tolar  
SBDC International Programs, WSU Vancouver

FROM: Sarah O'Neill  
SNEC, ASE, București

**ASE CENTER ACTIVITY REPORT  
FOR JANUARY 1994**

	Training hours	Consultation hours
Faculty/Counselors	13	17
Students	-	-
Government Officials	12	-
Business Community	18 <	12
Other	10	-
Seminars (Put in "Business Community")	10	-
Center Client Mtgs. (Put in "Business Community")		89

**HIGHLIGHTS:**

**Completed:**

- \* Developed and delivered seminar on managerial finance.
- \* Completed needs assessment for series of 2-day banking-finance seminars for entrepreneurs and bankers.
- \* Developed case study curriculum to be used to teach PCV's, Center counsellors and clients.
- \* Met with representatives interested in supporting an accredited Special Olympics Program, got approval from Special Olympics International to continue accreditation process.
- \* Attended one week technical language training required by PC.

**Planned:**

- \* Develop a seminar on financing for development.
- \* Bring all the interested parties together to determine dates etc. for the series of 2-day banking-finance seminars.
- \* Continue to be available as a resource to center staff.
- \* Continue to meet with people interested in Special Olympics and maintain contacts with Special Olympics International.

**INSTITUTION BUILDING:**

- \* Continued to discuss with the center director the importance of a professional office appearance (furniture).

**SUSTAINABILITY:**

- \* Co-counseled with counsellors both at ASE and the Politechnic specifically related to finance/banking issues.
- \* Discussed with center director the importance of advertising for the seminars offered at the center in order to insure maximum attendance and to reach more prospective clients.
- \* I personally find the number of client meetings reported for January hard to believe based on the activity I was aware of in the center.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: FEBRUARY 1994  
BY: Katie Reikofski**

**HIGHLIGHTS:**

**Completed**

- \* Continued orientation of American team.
- \* Coordinated activities of the American team as they travelled to Timisoara and Craiova.
- \* Discussed cooperative program opportunities with:
  - World Bank Higher Education Project
  - CIMP - Know How Fund's Management Training Project
  - Timisoara Chamber of Commerce and Industry
  - Cluj Romanian-American Commercial Center
- \* Negotiated conditions of contract with UNIDO and CRIMM for CBE including training space; assured space for training at UPB until classroom is ready to use.
- \* Used the Executive Training Room on 25 February for management training (handled all last minute 'glitches.')
- \* Contract is signed for CM and team is meeting regularly.

**Planned**

- \* Start formal program for Master Business Counselor certification.
- \* Review project activities with staff from all Centers.
- \* Prepare for Mr. Jantea, President of RDA, a summary of SMEDC Center activities for 1992.

**INSTITUTION BUILDING:**

- \* On-going process: continued clarification of "what is quality" and "who is accountable" for work on CM.

**SUSTAINABILITY:**

- \* Executive Training Room is open; UPB Counseling Center can now offer workshops to business clients.

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	18 hours	3 hours
Students	hours	hours
Government Officials	58 hours	11 hours
Business Community	62 hours	hours
Other Groups (eg NGOs)	35 hours	10 hours
Project Prep Time	31 hours	hours

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: FEBRUARY 1994  
BY: David Reikofski**

**HIGHLIGHTS:**

**Completed**

- \* Certified the first Professional Business Counselor in the Center at Timisoara
- \* Supervised training for CRIMM Center counselors with UNIDO, training in Counseling Methodologies.
- \* Evaluated all Romanian instructors during their CRIMM training presentations.
- \* Coordinated American team and taught parts of Sessions 4 and 5, Management Training for Privatizing Companies, in Bucharest and Timisoara.
- \* Started Management Training in Craiova.
- \* Trained the American team to assist in counselor training and co-counseling in Timisoara and Craiova.

**Planned**

- \* Work with the UPB Counseling Center to develop and market a workshop series for entrepreneurs and start utilizing the new training facility.
- \* Start a seminar series in Craiova for business owners and managers and the counselors.
- \* Finalize the Master Business Counselor criteria, select candidates, and schedule training.

**INSTITUTION BUILDING:**

- \* Continued discussions with Chamber of Commerce and Industry of Timisoara about counselor training to improve the counseling skills of their counselors.

**SUSTAINABILITY:**

- \* Finalized program for CRIMM counselor training; completed the Counseling Methodologies Manual; and trained Master Business Counselor trainees to teach them.

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	211 hours	8 hours
Students	hours	hours
Government Officials	hours	hours
Business Community	86 hours	6 hours
Other Groups	hours	hours
Preparation	46 hours	2 hours

25

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY FEBRUARY 1994  
BY: PETER QUIST**

**HIGHLIGHTS:**

**Completed**

- \* Developed and presented topics for Management Training seminars:
  - Planning for growth
  - Selling strategies
  - Distribution strategies
  - Presentation overheads
- \* Assisted 3 Bucharest firms and 3 Timisoara firms in developing investor presentations and overheads
- \* Evaluated needs at the 6 firms and designed activities to meet those needs--eg. market orientation, organization, new product development, marketing, financing

**Planned**

- \* Schedule activities in Craiova for the Management Training for Privatizing Companies program
- \* Develop counselor training program for Craiova to increase counselor capacity to assist privatizing businesses
- \* Provide hands-on assistance to help firms write a mission statement and develop marketing plans

**INSTITUTION BUILDING:**

- \* Developed a working relationship with the Center at Craiova for the Management Training program
- \* Improved counselor capacity by working with Romanian counselors (in Bucharest and Timisoara) to assist the privatizing firms

**SUSTAINABILITY:**

- \* Developed materials for and presented seminars for business owners and managers at ASE and in Timisoara; trained Romanian counselors who will teach the next sessions

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	24 hours	16 hours
Students	hours	hours
Government Officials	hours	hours
Business Community	69 hours	50 hours
Other Groups	hours	hours
Project Preparation	14 hours	20 hours

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER, WA  
ROMANIAN PROJECT ACTIVITY FEBRUARY 1994  
BY: ALMA GOLAZESKI

HIGHLIGHTS:  
Completed

- \* Established administrative structure for company client counseling, including the use of Client Profile and Meeting Minutes forms. Trained MBA intern and SBDC counselors in use of the forms (Timisoara and Bucharest).
- \* Met clients and participated in client counseling with counselors and MBA intern at IPROTIM and Ceramica Crintul (Timisoara) and ROMBETON (Bucharest).
- \* Observed management and counselor training sessions for purposes of program orientation. (Timisoara, Craiova)
- \* Began development of workshop, "Development of Human Resources and Personnel Management."
- \* Resumed coordination of Case Studies project and began project management plan.

Planned

- \* Complete development of workshop, "Development of Human Resources and Personnel Management," present, and revise per attendee feedback.
- \* Assist counselors and company clients with preparation of presentation materials for critique by J. McCullough, Ph.D., WSU.
- \* Assist counselors and company clients with finalizing presentation materials and format.
- \* Continue counselor mentoring and client counseling.
- \* Establish local (Bucharest) and U.S.A. committees to critique case studies, finalize project plan, and continue project activities.
- \* Establish special project plans to ensure continuity between current and next MBA interns, especially, CBE information center related activities and client programs.

INSTITUTION BUILDING

See above.

SUSTAINABILITY

See above

SERVICES PROVIDED:	Training	Counseling
Counselors/Faculty		20.5
Students		
Government Officials		
Business Community		
Other Groups		45.5
Project Preparation	22.0	
Case Study Project:	8.0	

Take out

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY FEBRUARY 1994  
BY: WM. J. FRONK

**HIGHLIGHTS:**

**Completed**

- \* Meeting with Romanian Free Trade Zone (Government Agency), general focus on FTZ's creation, evaluation, and sustainability.
- \* Meeting with IPROTEM's Chief Accountant (Sorin Stan), focus on current status of accounting in Romania.
- \* Meeting and training with ROMBETON, regarding preparation of presentation. Also, training in computer generation of presentation materials.
- \* Research for the development of training materials.
- \* Meeting with Ministry of Labor and Social Welfare.
- \* Meeting & Training with IPROTEM's (Timisoara) management team, re: current problems and facilitation of presentation preparation.
- \* Conducted and observed management training in Timisoara and Bucharest.
- \* Meeting and training with "Cera-Plast's" ceramic division. Determined this company is now two (2) separate legal entities.
- \* Research requests and replies, re: State-side & host-country correspondence and information development.
- \* Assisted in development of training material for Romanian Counselor's presentation/training.
- \* Orientation and fact finding mission in Craiova. Further, observed Counselor and management training.
- \* Mission plan refinement with Romanian & American colleagues

**Planned**

- \* Company visits in Bucharest & Timisoara in early March to assist in finalization of their presentation.
- \* Development and establishment of commitment criteria for company's (clients), creation of enhanced communication and coordination materials/documents.

**INSTITUTION BUILDING:**

- \* Further discussion on receipt of computers, equipment, and supplies from US for CFE in Bucharest, issues: security, insurance, and maintenance.
- \* Presentation in Bucharest & Timisoara on competition and self analysis.
- \* Creation of training materials.

**SUSTAINABILITY:**

- \* Enhanced contact made with Romanian & American colleagues in Bucharest, Timisoara, & Craiova. Discussions on refinement of mission plan & future action plans.
- \* Preparation & creation of training materials to be used for future projects and training sessions.

