



BEEDIE SCHOOL OF BUSINESS

SIMON FRASER UNIVERSITY

COURSE: BUS 478, Sections D400, D500 and D700
TITLE: Strategy
SEMESTER: Spring 2025 (1251)
CLASSROOM: D400 WMC 3250 Monday, 9:30 – 12:20
D500 WMC 3510 Monday, 2:30 – 5:20
D700 WMC 3250 Tuesday, 2:30 – 5:20

INSTRUCTOR: Jerry Sheppard
Office: WMC 4387
Hours: Monday: 12:45 – 2:15
Tuesday: 1:40 – 2:20
Phone: 778-782-4918
E-mail: sheppard@sfu.ca

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, & Harrison *Strategic Management, Competitiveness & Globalization, Concepts*, 12th edition or later. Cengage. The 14th E Edition ISBN is 9780357716878.

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 Exec. Summary are on the **Pandora** case. The case is an introduction to the firm; you should do added 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 and at https://drive.google.com/file/d/1_c9BevS9g6CmXrYQszfuWz3-S4YwljB2/view for the case.

Scale Conversions

Scale conversions on all assignments are as follows:

$$\text{GPA Grade} = \% \text{ Grade} / 25$$

$$\% \text{ Grade} = \text{GPA scale} * 25$$

Group work

You'll form groups of four to six people in the first two weeks. 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 3.2.

Groups also write a 5-8 page synopsis of a firm of your choice covering firm history, environment, current state & main strategic challenges. At 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 have an 'Essentials' lecture on main chapter points, a strategy exercise or a case (a 33%, 67% split).

For Chapter 5 (or if you want more in-depth coverage of concepts) you can find full concepts chapter lectures Power Point slides with audio that plays once you start the slide show. To advance the slides, when prompted 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	Mon. Jan. 06 Tue. Jan. 07	Intro. to Strat. Management. Strategy Case Analysis.	Read Chapter 1. Look over the Case PowerPoint Slides.	
	Mon. Jan. 13 Tue. Jan. 14	External & Internal Environment.	Read Chapters 2 and 3. Prepare to discuss The IMI Case.	
	Fri. Jan. 17	Group lists.	Hand in Group lists.	Group Lists
	Mon. Jan. 20 Tue. Jan. 21	Business Level Strategy. Corporate Level Strategy	Read Chapters 4 and 6. Prepare to discuss Exercises A & B: the RV Ind.	
	Mon. Jan. 27 Tue. Jan. 28	At home material Competitive Rivalry & Dynamics.	Read Chapter 5 & Execute Audio Chapter 5 Power-point & Watch Online Word Lecture	No In-person Class
	Mon. Feb. 03 Tue. Feb. 04	Competitive Rivalry & Dynamics & International Strategy.	Read Chapter 8 Prepare to discuss The Tom's Case.	
	Mon. Feb. 10 Tue. Feb. 11	Cooperative Strategy.	Read Ch. 9/ Prepare to discuss the Carlsberg Case & critique of the Carlsberg slides.	
	Fri. Feb. 14	Formulation Analysis.	Hand in Individual Formulation Analysis.	Formulation analysis for Pandora
Implementation	Mon. Feb. 17 Tue. Feb. 18	Family Week		No Class
	Mon. Feb. 24 Tue. Feb. 25	Organization Structure and Controls.	Read Chapter 11. Prepare to review Deepwater Horizon.	
	Mon. Mar. 01 Tue. Mar. 02	Restructuring.	Read Chapter 7. Prepare to discuss Exercise C: A to Z.	
	Fri. Mar. 05	Individual Integration, Recommendation & Implementation Analysis.	Hand in individual Integration, Recommendation and Implementation Analysis.	Pandora integration, recommendation & implementation
	Mon. Mar. 10 Tue. Mar. 11	Corporate Governance & Leadership	Read Chapters 10 & 12. Prepare to discuss Exercise D: Bayer.	
	Fri. Mar. 14	Individual Executive Summary	Hand in Individual Executive Summary.	Pandora Exec. Sum.
	Mon. Mar. 17 Tue. Mar. 18	Strategic Entrepreneurship. The Future.	Read Ch. 13 & <i>How to plan like a Futurist</i> . Prepare to discuss Exercise E: Futures. *	
	Fri. Mar. 21	Group Case Synopsis	Group Case Synopsis.	Group Synopsis
Ends: Mon. Class	Mon. Mar. 24	Case Presentations	Case Presentations	
	Wed. Mar. 26	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Mon. Mar. 31	Case Presentations	Case Presentations	
	Wed. Apr. 02	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Mon. Apr. 07	Case Presentations	Case Presentations	
Ends: Tue. Class	Wed. Apr. 09	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Mar. 25	Case Presentations	Case Presentations	
	Thurs. Mar. 27	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Apr. 01	Case Presentations	Case Presentations	
	Thurs. Apr. 03	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Apr. 08	Case Presentations	Case Presentations	
	Thurs. Apr. 10	Group Executive Summary	Group Executive Summary	Group Exec. Sum.

