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**COURSE:** BUS 478, Section E100 **INSTRUCTOR:** Jerry Sheppard

**TITLE:** Strategy Office: WMC 4387

**SEMESTER:** Spring 2024 (1241) Hours: Tuesday: 15:40 – 16:20

**CLASSROOM:** E100 (Room to be posted) Tuesday, 16:30 Thursday: 10:40 – 11:20 D400 (Room to be posted) Thursday, 11:30 Phone: 778-782-4918

E-mail: sheppard@sfu.ca

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***Pre-requisites****:*

Bus. 207, (or Econ. 201 or Econ. 301), Bus. 312, 343, 360W & 374 or 381, all with a grade of C- or better, & 90 credits.

***Objectives***

1. Develop a capacity to think strategi­cally about a firm, its business posi­tion, how a firm can gain a competi­tive advan­tage.
2. Conduct strategic anal­yses in a range of indus­tries, firms and situa­tions to develop a grasp of the com­peti­tive trials of a global envi­ron­ment.
3. Get acquainted with managerial tasks related to strategy formula­tion, and what managers can do to pro­mote competent implementation.
4. Integrate knowledge from other courses to see how business functions fit together and why all parts of a firm need to be managed in harmony.

***Textbook***

Hitt, Ireland & Hoskisson, *Strategic Management, Competitiveness and Globalization,* *Concepts,* 12th edition or later. Cengage. ISBN: 9781305502208.

***Grades***

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Individual Written Grades | | | |  | |
|  |  | | Strategy Formulation . . . . . . . . . . . . . . . . . . . | | 16% | |
|  |  | | Integrate- Recommend- Implement . . . . . . . | | 16% | |
|  |  | | Written Executive Summary . . . . . . . . . . . . . | | 16% | |
|  |  | Individual Participation Grades | | | |  | |
|  |  | | | Participation . . . . . . . . . . . . . . . . . . . . . . . . . | 11% | |
|  |  | | | Presentation Performance . . . . . . . . . . . . . | 7% | |
|  |  | | | Peer Evaluated Group Contribution . . . . . . | 6% | |
|  |  | Group Work Grades | | | |  | |
|  |  | | | Written Case Synopsis . . . . . . . . . . . . . . . . . | 8% | |
|  |  | | | Case Presentation . . . . . . . . . . . . . . . . . . . . | 10% | |
|  |  | | | Written Executive Summary . . . . . . . . . . . . | 10% | |

***Class participation***

Group participation and a positive contribution to class discussion are inte­gral parts of the course; *coming to class is not enough!* Attend­ance ac­counts but contribution to discussion ac­counts more. The best way to contribute is to be prepared by reading the material in advance and saying some­thing in class. Keep in mind that the quality of your contri­bution will also be evaluated.

***Individual Analyses & Executive Summary***

Individual firm strategic formulation and implementa­tion analyses, along with an Executive Sum­mary are on the ***Coop*** case.The case is an introduction to the firm; you should do additional research to update and com­plete, as much as pos­sible, in­formation on the busi­ness. Your anal­yses should use the doc. files linked to “Blank strategy for­mulation template” and “Blank in­tegra­tion, rec­ommendation and implemen­tation tem­plate” available on the class Bus. 478 Canvas website.

***Group work***

You’ll form groups of four to six people in the first week. Groups should have folks who have a range of skills, and can work well together.

You will be evaluating others in the group. The average grade for the group is to be 3.1. If you choose not to fill out a grade form, all group members will receive a 3.15.

Groups also write a 5-8 page synopsis of a firm of your choice covering firm history, envi­ron­ment, current state & main strategic chal­lenges. At the term’s end groups present a 30-min. anal­ysis of the firm. Groups then have two days to complete a written Executive Summary of their analysis.

***Session Breakdown***

Most sessions include a short ‘Essentials’ lecture on main chapter points, a strategy based exercise and / or a case (a 20%, 40% 40% split).

If you want them more in-depth coverage of the concepts, you can find full con­cepts chapter lectures. These are Power Point presentations with audio that plays once you start the slide show & when prompted you have to click ‘NEXT’ to get to the next point.

***Ethical Considerations***

You must do your own work on individual as­sign­ments. Failure to do so, plagiarism, or insuf­ficient citation may result in a zero for the assign­ment.

***Course Coverage***

The onus is on students for discussion; the professor’s role is to facilitate. To this end the goal is to ex­pose you to many organizations and strategies.