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty	12.5 hours	8 hours
Students	0 hours	0 hours
Government Officials	0 hours	5 hours
Business Community	54 hours	45 hours
Other Groups	0 hours	0 hours
Project Prep Time	17.0 hours	5 hours

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY FEB 1994  
BY: EUSTACE FERNANDEZ

**HIGHLIGHTS:**

- Completed
- \* Made a total of seven company visits. Attempted to identify specific areas of assistance for each company.
  - \* Developed a sample on company presentation and faxed each company a copy.
  - \* Clarified for company managers problem areas in the presentation outline.
  - \* Installed Microsoft PowerPoint and began developing presentation outlines for companies, including various graphs and charts.
  - \* With respect to the survey I am conducting, I have got them translated and have distributed them to various companies in both Bucharest and Timisoara. I have also enlisted the assistance of Romanian Counselors in these two centers to help distribute the surveys to their clients.
  - \* Assisted in the training session in both Timisoara and Bucharest by presenting on Customer Service, Employee Training, and Company Wide Strategies. I also provided feedback to company managers on their presentation during these training sessions.
  - \* Assisted Radu Stanciu with a research paper on employee evaluation by identifying specific areas of concentration and requesting materials from a Management Professor from Washington State University.
  - \* Developed material for companies who requested information on developing a Marketing Plan.

**Planned**

- \* Plan to continue visits to the companies in Bucharest and Timisoara and work with them on specific areas, where we can be of assistance.
- \* Plan to continue to participate actively in the training for managers.
- \* Plan to begin collection of completed surveys from the various companies.
- \* Plan to write an article for the MBA Association newsletter describing my experience in Romania.
- \* Plan to establish some ties with student organizations.

**INSTITUTION BUILDING:**

- \* Explained the purpose of the survey to various counselors in Timisoara and Bucharest. Explained how they could also use the information gathered to better understand their clients.

**SERVICES PROVIDED:**

Counselors/Faculty	Training	Counseling
Students	18	14 hours
Government Officials		
Business Community	58	48 hours
Other Groups		

TO: Bob Lolar, SBDC International Programs, WSU Vancouver  
FR: Jim Marten, PCV, Timisoara SBDC

## ACTIVITY REPORT FOR FEBRUARY 1994

<u>HOURS:</u>	<u>Manmt Training</u>	<u>Consultation</u>
Faculty/Trainers	32	27
Students	17	0
Govt. Officials	0	0
Business Managers	165	34
Others	0	0

### ACTIVITY HIGHLIGHTS

#### Completed

- \* Organized a seminar series for managers of existing businesses.
- \* Developed and delivered a training program in marketing for existing businesses at which a new seminar attendance record was set.
- \* Delivered a training program on organizational and communication strategies as part of the Managing for Change training program.
- \* Graduated our first Certified Professional Business counselor
- \* Met with student representatives of AISEC to discuss future collaboration projects
- \* Organized two Peace Corps funded seminars to be held in march and in April 1994.
- \* Recruited seven applicants for the USAID funded Partnership International program

#### Planned

- \* Have at least two more counselors ready for certification by the end of April 1994
- \* Develop information referral system to assist Center clients in locating needed information and forms of assistance.

### INSTITUTION BUILDING

- \* Introduced counterpart personnel to Peace Corps staff and other NGOs working in the field at a Peace Corps sponsored training seminar.

### SUSTAINABILITY

- \* Continued working with Center Director and new Administrative Coordinator to improve internal operations.
- \* Began development of strategic plan to address issues of long term financial support and collaboration with other NGOs.



TO: Robert Tolar  
 SBDC International Programs, WSU Vancouver

FROM: Sarah O'Neill  
 SMEC, ASE, București

**ASE CENTER ACTIVITY REPORT  
 FOR FEBRUARY 1994**

	Training hours	Consultation hours
Faculty/Counselors	22	19
Students	-	-
Government Officials	22	-
Business Community	48	21
Other		-
Seminars (int. "Subject Expert - Other")	118	-
Center Client Mtgs. (int. "Business Community")		(48)

**HIGHLIGHTS:**

**Completed:**

- \* Developed and delivered seminar on financing for development.
- \* Taught session on financial topics for Timișoara counselors.
- \* Delivered seminar on managerial finance for Timișoara.
- \* Determined dates for banking-finance seminars and scheduled press conference.
- \* Continued co-counseling with center counsellors and clients particularly related to CRIMM packages.

**Planned:**

- \* Continue coordinating between the eight organizations involved in the banking seminars.
- \* Attend one week Peace Corps Small Business Development technical training on project related progress, international marketing (import/export issues), macro-economic information and commercial issues specific to Romania.
- \* Press Conference kick-off event in Bucuresti and 3 2-day seminars (Curtea de Arges, Galati and Timisoara).
- \* Continue being an information resource for both the Romanian and American (WSU) staff in-country.

**INSTITUTION BUILDING:**

- \* Discussed with center director future center relocation plans and possible actions that may need to be considered (advertising, moving expenses, when moving back?, etc.).
- \* Prepared overview of SME sector that was provided to center staff and shared with WSU team members.
- \* Guided RDA toward taking a more active leadership role in the coordination of the 2-day banking seminars.

**SUSTAINABILITY:**

- \* Trained counselors in Timisoara on finance/cash flow topics towards achieving WSU counselor certification requirements.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: MARCH 1994  
BY: Katie Reikofski**

**HIGHLIGHTS:****Completed**

- \* Coordinated orientation, activities, housing, and travel for two WSU visiting professors.
- \* Completed quarterly review of ASE, Timisoara, and Craiova Center activities.
- \* Discussed additional program opportunities with:
  - Romanian Development Agency
  - Romanian Chamber of Commerce and Industry
  - Peace Corps
  - USAID NGO GAO researchers
- \* Organized "Privatization Training Day" for American Team and Romanian PBCs - Barbu, Sorin David, - Coopers & Lybrand participated.
- \* Assisted in design of the Peace Corp Seminar for Bankers and Entrepreneurs to be held in five sites in Romania.
- \* Presented CBE Center activities to the meeting of the Chamber of Commerce and Industry and the International Bureau of Chambers of Commerce and "How To Help SMEs In Their Marketing - Put The Client Into Market Planning."

**Planned**

- \* Develop orderly transition process for WSU MBAs.
- \* Complete work on CM, install computer lab, plan opening.

**INSTITUTION BUILDING:**

- \* Assisted in preparations for the Vice-Rector's trip to the United States and in discussions on a student exchange program with the Rector and Management Department.
- \* Maintained close contact with construction advisors and Vice-Rector on completion of renovation of building CM.

**SUSTAINABILITY:**

- \* Developed systems to assure contract expenditures are made in a timely manner and contracts completed for all work.

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty	12 hours	5 hours
Students	hours	hours
Government Officials	9 hours	4 hours
Business Community	74 hours	hours
Other Groups (eg NGOs)	12 hours	8 hours
Project Prep Time	5 hours	hours

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY: MARCH 1994  
BY: David Reikofski**

**HIGHLIGHTS:**

**Completed**

- \* Coordinated training in Timisoara and Bucharest for Dr. James McCullough, visiting professor from WSU.
- \* Coordinated training in Timisoara, Craiova and Bucharest for Dr. Steven Maurer, visiting professor from WSU.
- \* Finalized Master Business Counselor training program.
- \* Coordinated American team and taught market research in the Management Training for Privatizing Companies, in Craiova.
- \* Participated at a Peace Corps planning session in Sinaia to increase interaction between Peace Corps, WSU and Centers.
- \* With President of the Chamber of Commerce and Industry in Timisoara, planned counselor training for CCIT counselors and customer service training for other employees.
- \* Working with Craiova Director, transferred leadership in Craiova project to Peter Quist, WSU BDS.

**Planned**

- \* Begin Master Business Counselor training.
- \* Begin the counselor and customer service training for the Chamber of Commerce and Industry in Timisoara.

**INSTITUTION BUILDING:**

- \* Completed an agreement with President of the Chamber of Commerce and Industry in Timisoara to train CCIT counselors using the PBC training program.

**SUSTAINABILITY:**

- \* Trained Timisoara Center secretary on computer.

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	26 hours	4 hours
Students	6 hours	hours
Government Officials	hours	hours
Business Community	29 hours	3 hours
Other Groups	hours	hours
Preparation	74 hours	1 hour

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIA PROJECT ACTIVITY MARCH 1994**

**BY: PETER QUIST**

**HIGHLIGHTS:****Completed:**

- \* Developed, wrote, negotiated, and implemented structural organization plan for the Management Training Program in Craiova including roles, responsibilities, and duties of Romanian counselors, University Business Center, and WSU staff
- \* Prepared and presented seminars for counselors, companies, and students covering:
  - Information gathering
  - Negotiation
  - Marketing: Target markets; Pricing; Benefit Selling; Distribution; Customer Service
- \* Directed MBA student activity in company counseling and training seminar content and performance
- \* Escorted Dr. Steven Maurer through deepest, darkest Romania by train from Timisoara to Craiova to Bucharest. Also, protected same from kamikaze drivers and tuica.
- \* Reviewed and evaluated company presentations performed before Dr. James McCollough
- \* Co-counseled at company sites with special emphasis on new product development, company marketing, and privatization strategies.