* This can be found at <https://hbr.org/2019/07/how-to-do-strategic-planning-like-a-futurist>



COURSE: BUS 478-3

INSTRUCTOR: Dr. J. Sheppard

E-mail: sheppard@sfu.ca

Title	Name	Last 4 Digits of Student ID #	Concentration
<i>Chief Executive Officer</i>			
<i>Chief Operations Officer</i>			
<i>Chief Marketing Officer</i>			
<i>Chief Financial Officer</i>			
<i>Chief of Human Resources</i> <i><u>If you have one</u></i>			
<i>Chief Information Officer</i> <i><u>If you have one</u></i>			

<i>First Choice</i>	March 24	March 31	April 07
<i>Second Choice</i>	March 24	March 31	April 07
<i>Third Choice</i>	March 24	March 31	April 07

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Formulation Analysis Evaluation

<i>Section of report</i> <i>Range is 0.0 –4.4</i>	Form	Content
Mission, Objectives, Goals, stakeholders	<ul style="list-style-type: none"> ◆ Updated Information ◆ Current Mission ◆ Goals & Objectives ◆ Stakeholders 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆ Macro Environment (Demographics, Economy, etc.) ◆ Industry Environment (Porter's 5) ◆ Competitors (top 3 or so) ◆ What are the industry dynamics 	<ul style="list-style-type: none"> • Clearly outline these elements. • Industry dynamics include the likelihood of competitor attack and response and the form these attacks and responses are likely to take given conditions in the environment
Resources and Capabilities / Core Competencies	<ul style="list-style-type: none"> ◆ Resources (Tangible / Intangible) ◆ Capabilities (by Functional Area) ◆ Core Competencies (VIRO) ◆ Performance 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆ Business Level Strategy ◆ Corporate Level Strategy ◆ International Strategy ◆ Cooperative Strategy 	<ul style="list-style-type: none"> • Tell me what is their: <ul style="list-style-type: none"> - 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

<i>Section of report</i> <i>Range is 0.0 –4.4</i>	Form	Content
Synthesis	<ul style="list-style-type: none"> ◆ Firm Strengths & Weaknesses ◆ Enviro. Opportunities & Threats ◆ SWOT Matrix ◆ Does the strategy fit the SWOT 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆ Criteria by which you will evaluate a good recommendation. ◆ Recommendation. ◆ Targets and Goals ◆ Evaluation of Recommendations. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆ 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. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆ Cover ◆ References ◆ Figures (like organization charts or time lines) ◆ Tables. 	<ul style="list-style-type: none"> • 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

<i>Section of report</i> <i>Range is 0.0 –4.4</i>	Form	Content
Introduction	<ul style="list-style-type: none"> ◆ Format allows quick access to info. ◆ Compelling statement of interest. ◆ Analysis goals and objectives. ◆ Recommended strategy. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> ◆◆ Opportunities & threats (competitor, industry and macro environment). ◆◆ Strengths & limitations (resources, capabilities & core competencies). 	<p>Clearly discuss these elements:</p> <ul style="list-style-type: none"> •• Opportunities & threats (competitor, industry and macro environment). •• Strengths & limitations (resources, capabilities & core competencies).
The Solution	<ul style="list-style-type: none"> ◆ Obvious & clear action statements. ◆ Clear outline of action steps. ◆ Clear timeline. ◆ Clearly stated goals. 	<ul style="list-style-type: none"> • What do you want 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	<ul style="list-style-type: none"> ◆◆ External circumstances driving change. ◆ Internal resources for recommendation. ◆ Compelling statement of urgency. 	<p>Explain:</p> <ul style="list-style-type: none"> •• 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 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 <u>overview</u> .)			
2. Show an <u>analysis</u> backing how you arrived at your conclusion of what the organizational challenges are (Mainly an <u>external analysis</u> .)			
3. Tell me what <u>resources & capabilities</u> the organization has that help address the challenges / problems for the organization.			
4. Tell me what <u>restraints</u> the organization has to limit its actions.			
5. Sum-up the above by telling what a good recommendation does. (<u>Criteria for good recommendation</u> .)			
6. Make a <u>recommendation</u> that is clear and achievable.			
7. Explain an <u>implementation</u> showing a sense of urgency.			
8. Show me what things will look like when you are done. (i.e. how you <u>measure success</u>).			
9. Address the <u>questions</u> 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.

