



# 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*, 12<sup>th</sup> edition or later. Cengage. The 14<sup>th</sup> 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](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	<b>Family Week</b>		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	<b>Case Presentations</b>	Case Presentations	
	Wed. Mar. 26	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Mon. Mar. 31	<b>Case Presentations</b>	Case Presentations	
	Wed. Apr. 02	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Mon. Apr. 07	<b>Case Presentations</b>	Case Presentations	
Ends: Tue. Class	Wed. Apr. 09	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Mar. 25	<b>Case Presentations</b>	Case Presentations	
	Thurs. Mar. 27	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Apr. 01	<b>Case Presentations</b>	Case Presentations	
	Thurs. Apr. 03	Group Executive Summary	Group Executive Summary	Group Exec. Sum.
	Tue. Apr. 08	<b>Case Presentations</b>	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 25	April 01	April 08
<i>Second Choice</i>	March 25	April 01	April 08
<i>Third Choice</i>	March 25	April 01	April 08

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## Formulation Analysis Evaluation

<i>Section of report</i> <i>Range is 0.0 –4.4</i>	<b>Form</b>	<b>Content</b>
Mission, Objectives, Goals, stakeholders	<ul style="list-style-type: none"> <li>◆ Updated Information</li> <li>◆ Current Mission</li> <li>◆ Goals &amp; Objectives</li> <li>◆ Stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• If case info. needs updating, update it and bring the audience/reader up to speed.</li> <li>• Provide the firm’s current Mission &amp; Goals.</li> <li>• Who’re the stakeholders &amp; what do they want?</li> </ul>
General and Industry Environment	<ul style="list-style-type: none"> <li>◆ Macro Environment (Demographics, Economy, etc.)</li> <li>◆ Industry Environment (Porter’s 5)</li> <li>◆ Competitors (top 3 or so)</li> <li>◆ What are the industry dynamics</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly outline these elements.</li> <li>• 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</li> </ul>
Resources and Capabilities / Core Competencies	<ul style="list-style-type: none"> <li>◆ Resources (Tangible / Intangible)</li> <li>◆ Capabilities (by Functional Area)</li> <li>◆ Core Competencies (VIRO)</li> <li>◆ Performance</li> </ul>	<ul style="list-style-type: none"> <li>• 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).</li> </ul>
Business, Corp. and International Strategies	<ul style="list-style-type: none"> <li>◆ Business Level Strategy</li> <li>◆ Corporate Level Strategy</li> <li>◆ International Strategy</li> <li>◆ Cooperative Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Tell me what is their:               <ul style="list-style-type: none"> <li>- Generic Bus. level strategy is (Cost Leadership, Diff, Focus, etc.)</li> <li>- Corp. level strategy (Conglomerate, Vert. Integration Single bus., etc.)</li> <li>- International Strategy (Global, Transnational, Multidomestic).</li> <li>- Any Joint Ventures, etc.</li> </ul> </li> </ul>
Average		



## Integration, Recommendation and Implementation Analysis Evaluation


<i>Section of report</i> <i>Range is 0.0 –4.4</i>	<b>Form</b>	<b>Content</b>
Synthesis	<ul style="list-style-type: none"> <li>◆ Firm Strengths &amp; Weaknesses</li> <li>◆ Enviro. Opportunities &amp; Threats</li> <li>◆ SWOT Matrix</li> <li>◆ Does the strategy fit the SWOT</li> </ul>	<ul style="list-style-type: none"> <li>• Summarize not only the strengths &amp; weaknesses / opportunities &amp; threats but relate them to each other – how does all that you’ve said so far fit together.</li> </ul>
Selecting a Course of Action	<ul style="list-style-type: none"> <li>◆ Criteria by which you will evaluate a good recommendation.</li> <li>◆ Recommendation.</li> <li>◆ Targets and Goals</li> <li>◆ Evaluation of Recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>• Tell me what challenges a good recommendation will address.</li> <li>• Have a definitive recommendation.</li> <li>• Tell me what are the targets of your recommendations.</li> <li>• Tell me how your recommendations meet your criteria and potential targets.</li> </ul>
Implementation	<ul style="list-style-type: none"> <li>◆ Describe an Action Plan for implementation</li> <li>◆ Discuss the logic of Action Plan</li> <li>◆ Are any new organizational structure or controls needed</li> <li>◆ Criteria to evaluate change success.</li> </ul>	<ul style="list-style-type: none"> <li>• Logical &amp; appropriate Action Plan for implementing your recommendations (1<sup>st</sup> this, then)</li> <li>• Review any new organizational structure or controls needed</li> <li>• Criteria by which you will evaluate whether the change was successful.</li> </ul>
Remaining Considerations	<ul style="list-style-type: none"> <li>◆ Cover</li> <li>◆ References</li> <li>◆ Figures (like organization charts or time lines)</li> <li>◆ Tables.</li> </ul>	<ul style="list-style-type: none"> <li>• Cover has all the relevant elements (ID’s, Art).</li> <li>• Sufficient consistently properly presented alphabetical references.</li> <li>• Sufficient labeled clearly presented figures.</li> <li>• Sufficient labeled clearly presented figures.</li> </ul>
Average		