**Planned**

- \* Continue co-ordination of translating financial statements from Romanian language and form in English equivalents
- \* Complete English translation of company presentations and develop marketing documents from same
- \* Finalize working weekend trip to Tirgu Jui with Craiova staff to set up relationship, seminar, and meetings
- \* Develop more company specific training and materials on Financial Management and Selling

**INSTITUTION BUILDING:**

- \* Arranged and attended meetings with personnel from:
  - Chamber of Commerce Trade Registry
  - Coopers and Lybrand
- \* Attended USAID monthly meeting
- \* Interviewed by Timisoara radio station
- \* Filmed by Timisoara television directing business training seminar

**SUSTAINABILITY:**

- \* Worked closer with Romanian counselors on company specific needs and requests; and directed counselor efforts in same

**SERVICES PROVIDED:**

	<b>Training</b>	<b>Counseling</b>
Counselors/Faculty	42 hours	37 hours
Students	27 hours	hours
Government Officials	hours	hours
Business Community	196 hours	30 hours
Other Groups	hours	hours
Project Preparation	20 hours	23 hours

SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER, WA  
 ROMANIAN PROJECT ACTIVITY MARCH 1994  
 BY: ALMA GOLAZESKI *AG*

## HIGHLIGHTS:

Completed

- \* Completed development of workshop, "Development of Human Resources and Personnel Management."

Planned

- \* Continue counseling business clients along with assigned Romanian counselors.
- \* Begin revision of client investor presentation materials based on critique of J. McCullough, Ph.D., visiting WSU consultant.

## INSTITUTION BUILDING

- \* Coordination of Case Study Project.

## SUSTAINABILITY

- \* Presented "Development of Human Resources and Personnel Management" workshop to entrepreneurs, business management, and counselors.
- \* Co-counsel Romanian Master Business Counselor candidates.
- \* Mentor administrative personnel on use of microcomputer software.

SERVICES PROVIDED:	Training	Counseling
Counselors/Faculty	12.0	16.5
Students		
Government Officials		
Business Community	67.5	126.0
Other Groups	6.0	
Project Preparation	18.0	
Case Study Project:	12.5	

*12/1 Oct*

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY MARCH 1994**

BY: WM. J. FRONK

**HIGHLIGHTS:****Completed**

- \* Finalized company (Robeton, Titan Nuclear Equip., IPROTEM, & Cera-Plast) presentations (1st draft), for critique by Dr. James McCullough.
- \* Developed commitment criteria for project companies.
- \* Established increased use of documents to enhance communication and coordination.
- \* Attended: privatization seminar; management training; and various planning and coordination meetings with American and Romanian colleagues.
- \* Counseled small business, re: start-up and strategic issues.
- \* Visited & counselled Titan Nuclear Equip., IPROTEM, & Cera-Plast (subjects: HR, Cost Acctg., Networking, & General Mgt.)
- \* Wrote case study.
- \* Met with Romanian Free Zones Agency (FZA) to facilitate advancement of free trade zones (FTZ's) within Romania.
- \* Various training and counseling with Romanian colleagues (e.g. general business Q & A to computer training).
- \* Conducted management training in Craiova.
- \* Prepared cost accounting material, for management training.

**Planned**

- \* Conduct Cost Accounting Training sessions in Bucharest, Craiova, and Timisoara.
- \* Further assistance to FZA.
- \* Continued assistance and support to project companies.

**INSTITUTION BUILDING:**

- \* Facilitated advancement of FZA (Ministry of Transportation) & FTZ's within Romania.
- \* Creation of training materials (case study and Cost Accounting packet).
- \* Training of Romanian counselors/colleagues (PUB): various business topics; technical computer use; and use of correspondence for communication & coordination.

**SUSTAINABILITY:**

- \* Continued contact with Romanian & American colleagues in Bucharest, Timisoara, & Craiova. Discussions on program direction & future action plans.
- \* Preparation & creation of training materials to be used for future projects and training sessions.

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty	28 hours	9 hours
Students	18 hours	0 hours
Government Officials	0 hours	10.5 hours
Business Community	24 hours	46.5 hours
Other Groups	0 hours	0 hours
Project Prep Time	30 hours	10 hours

**SBDO INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIAN PROJECT ACTIVITY MARCH 1994**  
**BY: EUSTACE FERNANDEZ**

**HIGHLIGHTS:**

**Completed**

- \* Made a total of ten company visits.
- \* Developed company presentation materials on Microsoft Power Point.
- \* Clarified for company managers problem areas in their presentation outline.
- \* Helped translate presentations into English.
- \* With respect to the survey I am conducting, I have completed distributing them to various companies in Bucharest, Timisoara, and Craiova. I have also enlisted the assistance of Romanian Counselors in these three centers to help distribute the surveys to their clients.
- \* Assisted Radu Stanciu with a research paper on employee evaluation by discussing specific areas of interest and by obtaining more materials from Washington State University.
- \* Organized the translation of Income Statements and Balance Sheets into English.
- \* Accompanied Dr. McCullough on three company visits.
- \* Obtained list of foreign companies operating in Romania from individual embassies and from RDA. Began distributing the list to companies which are attempting to organize their marketing effort.
- \* Gave a hands on lesson on Microsoft Excell to company managers.
- \* Gave a hands on lesson on Microsoft Power Point to some of the staff and counselors at the center.

**Planned**

- \* Plan to continue visits to the companies in Bucharest and Timisoara and work with them on specific areas, where we can be of assistance.
- \* Plan to complete collection of completed surveys from the various companies.
- \* Plan to write an article for the MBA Association newsletter describing my experience in Romania.

**INSTITUTION BUILDING:**

- \* Explained the purpose of the survey to various counselors in Timisoara and Bucharest. Explained how they could also use the information gathered to better understand their clients.

**SERVICES PROVIDED:**

	Training	Counseling
Counselors/Faculty		
Students		21.5 hours
Government Officials		
Counselors/Faculty		
Students		21.5 hours
Government Officials		
Business Community		
Other Groups		78 hours

**TO: Bob Tolar, SBDC International Programs**

**FR: Jim Marten, PCV, Timisoara SBDC**

### ACTIVITY REPORT FOR MARCH, 1994

<u>HOURS</u>	<u>Mgmt Training</u>	<u>Consultation</u>
Faculty/Trainers	28	23
Students	0	5
Govt. Officials	4	3
Business Managers	49	31
Others	0	7

### ACTIVITY HIGHLIGHTS

#### Completed

- \* Organized a two day seminar for banking and loan application issues for managers of local firms as well as loan officers from area banks
- \* Consulted with Center Director on most effective way to organize and implement information referral system
- \* Began planning for future seminar series on international marketing and exporting to the United States
- \* Set strategy with two counselors on completion of Professional business Counselor certification

#### Planned

- \* Present a two day international marketing seminar in late April for local managers and other business development specialists
- \* organize internal information resources for increased access and usability

### INSTITUTION BUILDING

- \* Held meeting with Peace Corps Project manager and Center Director to discuss ways to increase cooperation on mutual projects

### SUSTAINABILITY

- \* Completed training of new office secretary and reorganized work roles to provide further delegation and sustainability of office operating systems



31-MAR-1994 15:05

FROM Peace Corps Romania

TO

2113925 P.01

TO: Robert Tolar  
 SBDC International Programs, WSU Vancouver

FROM: Sarah O'Neill  
 SMEC, ASE, București

**ASE CENTER ACTIVITY REPORT  
 FOR MARCH 1994**

	Training hours	Consultation hours
Faculty/Counselors	-	
Students		
Government Officials	38	2
Business Community	12	1
Other	16	1
Seminars (Put in "Other" Contact-Alma)	30	2
	(476)	1
Center Client Mtgs. 50 (Put in "Business Community")		1

**HIGHLIGHTS:**

**Completed:**

- \* Attended one week technical training for Peace Corps SBD project volunteers and collaborating institutions.
- \* Coordinated and completed the press conference and the first three of the 6 2-day seminars on banking-finance topics for entrepreneurs and bankers.
- \* Participated in a panel discussion on small business in Romania addressing ASE students.

**Planned:**

- \* Coordinated the 3 remaining banking-finance seminars and co-present the ASE Center activities for the Bucuresti event.
- \* Assist Alma with the case study project on a as needed basis.
- \* Continue Special Olympics assistance to local programs.
- \* Attend a 3 day all volunteer conference organized by Peace Corps Eastern Europe in the Slovak Republic.

**INSTITUTION BUILDING:**

- \* Discussed with the center director the center business plan and areas that need attention.
- \* Discussed the use of CRIMM packages as a basis for creating industry specific studies.
- \* Discussed using case studies already presented (one successful, one unsuccessful) as part of the counselor certification process as a basis for creating a center library of Romania specific case studies.

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Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data- Page 2)

PROJECT EXPENDITURES	AID FUNDS		GRANTEE		OTHER SOURCES		OTHER SOURCES		ACCUMULATED CUMULATIVE	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected			
Workshops, Seminars, Conf.											
Video/T.V. Production											
Subcontractors <u>UPB *</u>	24,783	25,000							97,250	37,415	31,000
Subcontractors											
Subcontractors											
Translation											
Scholarships											
Curriculum Development											
Other Direct Costs											
Other <u>Renovation</u>	20,000	87,417							20,000	67,417	67,417
<b>TOTAL PAGE 1 &amp; 2</b>									623,627	376,367	262,468

\* 262,469 less amounts expended for UPB by WSU for renovating equipment and office furniture and supplies.

