

COURSE: BUS 478, Section D 100
TITLE: Strategy
SEMESTER: Fall 2024 (1247)
CLASSROOM: D 100 WMC 3250 Thursday, 11:30 – 2:20
D 400 WMC 3250 Monday, 9:30 – 12:20
D 500 WMC 3250 Monday, 2:30 – 5:20

INSTRUCTOR: Jerry Sheppard
Office: WMC 4387
Hours: Monday: 12:45 – 2:15
Thursday: 10:40 – 11:20
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, *Strategic Management, Competitiveness and Globalization, Concepts*, 12th edition or later. Cengage. ISBN: 9781305502208.

Grades

Individual Written Grades

Strategy Formulation	16%
Integrate- Recommend- Implement	16%
Written Executive Summary	16%

Individual Participation Grades

Participation	11%
Presentation Performance	7%
Peer Evaluated Group Contribution	6%

Group Work Grades

Written Case Synopsis	8%
Case Presentation	10%
Written Executive Summary	10%

Class participation

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

Individual Analyses & Executive Summary

Individual firm strategic formulation and implementation analyses, along with an Exec. Summary are on the **Boozt Group** 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://usercontent.one/wp/www.casecompetition.com/wp-content/uploads/2024/02/CCC-x-Boozt-Invitational-case-2024.pdf>

Scale Conversions

Scale conversions on all assignments are as follows:

$$\text{GPA Grade} = [\% \text{ Grade} / 7] ^ .5$$
$$\% \text{ Grade} = [\text{GPA scale} ^ 2] \times 7$$

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 3.15.

Groups also write a 5-8 page synopsis of a firm of their choice covering firm history, environment, current state, and main strategic challenges. Near the term's end groups present a 30-40 minute analysis of the firm. Groups then have two days to hand in a written Executive Summary of their analysis.

Session Breakdown

Most sessions include a short 'Essentials' lecture on main chapter points, a strategy-based exercise and / or a case (a 33%, 67% split).

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

Schedule

	Class	Topic Detail	Tasks	Hand in
Formulation & Integration	Thur. Sept. 05	Intro. to Strategic Management. Strategy Case Analysis.	Read Chapter 1. Look over the Case PowerPoint Slides.	
	Thur. Sept. 12	External & Internal Environment.	Read Chapters 2 and 3. Prepare to discuss The IMI Case.	
	Tue. Sept. 17	Group lists.	Hand in Group lists.	Group Lists
	Thur. Sept. 19	Business Level Strategy. Corporate Level Strategy	Read Chapters 4 and 6. Prepare to discuss Exercises A & B on RVs.	
	Thur. Sept. 26	Competitive Rivalry & Dynamics. International Strategy.	Read Chapters 5 and 8 Prepare to discuss The Tom's Case.	
	Thurs. Oct. 03	Cooperative Strategy.	Read Chapter 9 Prepare to discuss the Carlsberg Case. Devise a critique of the Carlsberg slides.	
	Tue. Oct. 08	Formulation Analysis.	Hand in Individual Formulation Analysis.	Formulation analysis for Boozt
Implementation	Thurs. Oct. 10	Organization Structure and Controls.	Read Chapter 11. Prepare to discuss the Deepwater Horizon Case.	
	Thurs. Oct. 17	Restructuring.	Read Chapter 7. Prepare to discuss Exercise C: A to Z.	
	Tue. Oct. 22	Individual Integration, Recommendation & Implementation Analysis.	Hand in individual Integration, Recommendation and Implementation Analysis.	Boozt integration, recommendation & implementation
	Thurs. Oct. 24	Corporate Governance & Leadership.	Read Chapters 10 & 12. Prepare to discuss Exercise D: Bayer.	
	Thurs. Oct. 31	Getting hit by Technology	Prepare to discuss the Diamond Industry. *	
	Tue. Nov. 05	Individual Executive Summary	Hand in Individual Executive Summary.	Boozt Exec. Sum.
	Thurs. Nov. 07	Strategic Entrepreneurship. The Future.	Read Ch. 13 and the article <i>How to do Strategic Planning like a Futurist.</i> ** Prepare to discuss Exercise E: Futures.	
Ends	Tue. Nov. 12	Group Case Synopsis	Group Case Synopsis.	Group Synopsis
	Thurs. Nov. 14	Section D100 Case Presentations	Case Presentations.	
	Sat. Nov. 16	Group Executive Summary	Group Executive Summary.	Group Exec. Sum.
	Thurs. Nov. 21	Section D100 Case Presentations	Case Presentations.	
	Sat. Nov. 23	Group Executive Summary	Group Executive Summary.	Group Exec. Sum.
	Thurs. Nov. 28	Section D100 Case Presentations	Case Presentations.	
	Sat. Nov. 30	Group Executive Summary	Group Executive Summary.	Group Exec. Sum.

