

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.

Schedule

	Class	Topic Detail	Tasks	Hand in
Formulation & Integration	Mon. Jan. 06	Intro. to Strat. Management.	Read Chapter 1.	
	Tue. Jan. 07	Strategy Case Analysis.	Look over the Case PowerPoint Slides.	
	Mon. Jan. 13	External & Internal Environment.	Read Chapters 2 and 3.	
	Tue. Jan. 14		Prepare to discuss The IMI Case.	
	Fri. Jan. 17	Group lists.	Hand in Group lists.	Group Lists
	Mon. Jan. 20	Business Level Strategy.	Read Chapters 4 and 6.	
	Tue. Jan. 21	Corporate Level Strategy	Prepare to discuss Exercises A & B: the RV Ind.	
	Mon. Jan. 27	At home material	Read Chapter 5 & Execute Audio Chapter 5	
	Tue. Jan. 28	Competitive Rivalry & Dynamics.	Power-point & Watch Online Word Lecture	No In-person Class
Implementation	Mon. Feb. 03	Competitive Rivalry & Dynamics & International Strategy.	Read Chapter 8	
	Tue. Feb. 04		Prepare to discuss The Tom's Case.	
	Mon. Feb. 10	Cooperative Strategy.	Read Ch.9 / Prepare to discuss the Carlsberg Case & critique of the Carlsberg slides.	
	Tue. Feb. 11			
	Fri. Feb. 14	Formulation Analysis.	Hand in Individual Formulation Analysis.	Formulation analysis for Pandora
	Mon. Feb. 17	Family Week		No Class
	Tue. Feb. 18			
	Mon. Feb. 24	Organization Structure and Controls.	Read Chapter 11.	
	Tue. Feb. 25		Prepare to review Deepwater Horizon.	
Ends: Mon. Class	Mon. Mar. 01	Restructuring.	Read Chapter 7.	
	Tue. Mar 02		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	Corporate Governance & Leadership	Read Chapters 10 & 12.	
	Tue. Mar.11		Prepare to discuss Exercise D: Bayer.	
	Fri. Mar. 14	Individual Executive Summary	Hand in Individual Executive Summary.	Pandora Exec. Sum.
	Mon. Mar. 17	Strategic Entrepreneurship. The Future.	Read Ch.13 & <i>How to plan like a Futurist.</i>	
	Tue. Mar. 18		Prepare to discuss Exercise E: Futures. *	
	Fri. Mar. 21	Group Case Synopsis	Group Case Synopsis.	Group Synopsis
Ends: Tue. 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	
	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>

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.



BEEDIE SCHOOL OF BUSINESS SIMON FRASER UNIVERSITY

Bus 478 Group Selection

COURSE: BUS 478-3

TITLE: Strategy

INSTRUCTOR: Dr. J. Sheppard

Office: WMX 4387

E-mail: sheppard@sfu.ca

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

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> <u>If you have one</u>			
<i>Chief Information Officer</i> <u>If you have one</u>			

Preferences

<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

Comments

Formulation Analysis Evaluation

Section of report Range is 0.0 – 4.4	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

Section of report Range is 0.0 – 4.4	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

Section of report Range is 0.0 – 4.4	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 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	<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.

STUDENT INPUT FOR CLASS PARTICIPATION GRADE (Due last Class)

Name _____
Student # _____

General attendance A+ A A- B+ B B- C+ C C- D F
(Missed Classes) ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ Comments: _____

On-time attendance A+ A A- B+ B B- C+ C C- D F
(Late Classes) ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ Comments: _____

Minutes of Sleep or work A+ A A- B+ B B- C+ C C- D F
on other class classwork ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩ Comments: _____

Contribution Quantity A+ A A- B+ B B- C+ C C- D F
⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ① ① Comments: _____

Contribution Quality A+ A A- B+ B B- C+ C C- D F
⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ① ① Comments: _____

Other (Specify) A+ A A- B+ B B- C+ C C- D F
⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ① ① Comments: _____

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>	12.4	15.5	18.6		

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!