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# FINANCIAL STATUS REPORT

(Short Form)

(Follow instructions on the back)

<b>1. Federal Agency and Organizational Element to Which Report is Submitted</b> Agency for International Development	<b>2. Federal Grant or Other Identifying Number Assigned By Federal Agency</b> EUR-0029-G-00-3050-00	<b>OMB Approval No.</b> 0348-0039	<b>Page</b> 1 <b>of</b> 1 <b>pages</b>
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**3. Recipient Organization (Name and complete address, including ZIP code)**  
 Washington State University  
 240 French Administration Building, ATTN: Joan Root #177460  
 Pullman, WA 99164-1025

<b>4. Employer Identification Number</b> 91-6001108	<b>5. Recipient Account Number or Identifying Number</b> 12R-3910-0202	<b>6. Final Report</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>7. Basis</b> <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual
--	---	---	--

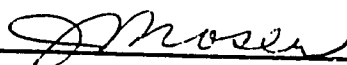
<b>8. Funding/Grant Period (See Instructions)</b> From: (Month, Day, Year) July 1, 1993	<b>To: (Month, Day, Year)</b> September 30, 1994	<b>9. Period Covered by this Report</b> From: (Month, Day, Year) January 1, 1994	<b>To: (Month, Day, Year)</b> March 31, 1994
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10. Transactions:	I Previously Reported	II This Period	III Cumulative
a. Total outlays	397,024.76	226,602.46	623,627.22
b. Recipient share of outlays	0.00	0.00	0.00
c. Federal share of outlays	397,024.76	226,602.46	623,627.22
d. Total unliquidated obligations			0.00
e. Recipient share of unliquidated obligations			0.00
f. Federal share of unliquidated obligations			0.00
g. Total Federal share (Sum of lines c and f)			623,627.22
h. Total Federal funds authorized for this funding period			1,000,000.00
i. Unobligated balance of Federal funds (Line h minus line g)			376,372.78

<b>1. Indirect Expense</b>	<b>a. Type of Rate (Place "X" in appropriate box)</b>			
	<input type="checkbox"/> Provisional	<input checked="" type="checkbox"/> Predetermined	<input type="checkbox"/> Final	<input type="checkbox"/> Fixed
	<b>b. Rate</b> 45% 26%	<b>c. Base</b> 2,516.78 136,309.93	<b>d. Total Amount</b> 1,132.56 35,440.57	<b>e. Federal Share</b> 36,573.13

**2. Remarks:** Attach any explanations deemed necessary or information required by Federal sponsoring agency in compliance with governing legislation.  
 0% 51,202.62

**1. Certification:** I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.

<b>Typed or Printed Name and Title</b> Jeanne Moser Accounting Supervisor II	<b>Telephone (Area code, number and extension)</b> (509) 335-2058
<b>Signature of Authorized Certifying Official</b> 	<b>Date Report Submitted</b> 5/2/94

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**PUBLIC VOUCHER FOR PURCHASES AND SERVICES OTHER THAN PERSONAL**

VOUCHER NO.  
#2

U.S. DEPARTMENT, BUREAU, OR ESTABLISHMENT AND LOCATION  
Agency for International Development

DATE VOUCHER PREPARED  
April 29, 1994

SCHEDULE NO.

CONTRACT NUMBER AND DATE  
EUR-0029-G-00-3050-00

REQUISITION NUMBER AND DATE

PAID BY

**PAYEE'S NAME AND ADDRESS**

Washington State University  
240 French Administration Building  
ATTN: Joan Root #177460  
Pullman WA 99164-1025

DATE INVOICE RECEIVED

DISCOUNT TERMS

PAYEE'S ACCOUNT NUMBER

SHIPPED FROM

TO

WEIGHT

GOVERNMENT B/L NUMBER

NUMBER AND DATE OF ORDER	DATE OF DELIVERY OR SERVICE	ARTICLES OR SERVICES <i>(Enter description, item number of contract or Federal supply schedule, and other information deemed necessary)</i>	QUAN- TITY	UNIT PRICE		AMOUNT ( <sup>1</sup> )
				COST	PER	
	1994	Expenditures Report per attached 1035				226,602.46

(Use continuation sheet(s) if necessary)

(Payee must NOT use the space below)

TOTAL

226,602.46

PAYMENT:

- COMPLETE
- PARTIAL
- FINAL
- PROGRESS
- ADVANCE

APPROVED FOR

= \$

EXCHANGE RATE

= \$1.00

DIFFERENCES

TITLE

Amount verified; correct for

(Signature or initials)

Pursuant to authority vested in me, I certify that this voucher is correct and proper for payment.

(Date)

(Authorized Certifying Officer)<sup>2</sup>

(Title)

ACCOUNTING CLASSIFICATION

PAID BY

CHECK NUMBER

ON TREASURER OF THE UNITED STATES

CHECK NUMBER

ON (Name of bank)

CASH

DATE

PAYEE<sup>3</sup>

\$

PER

TITLE

<sup>1</sup> When stated in foreign currency, insert name of currency.  
<sup>2</sup> If the ability to certify and authority to approve are combined in one person, one signature only is necessary; otherwise the approving officer will sign in the space provided, over his official title.  
<sup>3</sup> When a voucher is received in the name of a company or corporation, the name of the person writing the company or corporate name, as well as the capacity in which he signs, must appear. For example: "John Doe Company, per John Smith, Secretary", or "Treasurer", as the case may be.

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PUBLIC VOUCHER FOR PURCHASES AND SERVICES OTHER THAN PERSONAL

VOUCHER NO. 2

SHEET NO.

1

BUDGET CATEGORY	BUDGET AMOUNT	CURRENT PERIOD MAR 31, 1994	CUMULATIVE FROM 07/01/93 TO 03/31/94
SALARIES	\$254,432.00		
ON-CAMPUS		\$1,917.00	
OFF-CAMPUS		\$64,531.46	
		\$66,471.46	\$174,483.85
FRINGE BENEFITS	\$66,165.00		
ON-CAMPUS		\$569.73	
OFF-CAMPUS		\$15,646.35	
		\$16,216.13	\$38,506.66
TRAVEL/PER DIEM	\$175,288.00		
ON-CAMPUS		\$0.00	
OFF-CAMPUS		\$34,954.45	
		\$34,954.45	\$114,114.70
NONEXPENDABLE EQUIPMENT	\$8,700.00		
OFF-CAMPUS		(\$4,347.60)	
SUBCONTRACTS	\$262,467.00		\$7,875.24
OFF-CAMPUS		\$25,000.00	
OFF-CAMPUS NO INDIRECT		\$52,550.22	
		\$77,550.22	\$77,550.22
STIPENDS	\$9,600.00		
OFF-CAMPUS		\$0.00	
			\$4,800.00
OTHER DIRECT COSTS	\$39,554.00		
ON-CAMPUS		\$0.00	
OFF-CAMPUS		(\$3,622.33)	
ON INDIRECT		\$3,000.00	
		(\$622.33)	\$91,394.86
INDIRECT COSTS	\$153,744.00		
ON-CAMPUS @45% X \$ 2516.78		\$1,132.56	
OFF-CAMPUS @26% X 111309.93		\$23,940.57	
SUBCONTRACT @26% x 25,000.00		\$6,500.00	
		\$36,573.13	\$114,901.69
TOTAL	\$1,000,000.00	\$226,602.46	\$623,627.22

# ALMA D. GOLAZESKI

P.O. Box 925  
Seahurst, Washington 98062  
U.S.A.  
(206) 244-3389

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**SUMMARY** Seasoned business analyst/information management professional with extensive experience in program management, management consulting, and strategic planning seeking position in management development/management consulting in international arena.

Background includes business modeling and critical success factor analysis, organizational change, information systems, data communications, and training. Resourceful, innovative, and sensitive to complexity of international business operations and diverse cultures.

## **EXPERIENCE**

### **PROGRAM MANAGEMENT**

Managed the design, development, and implementation of a metropolitan mass transit operations system effecting cost savings and improved contract compliance. Coordinated and implemented change management among diverse organizations--operations management/union membership, training, scheduling, finance/payroll management, and computer services.

Managed and coordinated the multi-million dollar implementation of customer information management process and its integration with financial services and marketing operations among corporate and thirty-two branch offices, enabling competitive advantage of major northwest bank. Ensured vendor contract compliance.

Managed and coordinated the design, development, and implementation of database to model alternative manufacturing and inventory control architectures to improve competitive project proposal and strategic planning processes.

### **MANAGEMENT CONSULTING**

Guided the opportunity evaluation of electronic data interchange to support hazardous materials management, focusing on operational and technology issues and related vendor-partnership issues.

Developed and implemented a marketing data collection and transmission capability resulting in timely coordination of marketing research data distribution among independent research firms and individual operating companies.

Provided technical marketing support to sales organization regarding vendor proposals for teleprocessing systems for private and public sectors, including manufacturing, banking, finance, warehouse distribution, retail industries, and federal, state, and provincial government agencies in United States and Canada.

### **STRATEGIC PLANNING**

Designed strategic planning life cycle and administrative procedures for university to identify, assess, and monitor international joint venture and academic objectives and opportunities, utilizing business modeling and critical success factor analysis.

Defined charter, policies, and administrative infrastructure for corporate information management function, addressing business models and data stewardship, information systems planning, and technology architectures.

Designed a generic project management methodology to administer development projects, including work product definition and risk assessment and conflict management procedures.

**SPECIAL APPOINTMENT**

U.S. Fulbright Scholar (American University in Bulgaria, 1992)

Researched cultural and economic issues that affect development of business and management skills in Eastern Europe. Besides Bulgaria, visited Hungary, Poland, Slovenia, and Czechoslovakia.