* This can be found at

<https://web-assets.bcg.com/e7/54/63bd097349489401bb57b035c74a/bcg-the-future-of-the-natural-diamond-industry-2.pdf>

** 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.

Bus 478 Group Selection

COURSE: BUS 478-3**TITLE:** StrategyNOTES: [HTTP://WWW.SFU.CA/~SHEPPARD/INDEX.HTML](http://WWW.SFU.CA/~SHEPPARD/INDEX.HTML)**INSTRUCTOR:** Dr. J. Sheppard

Office: WMX 4387

E-mail: sheppard@sfu.ca

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>	November 14	November 21	November 28
<i>Second Choice</i>	November 14	November 21	November 28
<i>Third Choice</i>	November 14	November 21	November 28

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 <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

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 $\frac{1}{2}$ -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 & 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>				
Total:	12.4	15.5	18.6	

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, Thurs. 10:40-11:20 & by Appt For an appointment contact me in person, by phone or E-mail & we'll set-up an appt.

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.

Required Info. Syllabus 4/18 > Course Introduction > Text & Casebooks > Syllabus & Ending > Course Activities > Case Assignments > Strategic Analysis > Group Projects > Self Evaluation & Study > 

4

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.

Required Info. Syllabus 4/18 > Course Introduction > Text & Casebooks > Syllabus & Ending > Course Activities > Case Assignments > Strategic Analysis > Group Projects > Self Evaluation & Study > 

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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 / 7] ^ .5
% Grade = [GPA scale ^ 2] X 7

Ethical Not doing your own work on individual assignments, plagiarism or insufficient citation may get you a zero.

CONVERSION

These folks look WAY too happy!

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
Richard Branson	20102-1234	CHR	D. Technology
Bill Gates	20302-4321	CIO	D. Law

You need to find a group & a company to analyze by Sep. 19. 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
Thur. Sep. 05	Strategic Mgmt.	Strategic Mgmt. & Cases	Ch. 1, Case PowerPoints
Thur. Sep. 12	External / Internal Environment	Enviro, & the IMI Case	Chapters 2 and 3 & The IMI Case
Thur. Sep. 19	GROUP LISTS DUE		
Thur. Sep. 19	Business & Corp. Level Strategies	Strategies & Exercises A & B	Chapters 4 and 6 & Exercises A & B
Thur. Sep. 26	Competitive Rivalry & International Strat	Rivalry, International & The Toms Case	Chapters 5 and 8 & The Toms Case
Thur. Oct. 03	Cooperative Strategy	Cooperative Strat. & The Carlsberg Case & Slides	Chapter 9 & the Carlsberg Case and Slides
Tue. Oct. 08	Individual Formulation Analysis Due on Boozt		
Thur. Oct. 10	Organizational Structure & Control	Structure and Control & The Deepwater Horizon	Chapter 11 & The Deepwater Horizon Case
Thur. Oct. 17	Restructuring	Restructuring & Exercise C	Chapter 7 & Exercise C

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Class Assignments: Applications & Ends

Date	Topic	Class Details	Readings
Tue. Oct. 22	Individual Integration Recommendation and Implementation Analysis on Boozt		
Thur. Oct. 24	Corp. Governance Leadership	Corp. Governance, Leadership & Exercise D	Chapters 10 & 12 & Exercise D
Thur. Oct. 31	Getting hit by Technology	Prepare to discuss the Diamond Industry	Future of the Natural Diamond Industry
Tue. Nov. 05	Individual Executive Summary Due on Boozt		
Thur. Nov. 07	Strat. Entrepreneurship & the Future	Strategic Entrepreneurship, the Future & Exercise E	Ch. 13, Being a futurist & Exercise E
Tue. Nov. 12	Group Case Synopsis Due		
Thur. Nov. 14	Case Presentations (Group Exec. Sum. due Nov. 16)		
Thur. Nov. 21	Case Presentations (Group Exec. Sum. due Nov. 23)		
Thur. Nov. 28	Case Presentations (Group Exec. Sum. due Nov. 30)		

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Grade for Formulation Analysis		
Grade range is 0.0 – 4.3		
Section of report	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 competencies (VRIO).		
Subheadings include Business, Corp., International & Co-op. Strategies.		
Average		

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!