Student Learning Outcomes

programs performance student goals
Assessment evaluation
data Affairs Learning assessment
learning services quality
improvement learning outcomes
facilities organization effectiveness
improvement learning outcomes
student-centered students

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.

A slide titled 'Course Description & Text' featuring a yellow sun-like graphic in the top right corner. The main text is 'Course Description: Provide an introduction to Strategy.' Below this is a bulleted list of course goals and coverage. To the right are three images of strategy-related books: 'Strategic Management' by Michael H. Porter and Robert H. Fray, 'Strategic Management: Competitiveness & Globalization' by Michael E. Porter and Daniel C. Heene, and 'Strategic Management: Theory and Practice' by Michael H. Porter and Robert H. Fray.

<h1>Grading (more on this when I get to grade sheets)</h1>	
	
<h2><u>Individual Grade (72%)</u></h2>	<p>is the individual written case</p>
<h3>Written Component</h3> <ul style="list-style-type: none"> 16% Formulation Analysis. 16% Integrate, Recommend, and Implement. 16% Executive Summary. 	
<h3>Participation Component</h3> <ul style="list-style-type: none"> 11% Individual Participation. 7% Presentation Performance. 6% Peer Evaluated Group Contribution. 	

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

GPA ~ % Conversion

GPA Grade = [% Grade / 25]

% Grade = [GPA scale * 25]

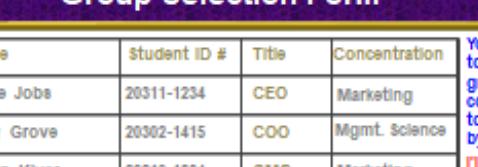
Ethical - Not doing your own work on individual assignments
plagiarism or insufficient citation may get you a zero
- You'll need to mention AI use in your notes.

CONVERSION

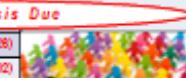


Name	student ID #	Title	Concentration
Steve Jobs	20311-1234	CEO	Marketing
Andy Grove	20302-1415	COO	Mgmt. Science
Phillip Klives	20210-1234	CMO	Marketing
Mike Millkin	20311-5678	CFO	Finance
Mark Wexler	20102-1234	CHR	H.R.M.

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.



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 IM Case	Ch. 2 & 3 & The IM Case
Fri. Jan. 17	GROUP LISTS DUE		
Mon. Jan. 20	Business & Corp. Level Strategies	Bus. & Corp. Level Strats & 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 Strat.	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		No Class
Mon. Feb. 24	Organizational Structure & Control	Structure and Control & The Deepwater Horizon	Chapter 11 & The Deepwater Horizon Case
Auth. Interv. Slides	W/ 18	Case	Introduction
		Team & Cases	Team & Cases
		Divisions & Functions	Divisions & Functions
		Group Assignment	Group Assignment
		Strategic Perspectives	Strategic Perspectives
		Group Project & Results	Group Project & Results

Class Assignments: Applications & Ends				
Date	Topic	Class Details	Readings	
Mon. Mar. 03	Restructuring	Restructuring & Exercise C	Chapter 7 & Exercise C	
Fri. Mar. 09		<i>Individual Integration Recommendation and Implementation Analysis on Pandora</i>		
Mon. Mar. 10	Corp. Governance Leadership	Corp. Governance, Leadership & Exercise D	Chapters 10 & 12 & Exercise D	
Fri. Mar. 14		<i>Individual Executive Summary Due on Pandora</i>		
Mon. Mar. 17	Strat. Entrepreneur & the Future	Strategic Entrepreneurship, the Future & Exercise E	Ch. 13, Being a futurist & Exercise E	
Fri. Mar. 21		<i>Group Case Synopsis Due</i>		
Mon. Mar. 24	<i>Case Presentations (Group Exeo. Sum. due Mar. 26)</i>			
Mon. Mar. 31	<i>Case Presentations (Group Exeo. Sum. due Apr. 02)</i>			
Mon. Apr. 07	<i>Case Presentations (Group Exeo. Sum. due Apr. 06)</i>			
Finals	Finals	Finals	Finals	

Grade for Formulation Analysis

Section of report Grade range is 0.0 – 4.3	Form	Content
Mission, Objectives, Goals, Stakeholders	3.0	3.3
General & Industry Environment	3.0	3.4
Resources, Capabilities & Core Competencies	3.3	3.3
Bus., Corp., Co-op. & International Strategies	3.3	3.4
Average		3.25

SUBHEADINGS!