## Executive Summary Evaluation

<i>Section of report</i> <i>Range is 0.0 –4.4</i>	<b>Form</b>	<b>Content</b>
Introduction	<ul style="list-style-type: none"> <li>◆ Format allows quick access to info.</li> <li>◆ Compelling statement of interest.</li> <li>◆ Analysis goals and objectives.</li> <li>◆ Recommended strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• Explains what the firm does.</li> <li>• There's a compelling interest statement.</li> <li>• Does it note goals of the analysis?</li> <li>• Does it include a recommended strategy?</li> </ul>
The Problem or Challenge	<ul style="list-style-type: none"> <li>◆◆ Opportunities &amp; threats (competitor, industry and macro environment).</li> <li>◆◆ Strengths &amp; limitations (resources, capabilities &amp; core competencies).</li> </ul>	<p>Clearly discuss these elements:</p> <ul style="list-style-type: none"> <li>•• Opportunities &amp; threats (competitor, industry and macro environment).</li> <li>•• Strengths &amp; limitations (resources, capabilities &amp; core competencies).</li> </ul>
The Solution	<ul style="list-style-type: none"> <li>◆ Obvious &amp; clear action statements.</li> <li>◆ Clear outline of action steps.</li> <li>◆ Clear timeline.</li> <li>◆ Clearly stated goals.</li> </ul>	<ul style="list-style-type: none"> <li>• What do you want to the firm to do?</li> <li>• What steps need to be taken (logical &amp; appropriate action plan for implementation).</li> <li>• How soon do we start; with what steps?</li> <li>• How will we measure success (criteria by which you evaluate success of changes).</li> </ul>
Why Now	<ul style="list-style-type: none"> <li>◆◆ External circumstances driving change.</li> <li>◆ Internal resources for recommendation.</li> <li>◆ Compelling statement of urgency.</li> </ul>	<p>Explain:</p> <ul style="list-style-type: none"> <li>•• External circumstances driving change.</li> <li>• Internal resources for recommendation.</li> <li>• Why change now?</li> </ul>
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 <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 &amp; 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 (Missed Classes)      A+ A    A- B+ B    B- C+ C    C- D    F  
 ⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ⑦ ⑧    Comments: \_\_\_\_\_

On-time attendance (Late Classes)      A+ A    A- B+ B    B- C+ C    C- D    F  
 ⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ⑦ ⑧    Comments: \_\_\_\_\_

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

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

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

Other (Specify)      A+ A    A- B+ B    B- C+ C    C- D    F  
 ⑩ ⑨ ⑧ ⑦ ⑥ ⑤ ④ ③ ② ① ⑦ ⑧    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>	<i>12.4</i>	<i>15.5</i>	<i>18.6</i>	



**Introductory Slides:**

**Business 478: Strategy Course & Delivery**

PART 0 Help with Strategy

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**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, Effectiveness, Student-centered, Data, Affairs, Services, Programs, Performance, Student goals, Activity, Facilities, Improvement, Organizational, Learning, Evaluation, Quality, Effectiveness, Student-centered.