Name _____
Student # _____

Bus 478 Group Evaluation

Group _____

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

Strategic Management: Competitiveness & Globalization

Introductory Slides:

Business 478: Strategy Course & Delivery

PART 0 Help with Strategy

Learning Objectives

Studying this material should provide you with the strategic management knowledge needed to:

1. Know how to pass this class.
2. Know how to find the resources to perform an acceptable strategic analysis in this class.
3. Know that you could maybe not possibly ask for more!

Word cloud terms: Student, Learning, Outcomes, Assessment, Evaluation, Quality, Goals, Performance, Data, Affairs, Learning, Outcomes, student-centered, effectiveness, students, quality, also, learning, data, programs, performance, student, goals, assessment, evaluation, quality, also, learning, data, affairs, learning, outcomes, student-centered, effectiveness, students.

Intro. to Bus. 478: Strategy / ~25 D400/S00 Mon. Spring(1251)

Prerequisites: Bus. 207, 312, 343, 360 & 374 or 381 & 90 credits.

INSTRUCTOR: Jerry Sheppard

CONTACTS: 778-782-4918 ✉ Sheppard@sfu.ca

OFFICE: WMC 4387

HOURS: Mon. 12:45-2:20, Tue. 1:40-2:20 & by Appt.
For an appointment contact me in person, by phone or E-mail & we'll set-up an appt.

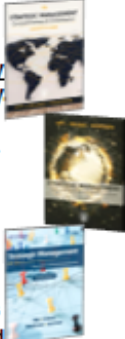
Canvas includes cases & exercises.

Course Description & Text

Course Description:
Provide an introduction to Strategy.

- Goal: enhance your ability to **insightfully** develop, articulate, implement a strategy
- Coverage: strategic mgmt. process:
 - i.e., strategy formulation and implementation.
- Short lectures, case studies and classroom exercises will support lecture & discussion of course topics.

Text:
Hitt, Ireland, & Hoskisson
 Strategic Management: Competitiveness & Globalization, Concepts, 12th or later Ed



Presented Info. Videos 1011 Course Description 1012 Grading & Evaluation 1013 Case Studies 1014 Assignments 1015 Strategies 1016 Group Process 1017 Self-Reflection & Study

Grading (more on this when I get to grade sheets)



Individual Grade (72%)

Written Component

- 16% Formulation Analysis.
- 16% Integrate, Recommend, and Implement.
- 16% Executive Summary.

Participation Component

- 11% Individual Participation.
- 7% Presentation Performance.
- 6% Peer Evaluated Group Contribution.


is the individual written case

Presented Info. Videos 1011 Course Description 1012 Grading & Evaluation 1013 Case Studies 1014 Assignments 1015 Strategies 1016 Group Process 1017 Self-Reflection & Study

Grading (more on this when I get to grade sheets)

Group Grade (28%)

- Final Group Case
 - 8% Written Case Synopsis
 - 10% Case Presentation
 - 10% Written Executive Summary



These folks look WAY too happy!

GPA ~ % Conversion

GPA Grade = [% Grade / 25]
 % Grade = [GPA scale * 25]

CONVERSION


Ethical - Not doing your own work on individual assignments
 plagiarism or insufficient citation may get you a zero
 - You'll need to mention AI use in your notes.