- Include Corp. Philosophy and stakeholder analysis.
- General External Environment, Porter's 5 Forces, Competitor Analysis & Dynamics.
- Subheadings. Including explaining the firm's core competences (VRIO).
- Subheadings include Business, Corp., International & Co-op. Strategies.

Average



Essential Intro. Stages 1020 > Course Introduction > Test & Course Description > Grade & Grading > Group Selection > Class Assignments > Strategic Analysis > Group Peer Evaluation > Self Evaluation & Roster > 

Grade for Integration, Rec. & Impl.

Section of report Grade range is 0.0 – 4.3	Form	Content
SWOT & Synthesis	3.5	3.3
Criteria, recommend target, evaluate,	3.5	3.5
Implementation	3.3	3.4
Remaining Considerations	3.5	3.4
Average		3.35

SUBHEADINGS!

- SWOT & how Strengths match Opportunities & how Weaknesses exacerbate Threats.
- Create criteria for a recommendation, recommend, set targets, evaluate.
- State an action plan, timeline, needed structural & control changes required.
- Cover, reference, figures, tables.

Average



Equal Weighting & pretty much as described.

Essential Intro. Stages 1120 > Course Introduction > Test & Course Description > Grade & Grading > Group Selection > Class Assignments > Strategic Analysis > Group Peer Evaluation > Self Evaluation & Roster > 

Grade for Executive Summary

<https://www.inc.com/guides/201003/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?



Essential Intro. Stages 1220 > Course Introduction > Test & Course Description > Grade & Grading > Group Selection > Class Assignments > Strategic Analysis > Group Peer Evaluation > Self Evaluation & Roster > 

Grade for Executive Summary

Then tell me: • The Problem • Your Solution • Why Now

- Problems include threats, opportunities &/or limitations.
- Solutions should address what you want to do & when.
- Why Now is important since it makes a summary timely.
 - Do NOT leave a reader thinking there's plenty of time to act.
 - If there's no urgency to a summary, the plans won't get read.

EXECUTIVE SUMMARY versus INTRODUCTION			
Executive summary provides a condensed version of the main document	Introduction introduces the document and explains what the document is about	Contains all important elements of the main text including the introduction, recommendations and conclusions	May contain background information, theory, statement of control problems, definition of terms and structure of the text
One can understand the goal of a text by reading the executive summary	One cannot understand the content of a text by merely reading the introduction	Can be read as separate documents	Cannot be read as separate documents

Recorded Info. Video 10:11 > Course Introduction > Text & Content Description > Reading & Coding > Story Structure > Discourse Analysis > Multiple Perspectives > Self Production > A Study >

Group Peer Evaluations

Group Name: _____

Peer Evaluation

Grade range is 0.0 - 4.3.	Fill in only the column that applies to your group	
Title	4 Person Group	Comments
CEO:	3.7	OK
COO:	3.5	So-So
CMO:	3.8	Good!
CFO:	1.4	zzzzzz
CHR:		
Total:	12.4	

Don't be the free rider! You get a higher grade by not filling this out!
This is due Apr. 10, 2025

Recorded Info. Video 10:11 > Course Introduction > Text & Content Description > Reading & Coding > Story Structure > Discourse Analysis > Multiple Perspectives > Self Production > A Study >

Sundry Material

- Sessions average 33% short lecture, 67% strategy exercise or case analysis.
- On-line lectures are from concepts chapters.
- Power Point Audio Lectures are available at: Canvas & <http://www.sfu.ca/~sheppard/478index.html>
- All powerpoint presentations include:


A rose means Uber-Text notes


A star means an important point



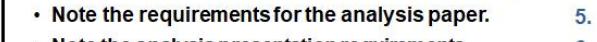
There's also some material on the bottom of the slide so you know how much longer the prof. is going to ramble on.