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**Intro. to Bus. 478: Strategy / 2025 D4700 Tue. 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.**

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## 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, 12<sup>th</sup> or later Ed



Presented Info. Videos 1011 Course Description 1012 Grades & Funding 1013 Group Schedule 1014 Class Assignments 1015 Strategic Analysis 1016 Group Peer Evaluation 1017 Self Evaluation & Study

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## 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



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## 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.

  
 These folks look WAY too happy!

**CONVERSION**

Presented Info. Videos 1011 Course Description 1012 Grades & Funding 1013 Group Schedule 1014 Class Assignments 1015 Strategic Analysis 1016 Group Peer Evaluation 1017 Self Evaluation & Study

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### Group Selection Form

Name	Student ID #	Title	Concentration
Steve Jobs	20311-1234	CEO	Marketing
Andy Grove	20302-1415	COO	Mgmt. Science
Phillip Kivas	20210-1234	CMO	Marketing
Mike Milkin	20311-5678	CFO	Finance
Richard Branson	20102-1234	CHR	D. Technology
Bill Gates	20302-4321	C I O	D. Law

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

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### Class Assignments: The Basics

Date	Topic	Class Details	Readings
Tue. Jan. 07	Strategic Mgmt.	Strategic Mgmt. & Cases	Ch. 1, Case Pwr. Pts
Tue. Jan. 14	Ex- & Internal Enviro	Enviro. & the IMI Case	Ch. 2 & 3 & The IMI Case
Fri. Jan. 17	<b>GROUP LISTS DUE</b>		
Tue. Jan. 21	Business & Corp. Level Strategies	Bus. & Corp. Level Strat.s & Exercises A & B	Chapters 4 and 6 & Exercises A & B
Tue. Jan. 28	Competitive Rivalry & Dynamics at Home		Ch. 5 & Format Pwr. Pts
Tue. Feb. 04	International Strategy	International Strat. & Toms	Ch. 8 & The Toms Case
Tue. Feb. 11	Cooperative Strategy	Cooperative Strat. & The Carlsberg Case & Slides	Chapter 9 & the Carlsberg Case & Slides
Fri. Feb. 14	<b>Individual Formulation Analysis Due on Pandora</b>		
Tue. Feb. 18	<b>FAMILY WEEK</b>		
Tue. Feb. 25	Organizational Structure & Control	Structure and Control & The Deepwater Horizon	Chapter 11 & The Deepwater Horizon Case

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### Class Assignments: Applications & Ends

Date	Topic	Class Details	Readings
Tue. Mar. 04	Restructuring	Restructuring & Exercise C	Chapter 7 & Exercise C
Fri. Mar. 07	<b>Individual Integration Recommendation and Implementation Analysis on Pandora</b>		
Tue. Mar. 11	Corp. Governance & Leadership	Corp. Governance, Leadership & Exercise D	Chapters 10 & 12 & Exercise D
Fri. Mar. 14	<b>Individual Executive Summary Due on Pandora</b>		
Tue. Mar. 18	Strat. Entrepreneur & the Future	Strategic Entrepreneurship, the Future & Exercise E	Ch. 13, Being a futurist & Exercise E
Fri. Mar. 21	<b>Group Case Synopsis Due</b>		
Tue. Mar. 25	Case Presentations (Group Exo. Sum. due Mar. 27)		
Tue. Apr. 01	Case Presentations (Group Exo. Sum. due Apr. 03)		
Tue. Apr. 08	Case Presentations (Group Exo. Sum. due Apr. 10)		

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## Grade for Formulation Analysis ★

Section of report <small>Grade range is 0.0 – 4.3</small>	Form	Content	<b>SUBHEADINGS!</b>
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



Download Info: 11/23

Course Introduction > Text & 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	<b>SUBHEADINGS!</b>
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.*



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## Grade for Executive Summary ★

<https://www.inc.com/guides/2010/08/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?