***Schedule***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Class** | **Topic Detail** | **Tasks** | **Hand in** |
| **Formulation & Integration** | Tue. Jan. 09 | Intro. to Strategic Management. Strategy Case Analysis. | Read Chapter 1. Look over the Case PowerPoint Slides. |  |
| Tue. Jan. 16 | External & Internal Environment. | Read Chapters 2 and 3. Prepare to discuss The IMI Case. |  |
| F r i . Jan. 19 | Group lists. | Hand in Group lists. | **Group Lists** |
| Tue. Jan. 23 | Business Level Strategy. Corporate Level Strategy | Read Chapters 4 and 6.  Prepare to discuss the in class Exercises A & B on the RV Industry. |  |
| Tue. Jan. 30 | Competitive Rivalry & Dynamics. International Strategy. | Read Chapters 5 and 8  Prepare to discuss The Tom’s Case. |  |
| Tue. Feb. 06 | Cooperative Strategy. | Read Chapter 9  Prepare to discuss the Carlsberg Case. Devise a critique of the Carlsberg slides. |  |
| Thur. Feb. 08 | Formu­lation Analysis. | Hand in Individual Formu­lation Analysis. | **Formu­lation analysis for Coop** |
| Tue. Feb. 13 | Organization Structure and Controls. | Read Chapter 11. Prepare to discuss the Deepwater Horizon Case. |  |
| Tue. Feb. 27 | Restructuring. | Read Chapter 7. Prepare to discuss Exercise C: A to Z. |  |
| **Implementation** | Thur. Feb. 29 | Individual Integration, Recommendation & Implementation Analysis. | Hand in individual Integration, Recommendation and Implementation Analysis. | **Coop integration, recommendation & implementation** |
| Tue. Mar. 05 | Corporate Governance. | Read Chapter 10. Prepare to discuss Exercise D: Bayer. |  |
| Tue. Mar. 12 | Leadership. | Read Chapter 12.  Prepare to discuss the Vestas Case |  |
| Thur. Mar. 14 | Individual Executive Summary | Hand in Individual Executive Summary. | **Coop Exec. Sum.** |
| Tue. Mar. 19 | Strategic Entrepreneurship. The Future. | Read Chapter 13 and the article*How to do Strategic Planning like a Futurist.*[[1]](#footnote-1)\* Prepare to discuss Exercise E: Futures. |  |
| Thur. Mar. 21 | Group Case Synopsis | Group Case Synopsis. | **Group Synopsis** |
| **Ends** | Tue. Mar. 26 | **Case Presentations** | Case Presentations |  |
| Thur. Mar. 28 | Group Executive Summary | Group Executive Summary | **Group Exec. Sum.** |
| Tue. Apr. 02 | **Case Presentations** | Case Presentations |  |
| Thur. Apr. 04 | Group Executive Summary | Group Executive Summary | **Group Exec. Sum.** |
| Tue. Apr. 09 | **Case Presentations** | Case Presentations |  |
| Thur. Apr. 11 | Group Executive Summary | Group Executive Summary | **Group Exec. Sum.** |

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Bus 478 Group Selection

COURSE: BUS 478-3 INSTRUCTOR: Dr. J. Sheppard

TITLE: Strategy Office: WMX 4387

E-mail: sheppard@sfu.ca

NOTES: http://www.sfu.ca/~sheppard/index.html Phone: 778-782-4918

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| --- | --- | --- | --- |
| **Title** | **Name** | **Last 4 Digits of Student ID #** | **Concentration** |
| ***Chief Executive Officer*** |  |  |  |
| ***Chief Operations Officer*** |  |  |  |
| ***Chief Marketing Officer*** |  |  |  |
| ***Chief Financial Officer*** |  |  |  |
| ***Chief of Human Resources***  *If you have one* |  |  |  |
| ***Chief Information Officer***  *If you have one* |  |  |  |

**Preferences**

|  |  |  |  |
| --- | --- | --- | --- |
| ***First Choice*** | **November 20 / 21** | **November 27 / 28** | **December 04 / 05** |
| ***Second Choice*** | **November 20 / 21** | **November 27 / 28** | **December 04 / 05** |
| ***Third Choice*** | **November 20 / 21** | **November 27 / 28** | **December 04 / 05** |

