

# Sam Houston State University

*College of Business Administration*

## Management 4390: Strategic Management & Policy SPRING 2018

**Section 4390 05/Course No. 23888**

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and by appointment.**

**Class: Tuesday & Thursday, 11:00 am – 12:20 pm**

**Location: SHB 140**

**Latest Version: Jan. 12, 2018**

### Course Overview and Objectives

This is a **learning-by-doing** course – your agreement to actively participate on a regular basis is a prerequisite for your enrollment in this class. Please read, complete, and sign the course agreement on the last page of this syllabus and return it to the instructor at the beginning of the second class, **January 23, 2018**.

This course is designed to enable students to analyze business situations from the point of view of the practicing general manager. General Managers have responsibility for making strategic decisions that insure the long-term health of the entire firm or a major division. The key tasks involved in general management include the detection of and adaptation to environmental change, the procurement and allocation of critical resources, the integration of activities across subparts of the organization, and, at the most senior levels, the determination of corporate purpose and direction.

Communication is integral to general management. Therefore, as discussed further below, your active participation in class discussions is critical to your performance in this class. Moreover, there will be few lectures in this class. Perhaps more than any other subject, strategy is learned best from analyzing real cases: putting yourself in the shoes of a general manager who has to solve real strategic problems. So the emphasis in this class is on active learning, not passive learning. Thus, you are expected to show a high level of commitment to preparing for class each day.

### Course Objectives

1. Development and reinforcement of a general management point of view – the capacity to view the firm from an overall perspective, in the context of its environment.
2. Development of an understanding of fundamental concepts in strategic management: the role of the general manager, the levels and components of strategy, competitive analysis, and organizational evolution and change.
3. Synthesis of the knowledge gained in previous courses and understanding what part of that knowledge is useful to general managers.

4. To enhance your critical thinking skills. Critical Thinking is an active, comprehensive exploration process for formulating opinions, drawing conclusions, and making decisions. Critical Thinkers use evidence and logic to form and evaluate theories. The Critical Thinking Process involves asking pertinent questions, gathering relevant evidence, evaluating assertions based on the facts, and drawing reasoned conclusions. Critical Thinking is an ongoing process where beliefs and assumptions are continually assessed and revised in light of new evidence.
5. Development of a better understanding of the inner workings of large and/or complex organizations – the goal being for students to better understand their future work environment.
6. Development of an awareness of the impact of external environmental forces (technological, governmental, demographic, social, etc.) on business and corporate strategy.
7. Practice in distinguishing between basic causes of business problems and attendant symptoms.
8. Practice in working out business strategies and implementation plans.
9. Development of habits of orderly, analytical thinking and skill in reporting conclusions effectively in both written and oral form.
10. Familiarity with some of the practical realities of running different types of businesses.

## Course Description

This course is designed to introduce the concepts, tools, and principals of strategy formulation and competitive advantage. It focuses on the information, analyses, organizational processes, skills and business judgment that executives must use to craft strategies to maximize long-term profits in the face of uncertainty and competition.

The course is integrative and interdisciplinary in two important regards:

1. The course assumes a broad view of the environment that includes competitors, buyers/consumers, suppliers, technology, economics, capital markets, and government both locally and globally. It assumes that the external environment is dynamic and characterized by uncertain changes. This course draws together and builds on all ideas, concepts, and theories from your functional courses such as Accounting, Economics, Finance, Marketing, Organizational Behavior, and Statistics. However, it is much more than a mere integration of the functional specialties within a firm.
2. The course takes a general management perspective. It views the firm as a whole, and examines how policies in each functional area are integrated into an overall competitive strategy. We designed this course to develop the “general management point of view” among participants. This point of view is the BEST vantage point for making decisions that affect long run business performance. The key strategic business decisions of concern in this course involve determining and shaping organizational purpose to evolving opportunities, creating competitive advantages,

choosing competitive strategies, securing and defending sustainable market positions, and allocating critical resources over long periods. Decisions such as these can only be made effectively by viewing a firm **holistically** and over the long term.

This course is designed to help you develop skills for formulating and implementing strategy. These skills will help you in whatever job you accept after graduation as well as in your personal investing and employment choices. The strategy formulation and integrative processes demands the mastery of a body of analytical tools and the ability to take an integrative point of view.

## Student Conduct

Students enrolled in this course are expected to adhere to the highest standards of professional conduct. In order to create an environment of mutual respect students are expected to exhibit and practice professional behaviors that exemplify the following:

- **Respect** for student peers, faculty, guests, university property, and policies.
- **Responsibility & Accountability** for one's choices and actions.
- **Professional & Courteous Communication** in all forms, and at all times.