Conducted lectures in Business Administration and in writing proposals for international projects, focusing on planning and implementation.

**EDUCATION**

JD (Business Planning) (American Jurisprudence Award, Legal Writing, 1988)	University of Puget Sound	1991
MBA (Management)	University of Puget Sound	1983
BA (Mathematics)	Rutgers University	1968

**EMPLOYMENT HISTORY**

<i>The Boeing Company</i> , Seattle, Washington	1978-81, 1985-1993
<i>Municipality of Metropolitan Seattle</i> , Seattle, Washington	1983-1985
<i>Washington Mutual Savings Bank</i> , Seattle, Washington	(10-month position) 1981
<i>Informatics, Inc.</i> , New York, New York/Marina del Rey, California	1974-1978
<i>American Telephone &amp; Telegraph</i> , Piscataway, New Jersey	1968-1974

**ADDITIONAL INFORMATION**

Rudimentary language skills in French, Spanish, and Bulgarian.

Community Service: Volunteer literacy and life skills tutor at Renton Technical College; Volunteer at Intiman Theatre; Member, World Affairs Council/volunteer host to foreign participants in exchange programs.



**Management Training and Economics Education for Romania  
Washington State University**

**Name:** Peter Quist

**Position:** Business Development Specialist

**Reports to:** WSU Project Chief of Party [J. Kathleen ("Katie") Reikofski]

**Liaison to:** Selected State Owned Enterprises Seeking Privatization Readiness Assistance

**Primary Duty:** To transfer to the Romanian higher education and economic development systems those aspects of the Washington State University Small Business Development Center model most applicable to the Romanian environment, with modifications necessary to ensure that management assistance will be available to small and medium enterprises during, but more importantly, after the termination of the USAID funded project.

To help prepare the business faculty members of the Department of Industrial Management of the Universitatea "Politehnica" din București to carry out present and future training in the areas of small and medium business management and those areas applicable to the privatization process of state-owned companies.

**General Responsibilities:** In your position as Business Development Specialist, you will:

1. Provide counselor training (i.e., mentoring and coaching) to Romanian business faculty identified as small and medium enterprise counselors;
2. Enhance the education of faculty and counselors in areas such as business planning, market analysis and planning, recordkeeping, personnel, and general business management through
  - a. one-to-one mentoring
  - b. small group discussions
  - c. seminar and workshops
  - d. large group lectures, when appropriate.
3. Serve as a resource to Romanian private enterprise THROUGH Romanian counselors, NOT THROUGH direct counseling of business owners and managers.
4. Provide Romanian business owners and managers with information on basic business management through seminars and workshops designed specifically for them.
5. Take actions to promote Pacific Northwest businesses and products whenever appropriate.

6. Help establish a United States and State of Washington business information desk at the Universitatea "Politehnica" din București Center for Business Excellence which will serve as a resource to Romanian businesses wishing to purchase specific products, commodities, and services; and which will increase visibility for Washington businesses in Romania and enhance future trade possibilities for both countries.
7. Provide **DIRECT** assistance to identified personnel with state-owned firms participating in the Privatization Training and Technical Assistance for State-Owned Companies component of the project. (At all other times you will work through a Romanian counselor, thus working only indirectly with the Romanian business.)

### **Specific Responsibilities:**

1. In consultation and cooperation with the Washington State University staff in Romania, you will present no fewer than two (2) seminars per month for small business owners/managers, management faculty, and government employees at sites to be determined by the Chief of Party.
2. You will see to the distribution, completion, and collection of "Participant Inquiry Forms" (attached) to **ALL** participants at seminars, consultations, and other activities. These inquiry forms will be collated and sent directly to Dr. Leslie Koltai once per month.
3. You will prepare appropriate curriculum materials for use in all presentations, and you will supply the WSU SBDC Office of International Programs [Bob Tolar's Office] with copies of all curriculum materials.
4. You will, under the direction of the WSU Chief of Party, play a lead role in the Privatization Training and Technical Assistance for State-Owned Companies component of the project. Your specific duties and the companies with which they will be performed, must be determined by you and the WSU Chief of Party after your arrival in Romania. Such duties will include, but not be limited to, providing technical assistance in the areas of business planning, market research, project management, personnel policy development, export readiness, and record keeping.
5. You will assist in the general supervision and education experience of MBA students from the State of Washington who will be in Romania during your assignment there.
6. You will submit regular reports every two weeks directly to the WSU Project Director [Bob Tolar]. These reports shall describe your activities of the previous two weeks and outline plans for the next two weeks.

7. You will cooperate with the Romanian Office of the United States Agency for International Development [USAID] whenever possible in helping them carry out their objectives within the country.
8. You will follow all WSU policies relating to international sponsored projects, including cash advance accounting, travel, etc.
9. You will provide assistance to administrators and other leaders of the Universitatea "Politehnica" din București [or other institutions identified by the Chief of Party] as requested in areas of management training, technology transfer, marketing, curriculum revision, and other areas which can be identified as being within the purview of the project.
10. You will carry out other duties related to the project as may be identified from time to time by the Chief of Party and the Project Director.

**Management Training and Economics Education for Romania  
Washington State University**

**Name:** Alma D. Golazeski

**Position:** Business Development and Technology Transfer Specialist

**Reports to:** WSU Project Chief of Party [J. Kathleen ("Katie") Reikofski]

**Liaison to:** Selected State Owned Enterprises Seeking Privatization Readiness Assistance

**Primary Duty:** To transfer to the Romanian higher education and economic development systems those aspects of the Washington State University Small Business Development Center model most applicable to the Romanian environment, with modifications necessary to ensure that management assistance will be available to small and medium enterprises during, but more importantly, after the termination of the USAID funded project.

To help prepare the business faculty members of the Department of Industrial Management of the Universitatea "Politehnica" din București to carry out present and future training in the areas of small and medium business management and those areas applicable to the privatization process of state-owned companies.

**General Responsibilities:** In your position as Business Development and Technology Transfer Specialist, you will:

1. Provide counselor training (i.e., mentoring and coaching) to Romanian business faculty identified as small and medium enterprise counselors;
2. Enhance the education of faculty and counselors in areas such as business planning, market analysis and planning, recordkeeping, personnel, and general business management through
  - a. one-to-one mentoring
  - b. small group discussions
  - c. seminar and workshops
  - d. large group lectures, when appropriate.
3. Serve as a resource to Romanian private enterprise THROUGH Romanian counselors, NOT THROUGH direct counseling of business owners and managers.
4. Provide Romanian business owners and managers with information on basic business management through seminars and workshops designed specifically for them.
5. Take actions to promote Pacific Northwest businesses and products whenever appropriate.

6. Help establish a United States and State of Washington business information desk at the Universitatea "Politehnica" din București Center for Business Excellence which will serve as a resource to Romanian businesses wishing to purchase specific products, commodities, and services; and which will increase visibility for Washington businesses in Romania and enhance future trade possibilities for both countries.
7. Provide **DIRECT** assistance to identified personnel with state-owned firms participating in the Privatization Training and Technical Assistance for State-Owned Companies component of the project. (At all other times you will work through a Romanian counselor, thus working only indirectly with the Romanian business.)

### **Specific Responsibilities:**

1. In consultation and cooperation with the Washington State University staff in Romania, you will present no fewer than two (2) seminars per month for small business owners/managers, management faculty, and government employees at sites to be determined by the Chief of Party.
2. You will see to the distribution, completion, and collection of "Participant Inquiry Forms" (attached) to **ALL** participants at seminars, consultations, and other activities. These inquiry forms will be collated and sent directly to Dr. Leslie Koltai once per month.
3. You will prepare appropriate curriculum materials for use in all presentations, and you will supply the WSU SBDC Office of International Programs [Bob Tolar's Office] with copies of all curriculum materials.
4. You will, under the direction of the WSU Chief of Party, play a lead role in the Privatization Training and Technical Assistance for State-Owned Companies component of the project. Your specific duties and the companies with which they will be performed, must be determined by you and the WSU Chief of Party after your arrival in Romania. Such duties will include, but not be limited to, providing technical assistance in the areas of business planning, market research, project management, personnel policy development, export readiness, and record keeping.
5. You will assist in the general supervision and education experience of MBA students from the State of Washington who will be in Romania during your assignment there.
6. You will submit regular reports every two weeks directly to the WSU Project Director [Bob Tolar]. These reports shall describe your activities of the previous two weeks and outline plans for the next two weeks.

7. You will cooperate with the Romanian Office of the United States Agency for International Development [USAID] whenever possible in helping them carry out their objectives within the country.
8. You will follow all WSU policies relating to international sponsored projects, including cash advance accounting, travel, etc.
9. You will provide assistance to administrators and other leaders of the Universitatea "Politehnica" din București [or other institutions identified by the Chief of Party] as requested in areas of management training, technology transfer, marketing, curriculum revision, and other areas which can be identified as being within the purview of the project.
10. You will carry out other duties related to the project as may be identified from time to time by the Chief of Party and the Project Director.

CENTERS FOR BUSINESS EXCELLENCE

INTERNATIONAL MARKETING TRAINING IN ROMANIA

FINAL REPORT

prepared by

James McCullough  
Department of Marketing  
Washington State University

March 21, 1994

## INTRODUCTION

This training activity was undertaken as part of the Centers for Business Excellence program supported by USAID in Romania and conducted through Washington State University. This activity provided small and middle sized businesses and business counsellors with an understanding of the risks and benefits of marketing in the international environment. The training was conducted in Timisoara and in Bucharest during the period 5-14 March 1994.