**Comments**

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**Formulation Analysis Evaluation**

|  |  |  |
| --- | --- | --- |
| ***Section of report*** *Range is 0.0 –4.4* | Form | **Content** |
| Mission, Objectives, Goals, stakeholders | * Updated Information * Current Mission * Goals & Objectives * Stakeholders | * If case info. needs updating, update it and bring the audience/reader up to speed. * Provide the firm’s current Mission & Goals. * Who’re the stakeholders & what do they want? |
| General and Industry Environment | * Macro Environment (Demographics, Economy, etc.) * Industry Environment (Porter’s 5) * Competitors (top 3 or so) * What are the industry dynamics | * Clearly outline these elements. * Industry dynamics include the likelihood of competitor attach and response and the form these attacks and responses are likely to take given conditions in the environment |
| Resources and Capabilities / Core Competencies | * Resources (Tangible / Intangible) * Capabilities (by Functional Area) * Core Competencies (VIRO) * Performance | * Details will be needed (e.g. you should say “Their physical plant is the most modern and efficient in the industry and it allows them to….” rather than simply listing “physical Plant” under a list of tangible resources). |
| Business, Corp. and International Strategies | * Business Level Strategy * Corporate Level Strategy * International Strategy * Cooperative Strategy | * Tell me what is their: * Generic Bus. level strategy is (Cost Leadership, Diff, Focus, etc.) * Corp. level strategy (Conglomerate, Vert. Integration Single bus., etc.) * International Strategy (Global, Transnational, Multidomestic). * Any Joint Ventures, etc. |
| Average |  |  |

**Integration, Recommendation and Implementation Analysis Evaluation**

|  |  |  |
| --- | --- | --- |
| ***Section of report*** *Range is 0.0 –4.4* | Form | **Content** |
| Synthesis | Firm Strengths & WeaknessesEnviro. Opportunities & ThreatsSWOT MatrixDoes the strategy fit the SWOT | * Summarize not only the strengths & weaknesses / opportunities & threats but relate them to each other – how does all that you’ve said so far fit together. |
| Selecting a Course of Action | * Criteria by which you will evaluate a good recommendation. * Recommendation. * Targets and Goals * Evaluation of Recommendations. | * Tell me what challenges a good recommendation will address. * Have a definitive recommendation. * Tell me what are the targets of your recommendations. * Tell me how your recommendations meet your criteria and potential targets. |
| Implementation | * Describe an Action Plan for implementation * Discuss the logic of Action Plan * Are any new organizational structure or controls needed * Criteria to evaluate change success. | * Logical & appropriate Action Plan for imple­menting your recommendations (1st this, then) * Review any new organizational structure or controls needed * Criteria by which you will evaluate whether the change was successful. |
| Remaining Considerations | * Cover * References * Figures (like organization charts or time lines) * Tables. | * Cover has all the relevant elements (ID’s, Art). * Sufficient consistently properly presented alphabetical references. * Sufficient labeled clearly presented figures. * Sufficient labeled clearly presented figures. |
| Average |  |  |

**Executive Summary Evaluation**

|  |  |  |
| --- | --- | --- |
| ***Section of report*** *Range is 0.0 –4.4* | Form | **Content** |
| Introduction | Format allows quick access to info.  Compelling statement of interest.  Analysis goals and objectives.  Recommended strategy. | * Explains what the firm does. * There’s a compelling interest statement. * Does it note goals of the analysis? * Does it include a recommended strategy? |
| The Problem or Challenge | Opportunities & threats (competitor, industry and macro environment).  Strengths & limitations (resources, capabilities & core competencies). | Clearly discuss these elements:  Opportunities & threats (competitor, industry and macro environment).  Strengths & limitations (resources, capabilities & core competencies). |
| The Solution | Obvious & clear action statements.  Clear outline of action steps.  Clear timeline.  Clearly stated goals. | What do you want to the firm to do?  What steps need to be taken (logical & appropriate action plan for implementation).  How soon do we start; with what steps?  How will we measure success (criteria by which you evaluate success of changes). |
| Why Now | External circumstances driving change.  Internal resources for recommendation.  Compelling statement of urgency. | Explain:  External circumstances driving change.  Internal resources for recommendation.  Why change now? |
| Average |  |  |

**Executive Summary Outline**

No more than one page, no cover, citations, or table of contents, no less than 11 point, New Times Roman, no less than ½-inch margins, and 1.25 spacing (in *Word*, Home 🡪 Paragraph 🡪  🡪 Line Spacing 🡪 Multiple 🡪 type in 1.25 ). Mix any tables and figures into the text as they are mentioned.