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## 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
INTRODUCTION

Executive summary provides a condensed version of the main document.  One can understand the gist of a text by reading the executive summary.	Introduction introduces the document. It explains what the document is about.  One cannot understand the content of a text by merely reading the introduction.	Contains all important elements of the text, including recommendations and conclusions.  Can be read as separate documents.	May contain background information, thesis statement, other material of central interest, definition of terms and objectives of the text.  Cannot be read as separate documents.
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Overview | Info | Video | 10/18 | > Content Introduction | > Text & Content Description | > Grades & Feedback | > Group Evaluation | > Data | > Backgrounds | > Background Analysis | > Group Peer Evaluations | > Self-Reflection & Study | >

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## Group Peer Evaluations ★

Group Name: \_\_\_\_\_

Grade range is 0.0 - 4.3.		
Title	4 Person Group	Comments
CEO:	3.7	OK
COO:	3.5	So-So
CNO:	3.8	Good!
CFO:	1.4	zzzzzz
CHR:		
Total:	12.4	



Peer Evaluation

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

Overview | Info | Video | 10/18 | > Content Introduction | > Text & Content Description | > Grades & Feedback | > Group Evaluation | > Data | > Backgrounds | > Background Analysis | > Group Peer Evaluations | > Self-Reflection & Study | >

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## Sundry Material ★

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



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

↓

A rose means Uber-Text notes

A star means an important point!

Overview | Info | Video | 10/18 | > Content Introduction | > Text & Content Description | > Grades & Feedback | > Group Evaluation | > Data | > Backgrounds | > Background Analysis | > Group Peer Evaluations | > Self-Reflection & Study | >

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## 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



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## 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.



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## 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

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## 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.'

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## 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.



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## Producing a Good Case Analysis


### 1. Mission, Objective, Goals & Stakeholders




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

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- 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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## 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.

• Clearly detail the above elements.

**CONTENT**

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## 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.**

• **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.**

- **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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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.

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Producing a Good Case Analysis

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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Producing a Good Case Analysis

7. Implementation

FORM

CONTENT

- Plan of Action (What to do 1<sup>st</sup>, 2<sup>nd</sup>, 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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## 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 min.s for ?s.
  - You all present, but its 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 size & bullets, etc.
    - Minimum 18 point type.
    - Spelling & Grammar count
- The Word™ Exec. Summary is due two days after presenting.

Section of report		Grade	Form	Content
Introduction				
The Problem				
The Solution				
Why now?				
Average				

Section of report	Grade	Section of report	Grade
Introduction		SWOT & Synthesis	
Analysis, Diagnosis, Goals, Objectives		Criteria, Success/Failure	
General & Industry Environment		Implementation	
Resources, Capabilities & Core Competencies		Strategic Coordination	
Fin, Corp, Comp & International Strategies			

Presented Case Wiley 1921

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## The Strategic Management Process ★

Presented Case Wiley 1921

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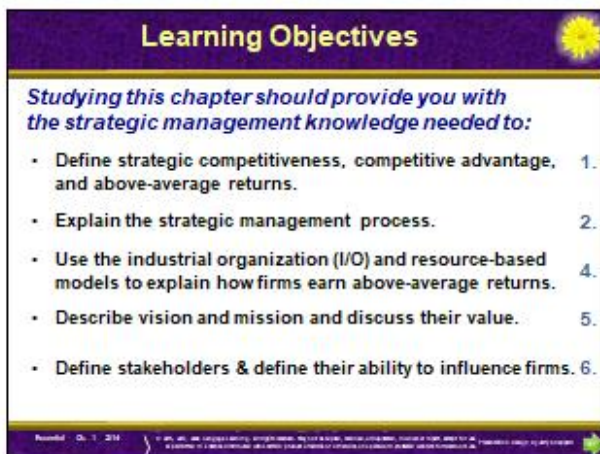
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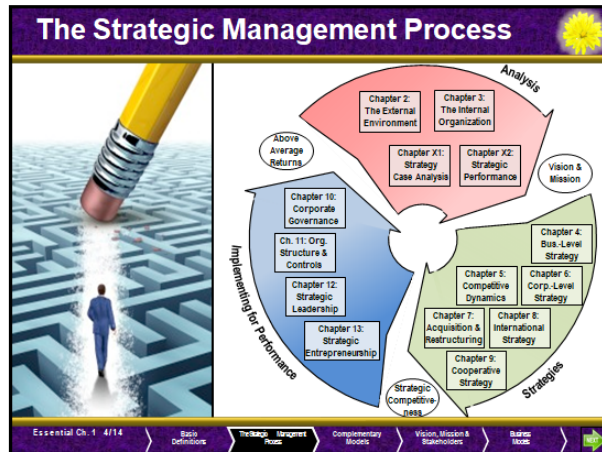
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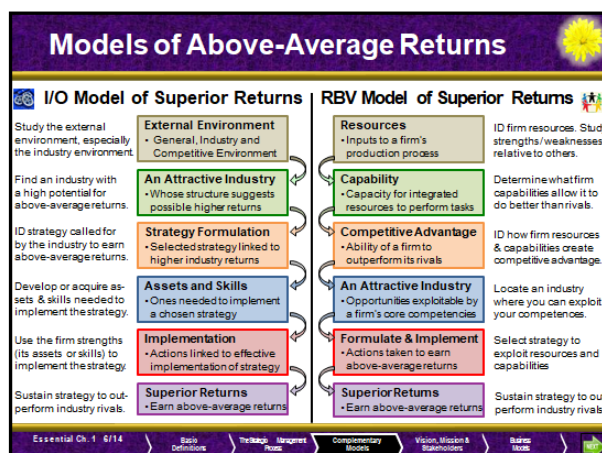
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## The I/O Model & Its Assumptions