Presented Info. Videos 1011 Course Description 1012 Grading & Evaluation 1013 Case Studies 1014 Assignments 1015 Strategies 1016 Group Process 1017 Self-Reflection & Study

Group Selection Form

Name	Student ID #	Title	Concentration
Steve Jobs	20311-1234	CEO	Marketing
Andy Grove	20302-1415	COO	Mgmt. Science
Phillip Kives	20210-1234	CMO	Marketing
Mike Milkin	20311-5678	CFO	Finance
Mark Wexler	20102-1234	CHR	H.R.M.

You need to find a group in a company to analyze by Jan. 17. I'll put you in a group if you can't find one.

Audio | Info | Slides | 7:15 | Course Introduction | Text & Course Description | Studies & Reading | Case Analysis | Class Assignments | Strategic Analysis | Group Presentation | Self-Reflection & Study

Class Assignments: The Basics

Date	Topic	Class Details	Readings
Mon. Jan. 06	Strategic Mgmt.	Strategic Mgmt. & Cases	Ch. 1, Case Pwr. Pts
Mon. Jan. 13	Ex- & Internal Enviro	Enviro. & the IMI Case	Ch. 2 & 3 & The IMI Case
Fri. Jan. 17	GROUP LISTS DUE		
Mon. Jan. 20	Business & Corp. Level Strategies	Bus. & Corp. Level Strat.s & Exercises A & B	Chapters 4 and 6 & Exercises A & B
Mon. Jan. 27	Competitive Rivalry & Dynamics	at Home	Ch. 5 & Format Pwr. Pts
Mon. Feb. 03	International Strategy	International Strat. & Toms	Ch. 8 & The Toms Case
Mon. Feb. 10	Cooperative Strategy	Cooperative Strat. & The Carlsberg Case & Slides	Chapter 9 & the Carlsberg Case & Slides
Fri. Feb. 14	Individual Formulation Analysis Due on Pandora		
Mon. Feb. 17	FAMILY WEEK		
Mon. Feb. 24	Organizational Structure & Control	Structure and Control & The Deepwater Horizon	Chapter 11 & The Deepwater Horizon Case

Audio | Info | Slides | 8:15 | Course Introduction | Text & Course Description | Studies & Reading | Case Analysis | Class Assignments | Strategic Analysis | Group Presentation | Self-Reflection & Study


Class Assignments: Applications & Ends

Date	Topic	Class Details	Readings
Mon. Mar. 03	Restructuring	Restructuring & Exercise C	Chapter 7 & Exercise C
Fri. Mar. 09	Individual Integration Recommendation and Implementation Analysis on Pandora		
Mon. Mar. 10	Corp. Governance Leadership	Corp. Governance, Leadership & Exercise D	Chapters 10 & 12 & Exercise D
Fri. Mar. 14	Individual Executive Summary Due on Pandora		
Mon. Mar. 17	Strat. Entrepreneurship & the Future	Strategic Entrepreneurship, the Future & Exercise E	Ch. 13, Being a futurist & Exercise E
Fri. Mar. 21	Group Case Synopsis Due		
Mon. Mar. 24	Case Presentations (Group Exco. Sum. due Mar. 28)		
Mon. Mar. 31	Case Presentations (Group Exco. Sum. due Apr. 02)		
Mon. Apr. 07	Case Presentations (Group Exco. Sum. due Apr. 06)		

Audio | Info | Slides | 8:15 | Course Introduction | Text & Course Description | Studies & Reading | Case Analysis | Class Assignments | Strategic Analysis | Group Presentation | Self-Reflection & Study

Grade for Formulation Analysis ★

Section of report <small>Grade range is 0.0 – 4.3</small>	Form	Content	SUBHEADINGS!
Mission, Objectives, Goals, Stakeholders	3.0	3.3	Include Corp. Philosophy and stakeholder analysis.
General & Industry Environment	3.0	3.4	General External Environment, Porter's 5 Forces, Competitor Analysis & Dynamics.
Resources, Capabilities & Core Competencies	3.3	3.3	Subheadings. Including explaining the firm's core competences (VRIO).
Bus., Corp., Co-op. & International Strategies	3.3	3.4	Subheadings include Business, Corp., International & Co-op. Strategies.
Average		3.25	Average




Downloaded from: 11/03 > Course Introduction > Test & Course Description > Grades & Grading > Group Selection > Class Assignments > **Strategic Analysis** > Group Peer Evaluation > Self Evaluation & Summary >

Grade for Integration, Rec. & Impl. ★

Section of report <small>Grade range is 0.0 – 4.3</small>	Form	Content	SUBHEADINGS!
SWOT & Synthesis	3.5	3.3	SWOT & how Strengths match Opportunities & how Weaknesses exacerbate Threats.
Criteria, recommend target, evaluate,	3.5	3.5	Create criteria for a recommendation, recommend, set targets, evaluate.
Implementation	3.3	3.4	State an action plan, timeline, needed structural & control changes required.
Remaining Considerations	3.5	3.4	Cover, reference, figures, tables.
Average		3.35	Average

Equal Weighting & pretty much as described.