INTRODUCTION

* Explain what the firm does.
* There’s a compelling interest statement.
* Does it note goals of the analysis?
* Include a recommended strategy?

The Problem / Challenge

Clearly discuss these elements:

* Opportunities & threats (competitor, industry and macro environment).
* Strengths & limitations (resources, capabilities & core competencies).

The Solution

* What do you want to the firm to do?
* What steps need to be taken (logical & appropriate action plan for implementation).
* How soon do we start; with what steps?
* How will we measure success (criteria by which you evaluate success of changes).

Why Now

Explain:

* External circumstances driving change.
* Internal resources for recommendation.
* Detail the need for change now.

**Group Presentation Evaluation**

|  |  |  |  |
| --- | --- | --- | --- |
| Sections | Comments / Questions | — Grade — | |
| Form | Content |
| 1. Describe the main challenges / |  |  |  |
| problems for the organization. |
| (A get-to-the-point overview.) |
|
| 2. Show an analysis backing how you |  |  |  |
| arrived at your conclusion of what |
| the organizational challenges are |
| (Mainly an external analysis.) |
| 3. Tell me what resources & |  |  |  |
| capabilities the organization has |
| that help address the challenges / |
| problems for the organization. |
| 4. Tell me what restraints the |  |  |  |
| organization has to limit its actions. |
|  |
| 5. Sum-up the above by telling what |  |  |  |
| a good recommendation does. |
| (Criteria for good recommendation.) |
|
| 6. Make a recommendation that is |  |  |  |
| clear and achievable. |
|  |
| 7. Explain an implementation schedule, |  |  |  |
| showing a sense of urgency. |
|  |
| 8. Show me what things will look |  |  |  |
| like when you are done. |
| (i.e. how you measure success). |
|
| 9. Address the questions raised. |  |  |  |
| Average |  |  |  |

**Individual Presentation Grade is based on:**

Cogent Content . . . . . . . . Did what you discuss make sense and support the analysis?

Confidence . . . . . . . . . . . Did you seem self-assured about what you were saying?

Enthusiasm . . . . . . . . . . . I'm not looking for cheerleading but at least seem interested!

Volume and Clarity . . . . . Were you loud & clear enough to be heard & understood in the back?

Attention to Audience . . . Did you make eye contact with the whole audience, not just the prof.?

Rehearsed . . . . . . . . . . . . You can use notes but look up occasionally and keep your place.

STUDENT INPUT FOR CLASS Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PARTICIPATION GRADE (Due last Class) Student # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

General attendance A+ A A- B+ B B- C+ C C- D F

(Missed Classes) 🄋 🄋 🄋 ➀ ➁ ➂ ➃ ➄ ➅ ➆ ➇ Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_

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On-time attendance A+ A A- B+ B B- C+ C C- D F

(Late Classes) 🄋 🄋 🄋 ➀ ➁ ➂ ➃ ➄ ➅ ➆ ➇ Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_

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Minutes of Sleep or work A+ A A- B+ B B- C+ C C- D F

on other class classwork 🄋 ➀ ➁ ➂ ➃ ➄ ➅ ➆ ➇ ➈ ➉ Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Contribution Quantity A+ A A- B+ B B- C+ C C- D F

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Contribution Quality A+ A A- B+ B B- C+ C C- D F

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Other (Specify) A+ A A- B+ B B- C+ C C- D F

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Bus 478 Group Evaluation

**Group \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Grades range from 0.0 - 4.4.*** | ***Fill in only the column that applies to your group*** | | | ***Comments*** |
| ***Title*** | ***4 Person Group*** | ***5 Person Group*** | ***6 Person Group*** |  |
| ***CEO:*** |  |  |  |  |
| ***COO:*** |  |  |  |  |
| ***CMO:*** |  |  |  |  |
| ***CFO:*** |  |  |  |  |
| ***CHR:*** |  |  |  |  |
| ***CIO:*** |  |  |  |  |
| ***Total:*** | ***12.4*** | ***15.5*** | ***18.6*** |  |

1. \* This can be found at https://hbr.org/2019/07/how-to-do-strategic-planning-like-a-futurist [↑](#footnote-ref-1)