Additionally, all students are expected to avoid unprofessional behaviors that detract from an environment of mutual respect. Unprofessional behavior consists of, but is not limited to actions that may be perceived as sleeping in class, showing up late to class, reading materials other than those assigned for this class, leaving class early, chit-chatting in class, failing to turn off cell phones, passing notes, surfing the web, text messaging, eating in class, rudeness, sarcasm, etc. Such behaviors may negatively impact your overall grade. *I reserve the right to reduce the final grade of any student who engages in behavior that interferes with the learning process for other students, inhibits my ability to teach most effectively, or diverts energy away from the objectives of this course.*

## Required Course Material

**Both REQUIRED course materials must be purchased by EACH student, in order to receive a FINAL grade in the course.**

1. **Textbook: Strategic Management** – Concepts and Tools for Creating Real World Strategy in conjunction with Wiley Plus (Dyer/Godfrey/Jensen/Bryce). The text is available via the bookstore and online. **Students receive a larger discount by purchasing the materials via WileyPlus.com through Blackboard.**
2. **Case Pack:** Available at <http://cb.hbsp.harvard.edu/cbmp/access/66197570>  
Start by registering at <http://cb.hbsp.harvard.edu>, then use the URL above to access the case pack for our course.

We will use materials from the **course pack (CP)** during the **second class session**.

Please make sure you obtain the course pack right away.

## Course Requirements and their Weights in Course Grade

	Component	IND/ GRP Task	Points
1.	Class Contribution (20 sessions @ 10 pts/session)	IND	200
2.	Case Write-ups (3 cases @ 100 pts/case)	2 IND/1 GRP	300
3.	Final Project – Company Analysis	GRP	150
4.	Individual Contributions to Group	IND	100
5.	Current Event (2 events @ 25 pts/event)	IND	50
6.	POP Quizzes	IND	100
7.	Midterm Exam	IND	100
Total Points			1000

Course grades are assigned on the following basis: 1000-900 = A; 899-800=B; 799-700=C; 699-600=D; below 600 = F.

Final point scores for the course *are not* rounded up. If you have concerns about your performance or course grade, these should be addressed with the instructor immediately.

### Grade Disputes

Grade disputes must be discussed with the professor within one week of grade receipt. Any grade disputes realized after the one-week window may be discussed, but will not impact your grade.

## Class Format

### The Case Method: Why We Rely on Discussion Learning

Approximately three-fourths of our class time will be spent discussing business cases. Why do we rely on the case method so extensively? The case-study method brings a “real world” approach to business education in at least three important ways.

First, case discussions generate a dynamic process of vigorous questioning and responding, examination and debate among students and discussion leader. Because strategy issues are often characterized by ambiguity, complexity or uncertainty, this course is more about *asking the right questions* than it is about knowing the right answers. Rather than simply lecture about the current state of “best practices,” we recognize that theories change over time while reasoning skills survive. The case method helps students to refine their skills as insightful questioners, rather than just good answer-finders. In addition, discussion learning requires all students to participate **actively** in the learning experience. A business degree is about more than just acquiring a toolbox of analytical skills. It is also about developing the ability to contribute to the group so that we expand the boundaries of everyone’s learning. Just as in

management, there is no formula that you can follow for every case. Nevertheless, over the course of the semester, students gradually build on the combination of theory and analysis, judgment and experience to develop for themselves the ideas that the teacher seeks to communicate. While the case method requires a high level of student commitment, it also causes students to personally engage the problem and “own” the solution, so that the case method is inherently a student-oriented process.

Second, the case method trains students to think as administrators (rather than as scholars), so that they: (1) see a problem looking for solutions rather than a concept looking for applications, (2) focus on defining and prioritizing a maze of tangled problems and determining which one(s) to attack with the limited time available, (3) appreciate differing agendas and points of view, and (4) *take action*, not just report findings.

Third, by linking analysis with individual action taking, the case method encourages moral awareness by requiring students to *take a stand*. The give-and-take of case discussion often brings to the surface subtle ethical dilemmas that might otherwise be missed. The case method helps students learn to assess and embrace the tradeoffs among different stakeholders’ interests. The case method requires students to use all of their knowledge, skills and experience to respond in real time to the questions raised in class and to effectively communicate their ideas to their classmates and help to lead them to a greater shared understanding of the problem at hand. Thus, the students become the teachers.