Downloaded from: 11/03 > Course Introduction > Test & Course Description > Grades & Grading > Group Selection > Class Assignments > **Strategic Analysis** > Group Peer Evaluation > Self Evaluation & Summary >

Grade for Executive Summary ★

<https://www.inc.com/guides/201008/how-to-write-an-executive-summary.html>

➤ **First Paragraph Introduction:**

- ❖ If asked to read a big paper, you'd want to know why.
- ❖ Explains what a firm does & compels further reading.
 - If you've a compelling A-Ha! moment, or identified a market segment not adequately served, you might start there.
 - Think about your core strengths.
 - Use bullet points to present your ideas more concisely.
 - What attributes does your firm have that make it special?



Downloaded from: 11/03 > Course Introduction > Test & Course Description > Grades & Grading > Group Selection > Class Assignments > **Strategic Analysis** > Group Peer Evaluation > Self Evaluation & Summary >

Strategic Management:
Competitiveness & Globalization

Essential Case Slides 1/21

Case Slides:

Strategy Case Analysis / Preparing an Effective Case Analysis

PART 0 Help with Strategy

Strategic Management:
Competitiveness & Globalization

Essential Case Slides 2/21

Learning Objectives

Studying this material should provide you with the strategic management knowledge needed to:

- Study the product of the analysis: the report. 3.
- Discuss, generally, what's involved with the synopsis. 4.
- Note the requirements for the analysis paper. 5.
- Note the analysis presentation requirements. 6.

Case Studies

Strategic Management:
Competitiveness & Globalization

Essential Case Slides 3/21

The Strategic Management Process

Analysis

Implementation for Performance


Strategies

Essentials in Preparing a Case

- + Cases force you to confront reality:
 - The absence of needed information;
 - An imbalance among needs & resources;
 - Conflicts among competing objectives.
- + Cases require you to:
 - Relate analysis and action.
 - Develop realistic and concrete actions, despite complexity & partial knowledge.
- + The primary responsibility for learning is yours.
 - The quality of discussion entails some mastery of case facts & some analysis.
 - Read & think carefully about each case.

Essential Case Slides 4/21


Essentials of Preparing a Case
Preparing for a Case
Producing a Good Case Analysis
Producing Good Analysis Papers
Producing a Good Firm Synopsis
Other Useful
Producing a Good Presentation




Essentials in Preparing a Case


Essential elements include preparation:

- Careful reading and thinking about case facts,
- Reasoned analyses,
- Development of alternative solutions to case problems.






Recommended alternatives should flow logically from core problems identified through study of the case.




Essential Case Slides 5/21


Essentials of Preparing a Case
Preparing for a Case
Producing a Good Case Analysis
Producing Good Analysis Papers
Producing a Good Firm Synopsis
Other Useful
Producing a Good Presentation



Preparing for a Case


1. Gaining Familiarity
 - In general, determine who, what, how, where & when (the critical facts in a case).
 - I.D. situation's places, persons, activities, & contexts.
 - Recognize informational certainties & uncertainties.
2. Recognizing Symptoms
 - List all indicators (including stated "problems") that something is not as expected or as desired.
 - Ensure symptoms are not assumed to be a problem (symptoms lead to identifying problems):
 - You may want to correct symptoms, not true problems.
 - True problems are states or situations requiring solution before firms' or persons' performance can improve.




 PLANNING & PREPARATION
 PREVENTS
 POOR PERFORMANCE

Essential Case Slides 6/21


Essentials of Preparing a Case
Preparing for a Case
Producing a Good Case Analysis
Producing Good Analysis Papers
Producing a Good Firm Synopsis
Other Useful
Producing a Good Presentation



Preparing for a Case



3. Identifying Goals

- Identify critical statements by major parties.
- List all goals of the major parties that exist or can be reasonably inferred.