Recorded Info. Video 10:11 > Course Introduction > Text & Content Description > Reading & Coding > Story Structure > Discourse Analysis > Multiple Perspectives > Self Production > A Study >

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



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Presentation design by Jerry Shapiro

The Strategic Management Process

The diagram illustrates the Strategic Management Process as a cyclical flow:

- Analysis:** Chapters 2 (The External Environment) and 3 (The Internal Organization).
- Strategy Case Analysis:** Chapter XI (Strategic Case Analysis).
- Implementing for Performance:** Chapters 10 (Corporate Governance), Ch. 11 (Org. Structure & Controls), Chapter 12 (Strategic Leadership), Chapter 13 (Strategic Entrepreneurship), Chapter 7 (Acquisition & Restructuring), Chapter 8 (International Strategy), Chapter 9 (Cooperative Strategy), and Chapter 4 (Bus. Level Strategy).
- Strategic Competitiveness:** Chapter 5 (Competitive Dynamics).
- Strategies:** Chapter 6 (Corp. Level Strategy).

Key concepts like **Above Average Returns** and **Vision & Mission** are also highlighted.

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.

Essentials in Preparing a Case

Preparing for a Case

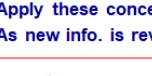
Preparing for a Case

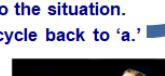
3. Identifying Goals

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

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.'







PLANNING &
PREPARATION

PISS POOR,
PERFORMANCE

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.



PLANNING &
PREPARATION
PRESENT
PISS POOR
PERFORMANCE



action
planning

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.

CONTENT

Producing a Good Case Analysis

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.

CONTENT

- Clearly detail the above elements.

Essential Case Slides 10/21 Essentials of Preparing a Case Preparing for a Case Producing a Good Case Analysis Producing Good Analyses Papers Producing a Good Firm Synopsis Other Usefuls Producing a Good Presentation **Next**

Producing a Good Case Analysis

3. Internal Analysis:

FORM

Resources, Capabilities, Core Competencies

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

CONTENT

- 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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Producing a Good Case Analysis

4. Strategy

FORM

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

CONTENT

- 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.

Essential Case Slides 12/21 Essentials of Preparing a Case Preparing for a Case Producing a Good Case Analysis Producing Good Analyses Papers Producing a Good Firm Synopsis Other Usefuls Producing a Good Presentation **Next**

Producing a Good Case Analysis

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.

Essential Case Slides 13/21 < Essentials of Preparing a Case < Preparing a Good Case Analysis < Producing Good Case Analysis Papers < Producing a Good Firm Synthesis < Other Usefuls < Producing a Good Presentation > **Next**

Producing a Good Case Analysis

6. Criteria, Evaluations & Recommendations

FORM

- 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.

CONTENT

Essential Case Slides 14/21 < Essentials of Preparing a Case < Preparing a Good Case Analysis < Producing Good Case Analysis Papers < Producing a Good Firm Synthesis < Other Usefuls < Producing a Good Presentation > **Next**

Producing a Good Case Analysis

7. Implementation

FORM

- 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.

CONTENT

Essential Case Slides 15/21 < Essentials of Preparing a Case < Preparing a Good Case Analysis < Producing Good Case Analysis Papers < Producing a Good Firm Synthesis < Other Usefuls < Producing a Good Presentation > **Next**

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.

<h1>For a Good Executive Summary</h1> 	
<p>➤ INTRODUCTION</p> <ul style="list-style-type: none"> • Explain what the firm does. • Does it note goals of the analysis? • Give a compelling interest to read. • Include a recommended strategy. 	
<p>➤ THE PROBLEM / CHALLENGE</p> <ul style="list-style-type: none"> • Opportunities & threats (competitor, industry and macro environment). • Strengths & limitations (resources, capabilities & core competencies). 	
<p>➤ THE SOLUTION</p> <ul style="list-style-type: none"> • 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). 	
<p>➤ WHY NOW</p> <ul style="list-style-type: none"> • Explain external circumstances driving change. • Note internal resources for recommendation. • Detail the need for why change now. 	
<div style="border: 1px solid black; padding: 5px;"> <p>One page, 11 pt., New Times Roman, 1/4-inch margins, 1.25 spacing</p> </div>	

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.
 - Environment.
 - Current situation.
 - 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."