**The key requirement of this course is that you THINK CRITICALLY.** I will ask that you add a dose of common sense and filter these ideas through your own experiences and “world view.” We will reach consensus on *some* issues, yet many among you will have differing interpretations as we proceed through the course. This is the nature of strategy and policy issues. You may find yourself occasionally frustrated by the ambiguity and the difficulty of assimilating conflicting points of view. Welcome to real life.

**Please see Appendix I attached to this syllabus for guidelines on case analysis.**

## **Class Contribution**

In a case-oriented, discussion-based class it is **your responsibility** to be thoroughly prepared to discuss each case and reading. Whether we are discussing cases or conceptual material, a critical component of the course is spirited, **informed discussion**. Toward this end, you have two responsibilities, one private and one public. On the private dimension, you should familiarize yourself with the assigned material, taking care to prepare thoroughly, and to develop informed individual responses to the material. On the public dimension, these ideas must be brought forward as a basis for rich classroom discussion. The class can then explore these ideas further in active analysis.

Background readings proceed each case assignment; refer to the readings as you prepare for each case discussion. One should strive to understand the gestalt of the case – underlying themes that explain how the different problems and opportunities facing the entrepreneur are related as well as how the concepts and/or frameworks discussed in the background readings (not just those assigned for the day, but also those read for previous sessions) may apply to them. These insights should figure prominently in your analysis and recommendations. In the past students that have prepared cases in a study group before

class have benefited greatly from the advance preparation, and therefore, **I strongly encourage you to work with a study group.**

In sum, your role in a case discussion requires you to not only learn the material contained in the assigned readings but also to assist in the learning of your classmates. To do so, you should attempt to make a meaningful contribution when you have the floor. Blandly summarizing facts in a case, repeating points made by other students, and/or simply agreeing with your classmate's arguments does not constitute a meaningful contribution. Try to focus on making comments that pass the "so-what" test. Such comments can range from an insightful interpretation of salient facts in a complex case to providing comments that build on prior discussion and move our thinking forward.

Moreover, during a case discussion it is very important that all of us listen to one another and attempt to build upon or constructively critique prior comments. Friends in other programs or my past students may offer to assist you with understanding the case, or you might be tempted to research what happened to the company after the case was written. Engaging in such activities is strongly discouraged. Not only does it impair your learning, but it will also disrupt your fellow students' learning when you speak up in class. It is important for the class to work through the issues based on case facts. Collective reasoning and discovery are critical to the success of the case method. **Please do NOT research the case company or situation beyond the case facts until after our class discussion.**

Since this is a discussion-based course, I consider attendance in every class to be very important. **If you expect to miss more than two class meetings, consider taking this course at another time, as your class participation grade will suffer.** If you do miss a class, it is your responsibility to find out from your classmates what material was covered, what additional assignments were made, and what handouts you may have missed. **Missing more than THREE (3+) case discussions will automatically lower your course grade by one letter grade.**

**LASTLY, you are expected to be prepared for EVERY class meeting.**

### **Effective Class Contribution**

Case courses work well, and are enjoyable effective learning experiences, IF everyone is an ACTIVE productive participant. Your overall class participation will be closely monitored. In grading in-class participation, I will look consider both **QUANTITY** and **QUALITY** of your class contribution; however, most emphasis will be based on the **QUANTITY** of your comments.

In-class participation is obviously a function of preparation, skills, attitude, and a willingness to actively commit yourself in front of me and your colleagues. A classroom is a cost-free environment for experimenting and learning.

With regard to quality, the dimensions that we look for include:

**Relevance** – does the comment bear on the subject at hand? Comments that do not link up with what the discussion is focusing on can detract from the learning experience.

**Casual Linkage** – are the logical antecedents or consequences of a particular argument traced out? Comments that push the implications of a fact or idea as far as possible are generally superior.

**Responsiveness** – does the comment react in an important way to what someone else has said?

**Analysis** – is the reasoning employed consistent and logical?

**Evidence** – have data from the case, from personal experience, from general knowledge been employed to support the assertions made?

**Importance** – does the contribution advance our understanding of the issue(s) at hand? Is a connection made with other cases we have analyzed?