 PLANNING & PREPARATION
PRESENT
PISS POOR PERFORMANCE

4. Conducting the Analysis

- Decide what ideas, models, theories are useful.
- Apply these conceptual tools to the situation.
- As new info. is revealed, go recycle back to 'a.'

Essential Case Slides 7/21
Essentials of Preparing a Case
Preparing for a Case
Producing a Good Case Analysis
Producing Good Analysis Papers
Producing a Good Firm Synopsis
Other Useful
Producing a Good Presentation
Help

Preparing for a Case

5. Making the Diagnosis

- Identify predicaments (goal inconsistencies).
- Identify problems (goal performance divergence).
- Prioritize problems by timing, importance, etc.

6. Doing the Action Planning

- Specify & prioritize criteria used for alternatives.
- Discover or invent feasible action alternatives.
- Examine likely consequences of alternatives.
- Recommend a course of action.
- Design an implementation plan / schedule.
- Create a plan to assess implemented actions.

Essential Case Slides 8/21
Essentials of Preparing a Case
Preparing for a Case
Producing a Good Case Analysis
Producing Good Analysis Papers
Producing a Good Firm Synopsis
Other Useful
Producing a Good Presentation
Help


Producing a Good Case Analysis

1. Mission, Objective, Goals & Stakeholders

FORM

- Updated Information
- Current Mission / Goals & Objectives
- Stakeholders & what they want

- If the case info. needs updating, you should update it & bring the audience up to speed.
- Provide what you think are the firm's current Mission & some goals.
- Provide a list of stakeholders & what you think they each desire from the firm.




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Help

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2. External Environment: General, Industry & Competitive


FORM



- **General (Macro) Environment:**
Demographics, Economy, etc.
- **Industry Environment:**
Porter's 5 forces.
- **Competitors:**
Detail the top three.
- **Dynamics:**
Likelihood of attack & response.

• Clearly detail the above elements.

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3. Internal Analysis:


Resources, Capabilities, Core Competencies

FORM

- **Resources**
Tangible Intangible
- **Capabilities (by Functional Area).**
- **Core Competencies (VRIO).**
- **Financial Performance results.**

• Details will be needed.
(You might say "Their physical plant is the most modern and efficient in the industry. It allows them to..." rather than just listing 'Physical Plant' under tangible resources).

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4. Strategy

FORM

- **Business Level Strategy.**
- **Corporate Level Strategy.**
- **International Strategy.**
- **Cooperative Strategy.**

- **State the firm's Generic Bus. level strategy**
(Cost Leadership, Differentiation, Focus)
- **State the firm's Corp. level strategy**
(Conglomerate, Vert. Integration, Single bus.)
- **State the firm's International Strategy**
(Global, Transnational, Multidomestic)
- **Say with whom they have cooperative arrangements & how they benefit the firm.**

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5. SWOT & Synthesis

FORM

CONTENT

SWOT Synthesis (with SWOT Matrix)

	Strengths	Weaknesses
Opportunities	What strengths allow the firm to uniquely take advantage of opportunities	What weaknesses prevent the firm from taking advantage of opportunities
Threats	What strengths allow the firm to defend against threats.	What weaknesses exacerbate threats to the firm.

How does all that you have said so far fit together.

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6. Criteria, Evaluations & Recommendations

FORM

CONTENT

- Criteria for Evaluation of Recommendation.
- Recommendation.
- Targets and Goals.
- Evaluation of Recommendation.

- What are the criteria for a good recommendation.
- Recommend a course of action.
- Tell me what you seek to achieve through your recommendations.
- Evaluate your recommendation based on the criteria.

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7. Implementation

FORM

CONTENT

- Plan of Action (What to do 1st, 2nd, etc.)?
- Are new Organizational Structures & Controls needed (If so, What types?).
- Criteria by which we Evaluate Changes.

- Generate a list actions needed for change and explain your logic for them.
- Evaluate whether new Organizational Controls are needed & if so what types.
- Discuss how we will know whether the change has been effective.