For a Good Presentation ★

Over the Last Three Classes

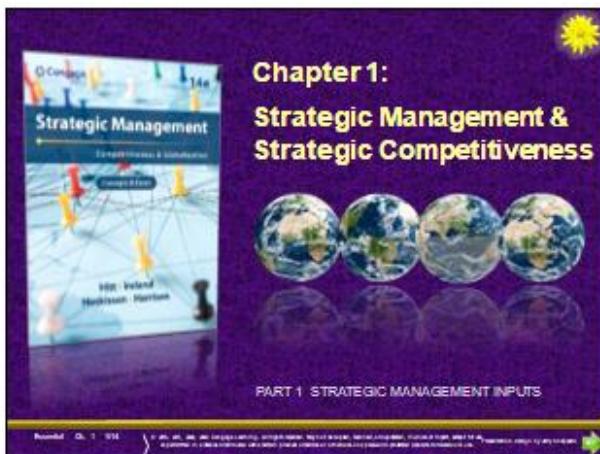
- A presentation should include all parts of an exec. summary.
 - Evidence all analysis parts were done.
- Presentations should be about 30 minutes, & 10 mins for Qs.
 - You all present, but it's a group grade.
 - Consistent written look so it seems like the group coordinated what's shown.
 - This means 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 range 0.0 - 1.0	Form	Content
Introduction			
The Problem			
The Solution			
Why now?			
Average			

Section of report	Grade range 0.0 - 1.0	Content
Strategic Objectives, Goals, Initiatives	✓	
General & Industry Environment	✓	
Resources, Capabilities & Core Competencies	✓	
Rate, Corp., Corp. & Operational Strategies	✓	
Strategic Initiatives	✓	

Report of report → Preparing a Good Case Analysis → As a Good Case → Producing a Good Case Analysis → Producing Good Analysis Pages → Producing a Good Plan → Other Models → Producing a Good Presentation → →

The Strategic Management Process ★



1

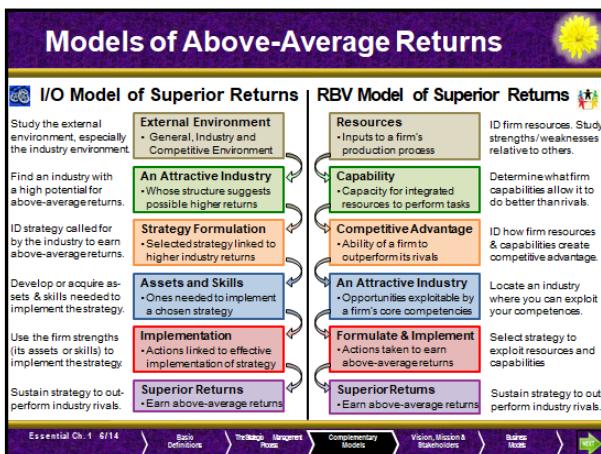
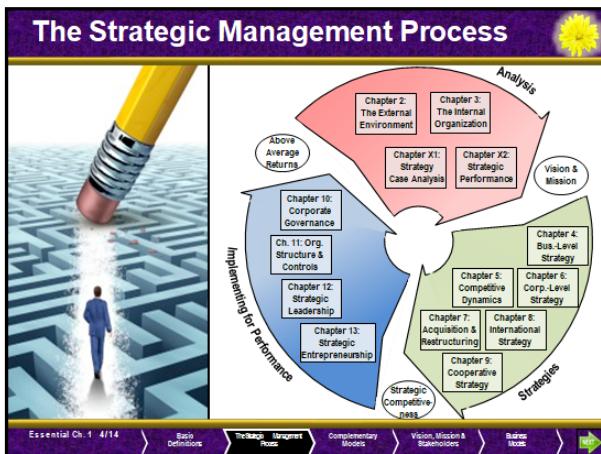
Learning Objectives