**Clarity** – is the comment succinct and understandable? Does it stick with the subject or does it wander?

Below are a few closing tips for meaningful class contribution:

- Trust your own experiences.
- Be aware of your own values and biases. “Where you stand depends on where you sit.” Your values inevitably influence how you perceive and interpret situations. Rather than deny or hide them, make them explicit (at least to yourself).
- Value the contributions of others. There is never a one-best-way to manage, and different people often come to different conclusions about how they would handle a problem.
- Do not be satisfied with shallow analysis and pat answers from yourself, your classmates, or your professor. In the interests of saving time and making a point, we often gloss over subtleties: push forward to seek a greater level of understanding.

It is expected that ALL students will make brief notes or outlines – identify critical problems, analyze relevant numbers, do the financials, generate alternative recommended courses of action, and generate ideas about how to implement them. You should rely on these notes when contributing to the class discussion.

Students will be called on, **AT RANDOM**, to take the lead in various aspects of class discussions. The quality of contributions made affect student’s daily participation grade. Factual misstatements, comments that demonstrate a lack of adequate preparation, or comments that come late in the discussion that distract the class and indicate that the student has not been actively listening will be noted as ‘negative’ course participation.

### Contribution Grades

Your grade for class contribution will be based on a method that has successfully been used for many years by professors at the Harvard Business School. The focus of the method is to assess the extent to which a student contributes to the case discussion and to the learning environment. For each case, two of your peers and I will assign you a score ranging from 0 to 10 in accordance with the following criteria:

- 10 points, reflects an “A+ outstanding” contribution. Case-breaking insight, really cracked open the whole case. Such comments may be extremely rare.
- 9 points, reflects an “A” contribution. Very insightful comments, and/or exceptional value added to the discussion, or raised particularly relevant but so far overlooked



question. Reflects a great deal of preparation, thought, and integration of text concepts, work from other courses, ideas from other class contributors and cases.

- 8 points, reflects a “B” contribution. Insightful comments, and/or value added to the discussion, or raised questions relevant to the discussion. Reflects a satisfactory amount of preparation.
- 7 points, reflects a “C” contribution. Average preparation, simple commentary, helped move the discussion along with an incremental advancement over previous comments.
- 5 points, reflects a “D” contribution. Statement of case facts, rephrasing of comment(s) already made. Comments reflected poor or no preparation, ignorance of contributions already made by others, or lack of respect for other contributors.
- 3 points, reflects an “E” contribution. Non-participants i.e. students who do not participate in the discussion i.e. make no comments throughout the class discussion will receive this score.
- 0 points, reflects an “F” contribution. Students who miss a class will receive this score.

### **In-class Exercises & Online via Wiley Plus Learning Space (WPLS)**

In addition to case discussions, we will also engage in exercises, debates, negotiations, discussions and other activities. These exercises are meant to reinforce some of the key learning points for each topic. They may include reading other articles from the business publications, experiential learning exercises/videos, in-person and online. Student involvement in these class activities is a very important part of the learning process. The learning process will typically involve some form of group discussion, analysis and/or informal presentation. The type of exercise will vary from class to class and by topic. Your contributions to these exercises and discussions are also a part of your class contribution. In addition to your presence in-class, you will receive a grade for your active participation in discussion, posting, and blogging via WPLS.

### **Peer Grading of Contribution**

People within organizations are evaluated on the value they add to the experience of customers, suppliers, and co-workers, not just their boss. Similarly, class contribution is about creating value for the class as a whole, not just trying to tell your professor what you think he/she wants to hear. Therefore, in addition to your professor’s assessment, peer graders will also evaluate each case discussion. This means that each student in the course will be evaluated on his/her contribution to the class discussion by both his/her professor and his/her peers. Grades will be based on the value-add of your contribution.

The professor will select two peer graders at the start of most classes. Each student should be selected at least once during the term. The role of a peer grader is a very important role because the individual has a direct impact on everyone’s grades for that specific case. If you are selected and are not thoroughly prepared, I trust that you will decline to serve in this capacity. You may still participate in the case discussion.

Because graders do NOT contribute to case discussions, a separate approach is used to give them contribution scores for the class session. I will base the graders’ case score on two criteria. First, I will evaluate the quality of the grading you do by comparing your evaluations



with those provided by the other grader and myself. Second, each grader is required to submit his/her general feedback about being a grader and recommendations for how others might improve their case contribution scores within 24 hours of completing the case discussion. I will read each grader's response and factor its quality into my evaluation. A score of 10 is earned when grading is done competently and when your feedback is thoughtful and insightful. Graders will automatically receive a grade of 5 if their feedback is: (1) received after 24 hours of completing a case or (2) is superficial. Peer Graders may receive grades between 0-10. Peer Graders are in a unique position to offer advice to others and in order to capitalize on this knowledge, I will post the feedback provided by the graders on Blackboard to allow other students to see it and benefit from the graders' experience.