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Writing Good Formulation & Integration- Recommendation-&-Implementation Analyses

The Individual Analyses:

- **Formatting:**
 - One and 1/2 spaced (I will check).
 - Page limit is eight pages, excluding cover and citations.
 - NO Table of Contents needed. NO Appendices allowed!
 - Min. 12 point Times New Roman with max. .3 compression.
 - Minimum margins of 1 inch or 2.54 centimeters.
- **Tables:**
 - They save space (avoid cut & paste).
 - Short term memory rule: 7 ± 2 for lists
- **Citations / References:**
 - Any common consistent format; quotes, odd facts, outside sources.
 - Include notes on any use of AI.
- **Grammar: No incompressible misspelled sentences.**

the course outline says what individual analyses are & when they are due!

Canvas has a blank analyses with very useful advice.

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For a Good Executive Summary

- **INTRODUCTION**
 - Explain what the firm does.
 - Give a compelling interest to read.
 - Does it note goals of the analysis?
 - Include a recommended strategy.
- **THE PROBLEM / CHALLENGE**
 - Opportunities & threats (competitor, industry and macro environment).
 - Strengths & limitations (resources, capabilities & core competencies).
- **THE SOLUTION**
 - What do you want the firm to do?
 - What steps need to be taken (logical & appropriate action plan).
 - How soon do we start; with what steps?
 - How will we measure success (criteria by which you evaluate).
- **WHY NOW**
 - Explain external circumstances driving change.
 - Note internal resources for recommendation.
 - Detail the need for why change now.

One page, 11 pt., New Times Roman, 1/2-inch margins, 1.25 spacing

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For a Good Company Synopsis

Groups will write a 5-8 page company synopsis.

- This is a mini-case to familiarize the rest of the class with the firm your group will analyze.
 - It will be posted on-line for everyone in class to read.
- Your synopsis should cover:
 - Firm history.
 - Current situation.
 - Environment.
 - Main strategic challenges.
- I will need a Word™ AND a pdf version of your groups' synopsis e-mailed to me in good form.
 - Without student ID numbers on the cover.
- There is a link to previous terms synopses on Canvas under "Miscellaneous useful items, links & files."

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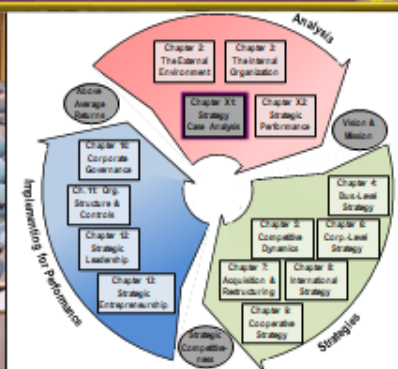
- A presentation should include all parts of an exec. summary.

- Evidence all analysis parts were done.
- Presentations should be about 30 minutes, & 10 min.s for ?s.
- You all present, but it's a group grade.
- Consistent written look so it seems like the group coordinated what's shown.
 - This means the same typeface, same system of typeface sizes & bullets, etc.
 - Minimum 18 point type.
 - Spelling & Grammar count.

- The Word™ Exec. Summary is due two days after presenting.

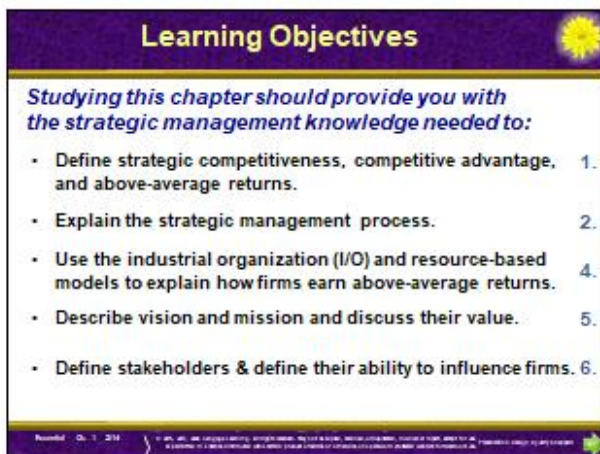
Section of report Grade level: 1-3	Grade	Form	Content
Introduction			
The Problem			
The Solution			
Why now?			
Average			

Section of report Grade level: 4-5	Content	Section of report Grade level: 4-5	Content
Mission, Objectives, Goals, Stakeholders	✓	SWOT & Synthesis	✓
General & Industry Environment	✓	Criteria, Resources, & Targets & Evaluation	✓
Resources, Capabilities & Cost Comparison	✓	Implementation	✓
Info, Equip., Group & Control-related Strategies	✓	Revisiting Cost Allocation	✓