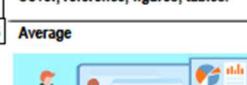
SWOT & how Strengths match Opportunities & how Weaknesses exacerbate Threats.

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.

Grade for Executive Summary

<https://www.lrc.org/guides/2010s/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. Skills 12:00 Course Introduction Ted & Course Description Grade & Grading Group Induction Class Assignments Strategic Analysis Snap Peer Induction Self Evaluation & Study

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 presents a condensed version of the main document	Introduction introduces the document & explains what the document is about	Contains all important information in the text including recommendations and conclusions	May contain background information, definitions of critical terms, definition of terms and structure of the text
One can understand the gist 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

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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
CMO:	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 Dec. 02, 2024

14

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 power point presentations include:

A rose means Über-Text notes

A star means an important point

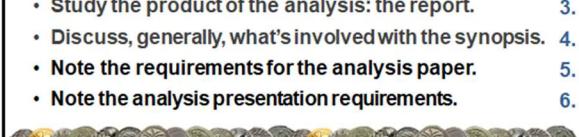
There's also some material on the bottom of the slide so you know how much longer the prof. is going to ramble on.

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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



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

<h1>Preparing for a Case</h1>	
<h2>1. Gaining Familiarity</h2> <ul style="list-style-type: none"> ➢ 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. 	
<h2>2. Recognizing Symptoms</h2> <ul style="list-style-type: none"> ➢ List all indicators (including stated “<i>problems</i>”) that something is not as expected or as desired. ➢ Ensure symptoms are not assumed to be a problem (symptoms lead to identifying problems): <ul style="list-style-type: none"> • You may want to correct symptoms, not true problems. • True problems are states or situations requiring solution before firms’ or persons’ performance can improve. 	
<p>Essential Case Slides 4/21</p>	

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

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









Essential Case Slides 7/21

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
PISS POOR
PERFORMANCE





action
planning

Essential Case Slides 8/21

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

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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:



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).

Producing a Good Case Analysis

4. Strategy

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

FORM

- 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.

CONTENT

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Producing a Good Case Analysis

5. SWOT & Synthesis

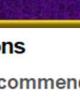
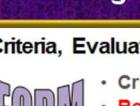
FORM
CONTENT

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.

Producing a Good Case Analysis

6. Criteria, Evaluations & Recommendations



FORM

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

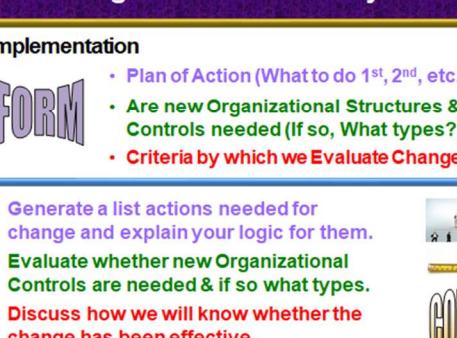
- What are the criteria for a good recommendation.
- Recommend a course of action.**
- Tell me what you seek to achieve through your recommendations.**
- Evaluate your recommendation based on the criteria.



CONTENT

Producing a Good Case Analysis

7. Implementation



- 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!

The Web Page has a blank analyses with very useful advice.

For a Good Executive Summary 

- **INTRODUCTION**
 - Explain what the firm does.
 - Does it note goals of the analysis?
 - Give a compelling interest to read.
 - 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 to 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, ½-inch margins, 1.25 spacing

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 term synopses on the Groups page of the Business 478 Webpage.

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 minutes for Q&A.
 - 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.