## Individual Contributions to Group

Each student is responsible for evaluating the efforts of themselves and their team members' contribution to the final project. Scoring for team member will be used toward determining each student's contribution to their group. *Students who fail to submit their evaluations will receive 0 points for their individual contribution to their group.*

## Case Analysis

You are required to submit a written analysis for three cases (2 completed individually and 1 with your group). You will need to submit your analysis via Turnitin (Blackboard) **BEFORE** class **(no later than 10:45 am)** **AND** a paper copy in-person in at the **beginning** of class. ***If you neglect to submit your analysis BOTH ways, you forfeit your submission for the current case. If you miss the electronic cut-off, you forfeit your submission for the current case.***

A detailed guideline for the case analysis is appended to this syllabus. Case analysis can be no longer than **two pages TOTAL** - single-spaced with 12-point Times Roman font with 1-inch margins – either 2 single-sided pages stapled together or 1-page double-sided. All formats including character spacing, line spacing etc. should be normal. In other words, please do not make any changes in the format to squeeze in more text). Each case analysis is worth **100 points** for a total of **300 points (2 IND and 1 GRP)**. **Late case analysis will NOT be accepted.**

**Choose TWO of the seven following cases to submit written analyses for individual case assignments:**

- Crown, Cork & Seal - 1989
- Steinway & Sons: Buying a Legend
- Bausch and Lomb
- Best Buy After Circuit City
- HEB: Creating a Movement to Reduce Obesity in Texas
- Microsoft: Competing on Talent
- Jollibee

**PLS Note:** Each student **MUST** submit one case analysis prior to the Midterm. The last case before the Midterm is the Bausch case which is due **March 20**. Students who **do not** submit a case analysis by March 20 will forfeit 100 points, representing one case grade.

Your group case assignment should be written using the same format as the individual case analyses. Please make sure to include the names of all of your contributing group members. You will also be responsible for leading the case discussion for your assigned group case. The instructor will provide feedback on your presentation style; however, no formal grade will be given for the group case presentation. The group presentation serves as practice for your Final Project Presentation.

## Company Expert

Students will select a company from the list of Fortune 1000 companies. As we develop class content, students will be responsible for keeping up-to-date with developments taking place with their chosen company. Students are responsible for connecting company events with the course topics. Students should expect to be called on during class to provide company insights.

Throughout the semester, we will consider how the course topics impact YOUR chosen company. We will draw upon YOUR knowledge of YOUR Company via quizzes, blogging, the Midterm, and of course, in class.

## Individual Current Event Presentation

Twice during the semester, each student will present a current event relevant to that day's topic. This is a brief presentation (5 minutes maximum) in which you introduce a company that illustrates one or more key principles related to a particular section of the course. During the 2<sup>nd</sup> class session, students will sign up to present their Current Events – You must be prepared to present your CE on the date you selected (**No rescheduling is permitted – If you fail to present the CE, you will forfeit the points for the assignment**). Following the course outline, the event should illustrate, inform, or raise questions about one of the concepts described in the reading for that week. The guidelines for this exercise are as follows:

1. Choose a company that you like, as **BOTH** of your Current Events will be about the **SAME** company.
2. Write your name on the hardcopy of the article and provide me with a copy of the current event you present **on the day you present it**.
3. Do NOT choose a company that is already covered in one of our cases or in the assigned reading, and
4. **Verbally** summarize the article and link the article to the topics of the course; Specifically linking the article to the topics covered during the most recent week
5. Clearly explain **WHY & HOW** the article is relevant to STRATEGIC MANAGEMENT and the topic of the session.

## Group Structure and Rewards

Once the student groups are formed, you will not be permitted to make any changes. In other words, the group composition must remain the same for the semester.