[illegible]

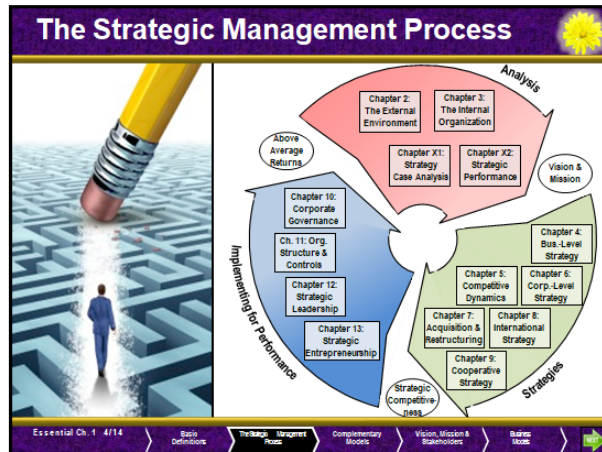


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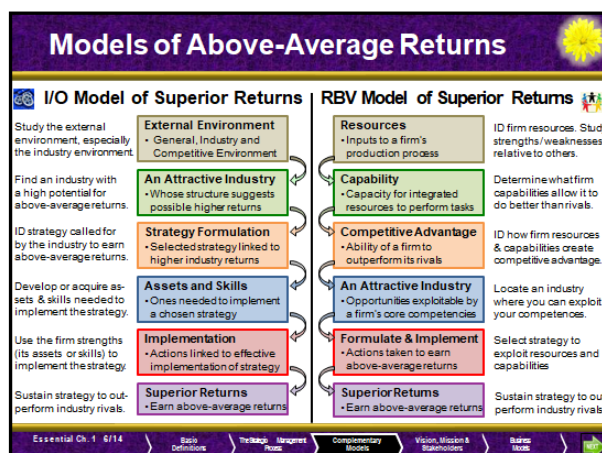


2









The I/O Model & Its Assumptions

1. The external environment imposes pressures and constraints that determine strategic choices.
2. Similarity in strategically relevant resources causes competitors to pursue similar strategies.
3. Resource differences among competitors are short-lived due to resource mobility across firms.
4. Strategic decision makers behave as rational profit optimizers.

Thus the I/O model is very reliant on the Porter five forces model

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Five Forces Model & Its Assumptions

- Industry profitability (rate of return on invested capital relative to cost of capital) is a function of interactions among the 5 forces.
- Industry attractiveness equates to its profitability potential for earning above-average returns to:
 - Produce standard goods or services at costs below rivals (cost leaders).
 - Or produce differentiated goods or services for which customers are willing to pay a price premium (differentiation).

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The RBV Model & Its Assumptions

RBV Model of Above Average Returns

Resources As Core Competencies

1. Firms acquire different sets of resources.
2. Unique capabilities are based on how firms combine resources.
3. Resources and certain capabilities are not highly mobile across firms.
4. Differences in resources/capabilities are basis of competitive advantage and firm performance, not the industry's structural characteristics.

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Vision Statement

- **A Successful Vision is:**
 - An enduring word picture of what the firm wants to be and expects to achieve in the future.
 - One that stretches and challenges the firm's people.
 - One that reflects the firm's values and aspirations.
 - Most effective when its development includes all stakeholders.
 - One which recognizes the firm's internal organizational and external competitive environments.
 - Supported by upper management decisions and actions.



"Our vision is to be the quality leader in everything we do."

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Mission Statement

- **An Effective Mission:**
 - Specifies business or businesses in which the firm intends to compete & customers it intends to serve.
 - Has a more concrete, near-term focus on current product markets and customers than the firm's vision.
 - Should be inspiring and relevant to all stakeholders.



"Our guiding mission is to deliver superior quality products & services for our customers & communities through leadership, innovation & partnerships."

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Stakeholders

Primary stakeholders
 (individuals, groups, and organizations)

- Can affect development of the firm's vision and mission
- Are affected by the strategic outcomes achieved by the firm
- Can have enforceable claims on the firm's performance
- Are influential when in control of critical or valued resources

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