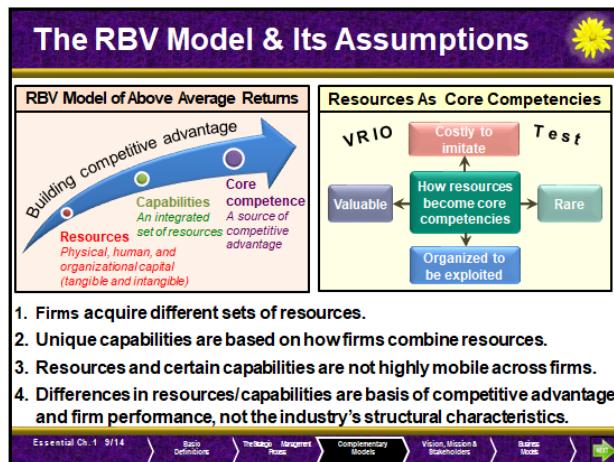
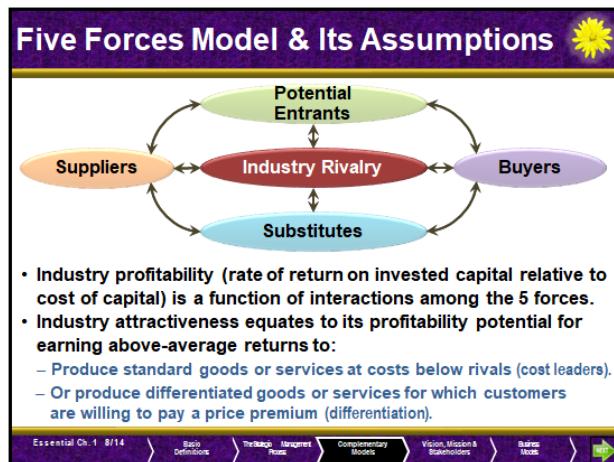
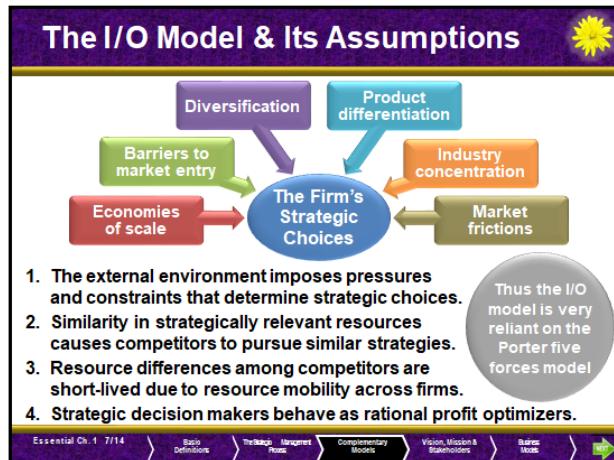
Studying this chapter should provide you with the strategic management knowledge needed to:

- Define strategic competitiveness, competitive advantage, and above-average returns.
- Explain the strategic management process.
- Use the industrial organization (I/O) and resource-based models to explain how firms earn above-average returns.
- Describe vision and mission and discuss their value.
- Define stakeholders & define their ability to influence firms.

2







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."

Essential Ch.1 10/14

Basic Definitions

The Basic Management Process

Complementary Models

Vision, Mission & Stakeholders

Business Models

16

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."

Tim Hortons

Essential Ch. 1 11/14 > Basic Definitions > The Strategic Process > Complementary Models > Vision, Mission & Stakeholders > Business Issues

The diagram illustrates the concept of Primary Stakeholders. A central purple circle is labeled "Primary stakeholders (individuals, groups, and organizations)". Four arrows point from this central circle to four colored boxes, each containing a statement about the characteristics of primary stakeholders:

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

Below the diagram, a horizontal navigation bar contains the following text: "Essential Ch. 1 12/14" and "Basic Definitions > The Stakeholder Process > Complementary Models > Vision, Mission & Stakeholders > Business Models > Stakeholder Management".