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

Essential Ch. 1 7/14 > Basic Definitions > The I/O Model > Management Process > Complementary Models > Vision, Mission & Stakeholders > Strategic Issues > End

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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).

Essential Ch. 1 8/14 > Basic Definitions > The I/O Model > Management Process > Complementary Models > Vision, Mission & Stakeholders > Strategic Issues > End

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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.

Essential Ch. 1 9/14 > Basic Definitions > The I/O Model > Management Process > Complementary Models > Vision, Mission & Stakeholders > Strategic Issues > End

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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."*

Essential Ch. 1 10/14 > Basic Definitions > The Strategic Management Process > Complementary Models > Vision, Mission & Stakeholders > Strategic Issues > 

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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."*

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

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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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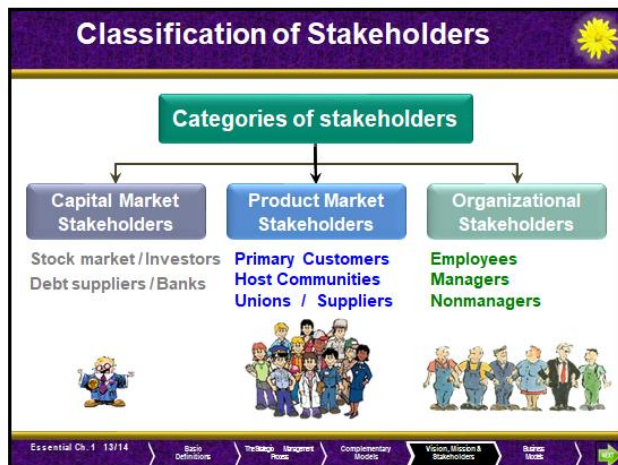
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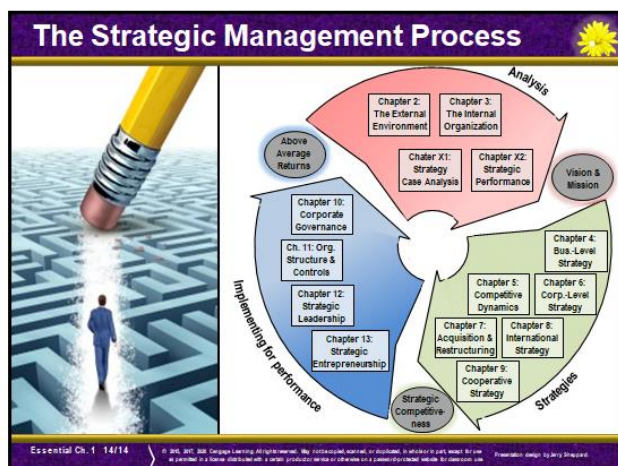
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