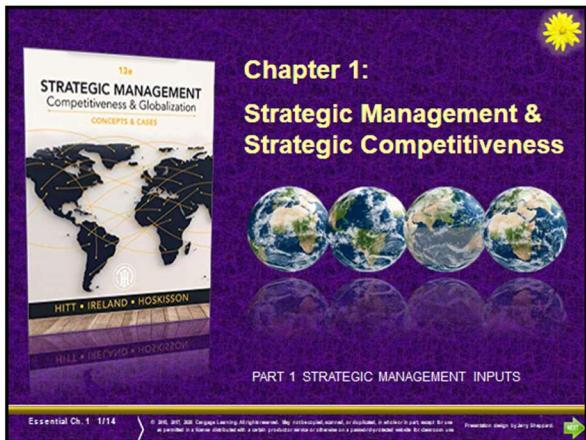
Section of Report (range is B-F, I-J)	Grade	Form	Content
Introduction			
The Problem			
The Solution			
Why now?			
Average			

Section of Report (Grade range B-F, A-J)	Covered	Section of Report (Grade range B-F, A-J)	Covered
Wholes, Objectives, Goals, Introductions	✓	WRIIT A. Symbols	✓
General & Industry Environment	✓	Criteria, Requirements, Targets, & Evaluation	✓
Resources, Capabilities & Core Competencies	✓	Implementation	✓
Int. Corp., Corp. & International Strategies		Monitoring & Controlling	

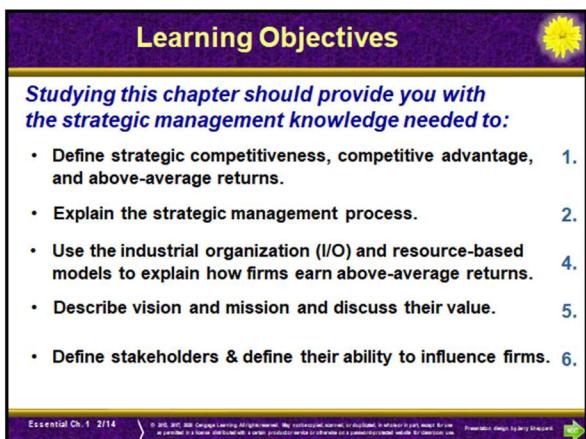
Presented: Date: Slides: 1821 > Readiness of Preparing & Giving > Preparing for a Good Analysis > Preparing a Good Analysis Report > Preparing a Good Final Synopsis > Other Skills > Preparing & Giving Presentations

The Strategic Management Process

Presented: Date: Slides: 2020 > Readiness of Preparing & Giving Presentations > Preparing & Giving Presentations



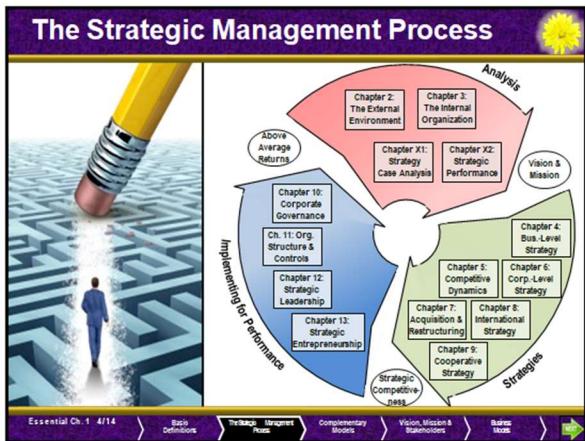
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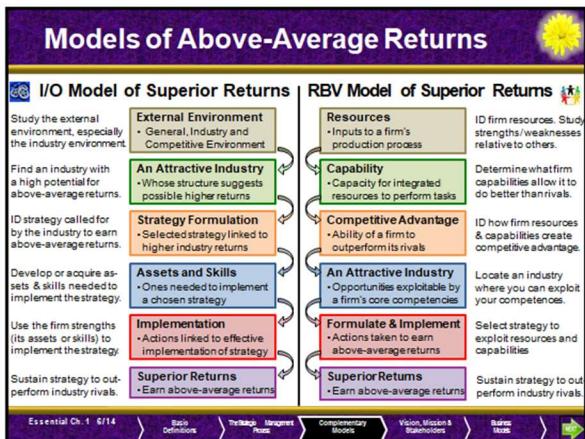
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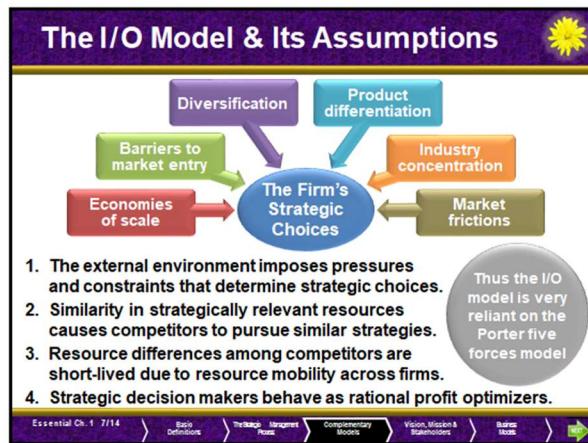
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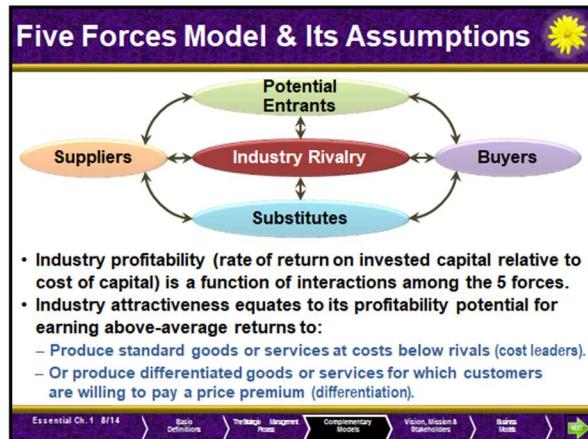
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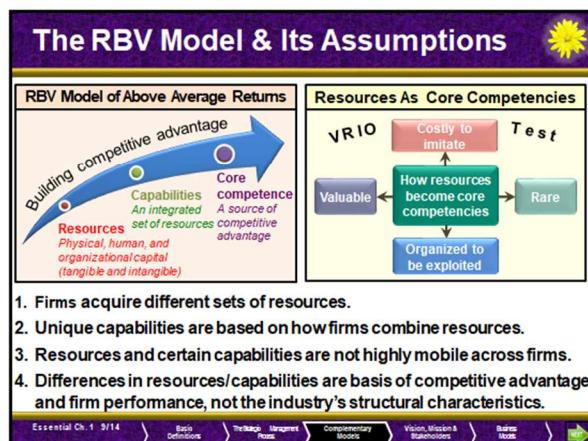
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7