## TRAINING PROGRAMS

One day of training was conducted in Timisoara on Tuesday, 8 March for business counsellors and representatives of four state operated firms in the process of privatization. Documentation on which the training was based is attached as Appendix I. Three hours of formal training in marketing and international marketing was conducted. This training was participative and included lectures and discussion and workshop activities. Fourteen participants completed evaluations of the session and it was very favorably received. A summary of the evaluations is attached as Appendix II.

The formal training was followed by presentations by the four companies, and critiques were given for each of their presentations. Each firm made a presentation designed to attract foreign investments and they were critiqued on that basis. Specific comments on the presentations are presented later in this document. Training and presentations were followed by visits to two of the companies on Wednesday, 9 March. During these sessions, specific and detailed comments on business proposals were made, and suggestions were made on how to improve their marketing activities.

One day of training was conducted in Bucharest on Friday, 11 March for business consultants and representatives of seven firms. In this session, firms made presentations before the formal training to insure all firms would have ample time to participate. Training in international marketing was conducted at the end of the day. The session was similar to that in Timisoara and was again well received. A consultation visit to one of the firms was made on Monday, 14 March, to assist with the development of international markets and comment on the development of marketing activities for that firm.



## INSTITUTIONAL LINKAGE DEVELOPMENT

In addition to the formal training and presentation critiques, meetings were held on Monday, 7 March, with the Rector of the Polytechnic University and the Chair of the Department of Industrial Management concerning the development of possible exchange activities between the Polytechnic and Washington State University. An exchange agreement between Washington State University and Bucharest Polytechnic University was signed by the Rector and will be signed by WSU during the visit of the Vice-Rector to Pullman later this month.

A meeting was held with the President of Black Sea University concerning possible participation of WSU in those programs. It was agreed that WSU will explore approaches to encourage participation by WSU faculty in Black Sea University activities although it was not clear how funding for those activities might be obtained.

## OTHER ACTIVITIES

A schedule of activities conducted is shown in Appendix III.

## CONCLUSIONS AND RECOMMENDATIONS

### Effectiveness of Programs:

The project personnel have an enthusiasm and work level that is truly exceptional. It is because of this that so much has been accomplished with such limited resources. This enthusiasm should be recognized and rewarded as much as possible.

Firms have clearly made progress in the development of their business knowledge and understanding of western business practices. Their presentations were well presented in a professional manner. However, the format specified for these presentations is not particularly responsive to client needs and leads to rather dull presentations. Presentation structures should be altered to allow for more responsiveness and to reflect better the character of the firms. More specifically presentations must:

show a clear benefit or opportunity for the client receiving the presentation.

discuss the risks inherent in Romanian investments and specific to the firm, and should show how these risks can be reduced or managed.

demonstrate managerial and technical skills and experience of the personnel.

present the firm in the most positive and professional manner through presentation style.

clearly make an "ask" and tell the client what they are supposed to do next if their interest continues.

It is also suggested that firms should:

be prepared on time and reflect good understanding of client needs.

present in the language of the client through skilled translators who understand the firm or at least prepare visual materials in that language.

show examples of products when possible.

introduce staff present and discuss their qualifications when appropriate

# MARKETING AUDIT

## PART I. MARKETING ENVIRONMENT AUDIT

### MACROENVIRONMENT

#### A. Economic and demographic

1. What major developments in income, prices, savings, and credit will affect the company?
2. What major demographic developments (size, age pyramid, geographic distribution) will affect the company?

#### B. Technological

1. What major changes are occurring in product technology and manufacturing process technology?
2. What major generic substitutes might replace this product?

#### C. Political

1. What laws are being proposed that could affect marketing strategy and tactics?
2. What federal, state, and local actions should be watched? What is happening in the areas of pollution control, equal employment opportunity, product safety, advertising, price control, and so forth, that affects marketing strategy?

#### D. Cultural

1. What is the public's attitude toward business and toward the products produced by the company?
2. What changes in consumer and business lifestyles and values have a bearing on the company's target market and marketing means?

## THE MARKETING MIX

The marketing mix consists of four elements of strategy, working together to satisfy the needs of a segment for the population identified as a target market. The elements for the marketing mix include:

1. Products
2. Prices
3. Communications
4. Distribution Systems

**EXERCISE:** Identify a target market in Romania and propose a marketing mix designed to satisfy the needs of that segment.

The combination of target markets and marketing mixes for a company becomes the marketing program.

**EXERCISE:** Using one of the products exhibiting something other than Full demand, develop a marketing program to correct that situation.

**EXERCISE:** Use the attached questionnaires to perform an audit of your organization's marketing program.

## PART II. MARKETING STRATEGY AUDIT

### A. Objectives

1. Are the corporate objectives stated in the form of clear goals?
2. Are the corporate and marketing objectives clearly ranked to guide marketing planning and performance measurement? Do they logically result from general policy goals?
3. Are the marketing objectives appropriate, given the company's competitive position, resources, and opportunities?

### B. Strategy

1. What marketing strategy was selected to bring about the objectives? Is it appropriate?
2. Are enough resources budgeted to accomplish the marketing objectives?
3. Are marketing resources allocated optimally to the major elements of the marketing mix?

## PART III. MARKETING ORGANIZATION AUDIT

### A. Formal Structure

1. Is there a marketing officer to coordinate the activities that affect the customer's satisfaction?
2. Are the marketing responsibilities optimally structured along functional, product, end-user, and territorial lines?

### B. Functional Efficiency

1. Are there good communication and working relations between marketing and sales?
2. Is the product management system working effectively? Are product managers able to plan profits or only sales volume?
3. Are there any groups in marketing that need more training, motivation, supervision, or evaluation?

## TASK ENVIRONMENT

### A. Markets

1. What is happening to market size, growth , geographical distribution, and profits?
2. What are the major market segments and how do they evolve? Which are the strong/weak potential markets?

### B. Customers

1. How do customers and prospects rate the company and its competitors on reputation, product quality, service, sales force, and price?
2. How do different customer segments make their buying decisions?
3. What are the needs and expectations of the consumers within this market?

### C. Competitors

1. What are the main trade channels for bringing products to customers?
2. What trends are occurring among suppliers in their pattern of selling?

### D. Facilitators and Marketing Firms

1. What is the cost and availability outlook for transportation services?
2. What is the cost and availability outlook for warehousing facilities?
3. What is the cost and availability outlook for financial resources?
4. How effective are the company's advertising agencies and marketing research firms?

## PART V. MARKETING PRODUCTIVITY AUDIT

### A. Profitability Analysis

1. What is the profitability of the company's different products, markets, territories, and channels of distribution?
2. Should the company enter, expand, contract, or withdraw from any business segments and what would be the short and long-run profit consequences?

### B. Cost-Effectiveness Analysis

1. Do any marketing activities seem to have excessive costs? Can cost-reducing steps be taken?

## PART VI. MARKETING FUNCTION AUDITS

### A. Products

1. What are the product-line objectives? Are these objectives sound? Is the current product line meeting the objectives?
2. What products should be phased out from the product line?
3. Which products should be added to the product line?
4. Which products should be improved (quality, features, image)?

### B. Price

1. What are the pricing objectives, policies, strategies, and procedures? To what extent are prices set on cost, demand, and competitive criteria?
2. Do the customers see the company's prices as being in line with the value of its offer?
3. Does the company proceed with appropriate promotional discounts?

### C. Distribution

1. What are the distribution objectives and strategies?
2. Is there adequate market coverage and service?
3. Should the company consider changing its distribution channels?

C. Interface Efficiency

1. Are there any conflicts between marketing and manufacturing?
2. What are the relations between marketing and R&D?
3. Between marketing and finance?
4. Between marketing and purchasing?

**PART IV. MARKETING SYSTEMS AUDIT**

A. Information System

1. Is the marketing information system producing accurate, sufficient, and timely information?
2. Is marketing research used for decision making?

B. Planning Systems

1. Is the marketing planning system well conceived and effective?
2. Is sales forecasting and market potential measurement soundly carried out?
3. Are sales quotas set on a proper basis?

C. Control System

1. Are control procedures (monthly, quarterly) adequate to ensure that the annual-plan objectives are being achieved?
2. Does management periodically analyze the profitability of products, markets, territories, and channels of distribution?
3. Are marketing costs periodically examined?

D. New-Product-Development System

1. Is the company well organized to gather, generate, and screen new-product ideas?
2. Does the company do adequate concept research and business analysis before investing in new ideas?
3. Does the company carry out adequate product and market testing before launching new products?

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D. Sales force

1. What are the organization's sales-force objectives?
2. Is the sales force large enough to accomplish the company's objectives?
3. Is the sales force organized along the proper principles of specialization (territory, market, product)?
4. Does the sales force show high morale, ability, and effort?
5. Are the procedures adequate for setting quotas and evaluating performances?
6. How does the company's sales-force compare to competitors' sales forces?

E. Advertising, Sales Promotion, and Publicity

1. What are the organization's advertising objectives? Are they sound?
2. Is the right amount being spent on advertising? How is the budget determined?
3. Are ad themes and copy effective? What do customers and the public think about the advertising?
4. Are the advertising media well chosen?
5. Are sales promotion techniques used by the company? Are they well conceived?
6. Does the company have a well-formulated publicity program?

## INTERNATIONAL MARKET RISK

Business activities in international markets and ventures with foreigners contain risks that do not normally exist in domestic markets. These come from the unique character of foreign markets and includes:

**POLITICAL RISK:** This is caused by differing systems of laws and regulations existing in different countries. More important, because foreign governments have sovereignty over their markets and business environment, they can change laws and regulations easily and governments may change. The analysis of political risk anticipates these changes and differences.

**ECONOMIC RISK:** This is caused by differing economic systems in foreign countries and by the need to conduct transactions in foreign exchange. Finance markets can help reduce economic risk.

**CULTURAL RISK:** This is caused by differing behaviors and attitudes of foreigners. It is particularly difficult to manage as it evolves our basic understanding of time, space and relationships. Although we can translate verbal communication, other aspects of interpersonal relations are hard to translate and may cause serious misunderstandings.

## APPENDIX II

### Training Evaluations

Timisoara 8 Mar 94

1. Instructor: 5.0  
Content: 4.8
2. **What did you like most at this seminar?**  
Good intentions of the instructor.  
The quality and style of the presentation.  
The concrete observations and the way the discussions were carried on.  
The behavior of the trainer.  
The critiques of the company presentations.  
The information given concerning marketing.  
The instructor worked to understand participant needs.
3. **Would you recommend this seminar to others? Yes / No, Why?**  
Yes x 14
4. **Is there anything that you would like to add to this seminar?**  
More practical examples from the market economy.  
More examples from successes of underdeveloped countries.  
More information about the American market.  
It is hard to say because this is the first seminar of this kind.  
Is it possible to contact investors?  
The video part.  
I know it is hard, but I would like something concrete about Iprotim.
5. **Would you like to tell something to the trainers?**  
Thank you for your effort and willingness x 4.  
Thank you for the opportunity to learn.  
Thank you x 3.
6. **For the future, what topics would you like in seminars?**  
Come and visit us and then we will see.  
Privatization x 2.  
Marketing x 5.  
Management x 2.  
A program that will change the mentalities of our people.  
Management of costs.  
Responsibilities.

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Bucharest 11 Mar 94

Evaluations being summarized in Romania.

### APPENDIX III

#### Schedule of Activities

- Friday, 4 March: Departed Pullman.
- Saturday, 5 March: Arrived Bucharest and planned program with COP.
- Sunday, 6 March: Attended Peace Corps Business training session at Sinaia.
- Monday, 7 March: Meetings with Rector and Management Chair at Polytechnic University. Visit to ASE Center and meeting with Professor Urasaki, Director. Meeting with GAO and volunteer organizations directors at USAID.
- Tuesday, 8 March: Travel to Timisoara: Conducted training sessions at Timisoara Polytechnic business center.
- Wednesday, 9 March: Visits and consultancies with local companies. Consultant training. Meeting with the Head of Management at Timisoara Polytechnic.
- Thursday, 10 March: Return to Bucharest. Visits to Polytechnic center and to Black Sea University. Attended reception for business consultants from other projects.
- Friday, 11 March: Training sessions at Bucharest Polytechnic business center.
- Saturday, 12 March: Report Preparation.
- Sunday, 13 March: Visit to Constanta.
- Monday, 14 March: Visits and consultancy with local company. Debriefing with project team.
- Tuesday, 15 March: Departure from Bucharest.

D. Forța de muncă din compartimentul vânzări

1. Care sunt obiectivele acesteia?
2. Este ea suficientă pentru atingerea obiectivelor companiei?
3. Este ea organizată conform principiilor specializării? (teritoriu, piață, produs)
4. Dă ea dovadă de calități morale, diplomație și dorință de muncă?
5. Sunt procedurile corespunzătoare stabilirii cotelor și evaluării performanțelor?
6. Cum se comportă ea în comparație cu cea a concurenților?

E. Reclama, promovarea și publicitatea

1. Care sunt obiectivele companiei de reclamă a organizației? Sunt acestea serioase?
2. Se cheltuiesc sumele corespunzătoare pentru reclamă? Cum se stabilește bugetul?
3. Sunt tema și prezentarea reclamei eficace? Care este părerea clienților și publicului despre acestea?
4. Sunt mijloacele de mediatizare bine alese?
5. Folosește compania tehnici de promovare? Sunt acestea bine alese?
6. Are compania un program de publicitate bine formulat?

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## RIScul PE PIATA INTERNATIONALA

Activitățile de afaceri pe piețele internaționale și în societăți mixte cu străini conțin riscuri care în mod normal nu există pe piețele interne. Aceste riscuri izvorăsc din caracterul unic al piețelor externe și includ:

**RIScul POLITIC:** cauzat de sisteme diferite de legi și reglementări existente în diverse țări. Mai important, datorită suveranității guvernelor străine pe piețele lor, și asupra mediului de afaceri, guvernele pot schimba legile și reglementările cu ușurință, însăși guvernele se pot schimba. Analiza riscurilor politice anticipează aceste schimbări și diferențe.

**RIScul ECONOMIC:** cauzat de diferența între sistemele economice în țările străine și de necesitatea de a conduce tranzacțiile în schimbul cu străinătatea. Piețele financiare pot ajuta la reducerea riscurilor economice.

**RIScul CULTURAL:** cauzat de diferența în comportamentul și atitudinile străinilor. Efectiv este dificil să te descurci dacă este implicată ca bază înțelegerea asupra timpului, spațiului și relațiilor. Deși putem traduce comunicarea verbală, alte aspecte ale relațiilor interpersonale sunt dificil de tradus și pot crea serioase neînțelegeri.

## THE CONCEPTS

### 1. The Production of Product Concept

The production concept holds that consumers will favor those products that are widely available and low in cost. Management in production-oriented organizations concentrates on achieving high production efficiency and wide distribution coverage.

The product concept holds that consumers will favor those products that offer the best quality at a given price. The task is to improve the quality level.

### 2. The Distribution Concept

The distribution concept holds that failure to adequately satisfy market demands results from the maldistribution of goods and services, and that investment in the development of distribution infrastructure will insure consumer satisfaction.

### 3. The Selling Concepts

The selling concept holds that consumers, if left alone, will ordinarily not buy enough of the organization's products. The organization must therefore undertake an aggressive selling and promotion effort.

### 4. The Marketing Concept

The marketing concept holds that the key to achieving organizational goals consists in determining the needs and wants of target markets and delivering the desired satisfaction more effectively and efficiently than competitors.

This leads to a definition of Marketing as human activity with the purpose of satisfying human needs and wants thorough exchange. To satisfy these needs, products are offered on the market within a marketing program using a variety of elements of communication, distribution, and pricing to attempt to satisfy consumer needs and wants.

**EXERCISE:** Discuss which concepts apply in Romania. Does the perspective taken influence the marketing approach.



## PARTEA V. EVALUAREA PRODUCTIVITĂȚII ACTIVITĂȚII DE MARKETING

- A. Analiza profitabilității
1. Care este profitabilitatea diferitelor produse, piețe, teritorii și canale de distribuție ale companiei?
  2. Este indicat ca întreprinderea să intre, să se extindă, să-și restrângă activitatea, sau să părăsească un anumit segment al afacerii? Care ar fi consecințele pe termen lung și pe termen scurt ale acestei decizii?
- B. Analiza eficienței
1. Presupune vreuna dintre activitățile de marketing costuri excesive? Pot fi luate măsuri de reducere a costurilor?

## PARTEA VI. EVALUAREA FUNCȚIILOR MARKETINGULUI

- A. Produse
1. Care sunt obiectivele profilului de fabricație? Sunt aceste obiective serioase? Corespunde profilul de fabricație obiectivelor?
  2. Ce produse trebuie excluse din profilul de fabricație?
  3. Ce produse trebuie introduse în profilul de fabricație?
  4. Ce produse trebuie îmbunătățite (calitate, caracteristici, imagine)?
- B. Preț
1. Care sunt obiectivele, politicile, strategiile și procedurile legate de stabilirea prețului? În ce măsură sunt prețurile stabilite pe baza costului, cererii și criteriilor de concurență?
  2. Sunt clienții de părere că prețul reflectă corect valoarea ofertei?
  3. Folosește compania o politică promoțională adecvată de reducere a prețurilor?
- C. Distribuția
1. Care sunt obiectivele și strategiile de distribuție?
  2. Sunt satisfacerea necesităților pieței și serviciile oferite corespunzătoare?
  3. Ar trebui compania să se gândească la modificarea canalelor de distribuție?

- C. Eficiența interfetei
1. Există conflicte între marketing și producție?
  2. Care sunt relațiile dintre Marketing și Cercetare Dezvoltare?
  3. Între marketing și finanțe?
  4. Între marketing și aprovizionare?

#### PARTEA IV. EVALUAREA SISTEMELOR DE MARKETING

- A. Sistemul informațional
1. Furnizează sistemul informațional informații veridice, suficiente și prompte?
  2. Este cercetarea de piață folosită în luarea deciziilor?
- B. Sistemul de planificare
1. Este sistemul de planificare a activității de marketing bine structurat și eficient?
  2. Sunt previzionarea vânzărilor și măsurarea potențialului de piață realizate în mod temeinic?
  3. Sunt cotele de vânzări stabilite pe baze reale?
- C. Sistemul de control
1. Sunt procedurile de control (lunare, trimestriale) adecvate astfel încât să fie asigurată atingerea obiectivelor anuale planificate?
  2. Analizează conducerea în mod periodic profitabilitatea produselor, piețelor, zonelor geografice, și canalelor de distribuție?
  3. Sunt costurile de marketing examinate periodic?
- D. Sisteme de dezvoltare a noilor produse
1. Este compania organizată de așa manieră încât să fie favorizate colectarea, generarea și conturarea ideilor privitoare la produse noi?
  2. Sunt precedate investițiile efectuate pentru punerea în practică a unor idei noi de o temeinică cercetare funcțională și analiză a afacerii?
  3. Sunt produsele noi și piața suficient testate înainte de lansarea noilor produse?