8



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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.

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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."

Tim Hortons

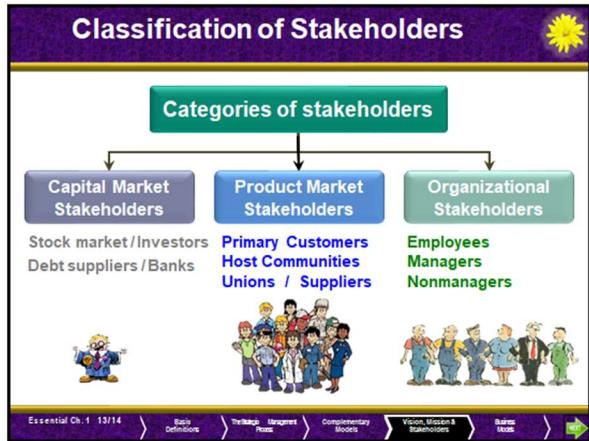


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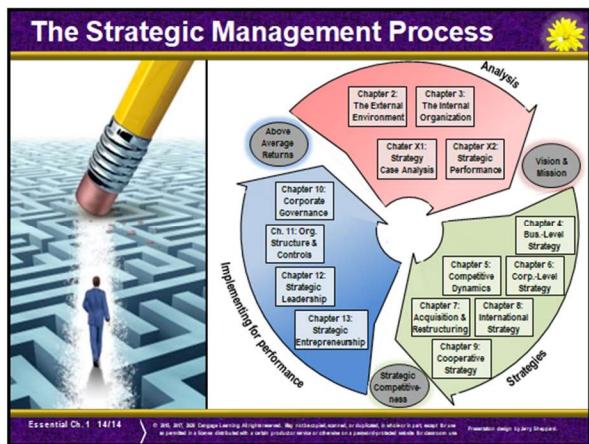
The diagram illustrates the characteristics of primary stakeholders using a purple circle on the left and four colored boxes on the right, connected by arrows.

- Primary stakeholders (individuals, groups, and organizations)** are connected to four statements:
 - Can affect development of the firm's vision and mission** (green box)
 - Are affected by the strategic outcomes achieved by the firm** (blue box)
 - Can have enforceable claims on the firm's performance** (red box)
 - Are influential when in control of critical or valued resources** (orange box)

12



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