## PARTEA II. EVALUAREA STRATEGIEI DE MARKETING

### A. Obiective

1. Sunt obiectivele globale ale corporației formulate clar?
2. Sunt obiectivele globale și cele de marketing ierarhizate clar, astfel încât să permită elaborarea planurilor și evaluarea performanțelor? Derivă ele în mod logic din scopurile politicii generale?
3. Sunt obiectivele de marketing stabilite conform poziției concurențiale a companiei, resurselor și oportunităților?

### B. Strategia

1. Ce strategie de marketing s-a adoptat pentru realizarea obiectivelor? Este ea corespunzătoare?
2. S-au alocat suficiente resurse pentru îndeplinirea obiectivelor de marketing?
3. Sunt resursele de marketing alocate optim în funcție de elementele marketing mix-ului?

## PARTEA III. EVALUAREA ORGANIZĂRII ACTIVITĂȚII DE MARKETING

### A. Structura formală

1. Există un angajat al serviciului de marketing care coordonează activitățile de care depinde satisfacția clienților?
2. Sunt responsabilitățile de marketing structurate optim d.p.d.v. funcțional, al produsului, al consumatorului final și teritorial?
3. Există grupuri în activitatea de marketing care au suplimentar nevoie de pregătire, motivație, supraveghere, sau evaluare?

### B. Eficiența funcțională

1. Există relații de comunicare și de lucru între marketing și vânzări?
2. Managementul produsului funcționează eficient". Iși planifică managerii profitul, sau numai volumul vânzărilor?
3. Există grupuri de marketing care au nevoie de pregătire, motivație sau evaluare suplimentară?

## STATES OF DEMAND

No ideal demand exists for all of the products. Eight categories of demands can be identified for which the corresponding task is different:

- 1) Negative demand
- 2) No demand
- 3) Latent demand
- 4) Falling or Weak demand
- 5) Irregular demand
- 6) Full demand
- 7) Overfull demand
- 8) Externally Derived demand

**EXERCISE:** Identify products which exhibit each of the above demand states. Be prepared to explain why you feel that type of demand exists for each product.

put emphasis on knowing clients

On a more general level, firms should be counselled to:

develop plans (both strategic and tactical). It might be useful to have participants write mission statements for analysis.

concentrate on specifics rather than details. Present financial data in conventional useable formats.

present clear and easily communicated goals. These goals should be realistic.

be able to explain their organization, markets, and operations. They should be encouraged to develop an organizational chart and job descriptions for key personnel.

#### Sustainability:

If there is to be any lasting impact of the CBE program, there must be incentive for the centers to continue to function and for the businesses to continue to participate. Although it is difficult to see how the centers can continue without external funding, encouragement of businesses can be accomplished. This should include providing examples of successful companies who achieved their goals through the centers. Additional rewards for participating in training and rewards for conducting additional training activities.

#### Other:

It would be helpful to provide consultants with terms of reference for consulting activities and a clear picture of activities to be undertaken. My task seemed to evolve during my brief stay and I was a little confused about my role at the outset.

#### CONCLUSION

This was an interesting and, I think, productive activity. I believe I was able to reach a relatively large number of participants and have some limited impact. This is a good project, blessed with good leadership and enthusiastic people. I hope it can be continued.

APPENDIX I

Training Documentation

## CONCEPTE

### 1. Conceptul "producție" și conceptul de "produs"

Conceptul "producție" statuează atitudinea favorabilă a consumatorilor față de acele produse larg accesibile și cu costuri scăzute. Managementul organizațiilor orientate spre producție se concentrează asupra realizării unei înalte eficiențe a acesteia și asupra unei arii întinse de distribuție.

Conceptul "produs" prezintă atitudinea favorabilă a consumatorilor față de produsele care au cea mai înaltă calitate la un anumit preț. Sarcina este aceea de îmbunătățire a calității.

### 2. Conceptul "distribuție"

Conceptul "distribuție" arată că eșecul în satisfacerea cerințelor pieței este determinat de distribuția inadecvată a bunurilor și serviciilor și că investițiile pentru dezvoltarea infrastructurii de distribuție vor contribui la asigurarea satisfacției consumatorilor.

### 3. Conceptul "vânzări"

Conceptul vânzări arată că de obicei clienții nu cumpără suficiente produse de la organizație din proprie inițiativă. De aceea este necesar un intens efort de promovare și vânzări din partea acesteia.

### 4. Conceptul "marketing"

Conceptul "marketing" arată că succesul în atingerea scopurilor organizației o impune depistarea necesităților și dorințelor în cadrul pieței vizate și totodată satisfacerea acestora mai eficientă și eficace față de concurenți.

Toate aceste concepte conduc la definirea Marketingului ca fiind activitatea umană care are ca scop satisfacerea necesităților și dorințelor oamenilor, prin intermediul schimbului. Pentru a satisface aceste necesități și dorințe, produsele sunt oferite pe piață în cadrul unui program de marketing care folosește o multitudine de elemente de comunicare, distribuție și stabilire a prețului.

**EXERCITIU:** Arătați care dintre concepte este aplicabil în România. Influențează realitatea existentă abordarea marketingului?

## CATEGORII DE CERERE

Nu există o cerere ideală pentru toate produsele. Pot exista opt categorii de cerere pentru care sarcinile corespunzătoare sunt diferite.

- 1) Cerere negativă
- 2) Cerere inexistentă
- 3) Cerere latentă
- 4) Cerere în scădere sau slabă
- 5) Cerere neregulată
- 6) Cerere completă
- 7) Supracerere
- 8) Cerere îndreptată spre exterior

EXERCITIU: Identificați produsele la care se înregistrează fiecare dintre tipurile de cerere de mai sus. Explicați de ce credeți că la aceste produse există tipul respectiv de cerere.



## MARKETING MIX-UL

Marketing mix-ul este format din patru elemente de strategie care conlucrează în vederea satisfacerii necesităților unui segment de populație, identificat ca piață vizată. Elementele marketing mix-ului sunt:

1. Produsele
2. Prețurile
3. Comunicația
4. Sistemele de distribuție

EXERCITIU: Identificați o anumită piață vizată în România și propuneți un marketing mix capabil să satisfacă necesitățile respectivului segment.

Combinăția dintre piețele vizate și marketing mix-urile dintr-o anumită companie, devine programul de marketing al acesteia.

EXERCITIU: Folosind exemplul unui produs pentru care cererea se încadrează în orice categorie de cerere în afara celei complete, elaborați un program de marketing destinat corectării situației respective.

EXERCITIU: Folosiți chestionarul anexat pentru a elabora o evaluare a programului de marketing din organizația dumneavoastră.

# EVALUARE ACTIVITAȚII DE MARKETING

## PARTEA I. EVALUAREA MEDIULUI

### MICROCLIMATUL

#### A. Economic și demografic

1. Ce evoluții majore ale venitului, prețurilor, economiilor și creditelor vor afecta compania?
2. Ce modificări demografice importante (mărimea, piramida vârstei, distribuția geografică) vor afecta compania?

#### B. Tehnologic

1. Ce schimbări demne de luat în considerație apar în ceea ce privește tehnologia și procesul de fabricație al produsului?
2. Ce produse substituibile ar putea înlocui produsul?

#### C. Politic

1. Care dintre legile propuse spre aprobare ar putea afecta strategia și tacticile de marketing?
2. Care dintre acțiunile statului sau dintre cele locale ar trebui urmărite? Ce se întâmplă în ceea ce privește controlul poluării, posibilitățile de angajare, protecția muncii, reclama, controlul prețurilor etc? Care sunt implicațiile tuturor acestor domenii asupra strategiei de marketing?

#### D. Culturale

1. Care este atitudinea publicului față de afaceri și față de produsele fabricate de companie?
2. Care dintre schimbările care au loc în stilul de viață și sistemul de valori al clienților au impact asupra pieței vizate de companie și a metodelor de marketing?

## TASK ENVIRONMENT

### A. Piete

1. Ce se întâmplă cu dimensiunea pieței: creșterea, distribuția geografică, distribuția și profiturile.
2. Care sunt segmentele de piață cele mai importante și cum evoluează acestea? Care sunt piețele potențiale tari/slabe?

### B. Clienți

1. Care este opinia clienților actuali și potențiali despre reputația, calitatea produselor și serviciilor, desfacerea și prețurile companiei dumneavoastră, vis-a-vis de cea despre concurenții dvs.
2. Cum iau diferitele segmente de clienți decizia de a cumpăra?
3. Care sunt necesitățile și dorințele consumatorilor din piața respectivă?

### C. Concurenții

1. Care sunt principalele canale comerciale prin care produsele ajung la clienți?
2. Ce tendințe apar în rândul furnizorilor în ceea ce privește modul lor de a vinde?

### D. Facilitatori și firme de marketing

1. Care este costul și disponibilitatea serviciilor de transport?
2. Care este costul și disponibilitatea spațiilor de depozitare?
3. Care este costul și existența resurselor financiare?
4. Cât de eficace sunt agențiile de reclamă și firmele de marketing?