Each group/team is free to structure itself as it wishes. Members will share equally in the rewards, which will be a grade assigned to group assignments. It is the group's responsibility to work with its members to assure that everyone is contributing adequately. If, despite the group's efforts, there are clearly non-contributing members who should not share equally in the rewards, the group should be prepared to document for the instructor the specific instances of the problem and its efforts to deal with the member. This documentation will be given to the member in question. The individual described as non-contributing will then have an opportunity to document his/her views to the instructor in writing. A group member that

is deemed to have not contributed will have his/her group project grade component penalized. **Be a good group member and don't have this happen.**

**ANY problems with a group member MUST 1<sup>st</sup> be discussed with the individual causing the problem BEFORE it is brought to the attention of the instructor!**

## Guidance for Written Assignments

There is no formula for writing an “excellent” case analysis and group project. However, there are some guidelines to follow. For the case analyses, I do not need a restatement of the case. However, you should use case facts to support your arguments. In addition, I don't expect brilliant prose in your written assignments, but I should not have to struggle to read your paper. If you have difficulty writing, spend extra time smoothing out the edges. In addition, by considering the following types of questions as you develop your case analysis and group project, you might be able to develop more rigor and depth and have the basis for a more compelling argument. The following are offered as suggestions only:

1. Start by observing, even listing, what is going on. You can safely assume that those “problems” you listed are really symptoms.
2. What is causing the symptoms? Do some of the symptoms appear related?
3. What is the organization doing right which you don't want to disrupt or which you could build on in implementing a solution?
4. In your solution, be specific about the actions that should be taken, rather than relying on broad prescriptions such as “improve strategic capabilities” or “compete more aggressively.”
5. What factors inside and outside the firm would be supportive of or facilitate the success of your solution, and what obstacles might there be?
6. Could your solution touch off other problems? What are the risks facing your solution? Can you plan around some? Do you need a fallback position?
7. Is there adequate time and money for your solution?
8. Think through the implications of your analysis. Don't end your analysis about going from A to B with B. What is likely to happen if B is or is not achieved? Recognize the inherent tradeoffs of any line of action. Go beyond the obvious and most immediate.
9. Finally, after you are done writing the case analysis, set it aside for a day or two and come back to redraft it.

## Academic Honesty

Unethical behavior by corporations has been linked with negative performance outcomes; the same is true of unethical student behavior. It is expected that students will neither participate in nor condone activities such as cheating or plagiarism. You are expected to do your own work on all individual assignments, assessments, and exams. I encourage you to speak to other students about the issues, but do not share work or answers. Failure to follow this policy may result in **zero points** for both the receiver and provider. Also, the instructor may take any other action described in the current academic honesty policy. By placing your name on an assignment, you are affirming that the contents are your original work. Consulting work done

by students in this course in other platforms or in previous years is a violation of academic integrity. This policy will be vigorously enforced. Sharing your assignments in this course with others, whether in the course with you or not, can tempt others to violate this academic integrity policy and can result in that student's failure in the course and dismissal from his/her program.

Any evidence of cheating, collusion, fabrication, or facilitating academic dishonesty will be reported to the Dean of Students for appropriate disciplinary action. Academic Policy Statement (801213) describes academic dishonesty. Refer to the Dishonesty policy on the SAM web site for an explanation of what constitutes academic misconduct. If you violate this policy, you will receive a failing grade. Students are expected to be familiar with this policy.

## Other Administrative Details

- Much of the learning in this course occurs in-class. Thus, class attendance is vital to your success in this course. Excessive absences will hurt your grade in two ways. First, it will be difficult for you to earn good grades on assignments without having been in class. Second, absences will negatively affect your class contribution grade, as it is impossible to participate if you are not present. **If you will not be able to attend class regularly, you should not take this course.**
- **Do not wait** until the end of the semester to see me regarding problems with the course material or your performance. Your performance in this class is important to me, so please see me early for an appointment. I am almost always available via email or leave a message at the office number.
- Written assignments must be submitted at the beginning of the class session. As managers, you will not be afforded the luxury of missing deadlines (think of deadlines as "windows of opportunity").
- If you can convey your thoughts more succinctly in your written assignments, please do so! Suggested paper lengths are only UPPER limits.
- Do form independent study groups to brainstorm about cases and readings outside of class.
- Although you may discuss assignments outside of class, turning in identical assignments (when such assignments are not group assignments), plagiarizing previously written materials (whether such materials are from current or a previous term) will be considered cheating and will be penalized as allowed by university policy.
- Like entrepreneurs executing actual strategies, we may find that the course syllabus must be amended slightly as the semester progresses.

## Appendix I: Case Analysis Guidelines

### 1. Identify the strategic issue (SINGULAR) in this case – there may be several problems that require attention, however you **MUST** focus on the most salient issue for your case analysis

- A strategic issue is any issue that has the potential to fundamentally affect the company's competitive position, its strategy, its operations and its prospects. Typically, it is the issue addressing which resolves all other issues.
- The strategic issue is something that has the potential to affect the firm's competitive positioning and may be due to changes in the environment, internal resources and capabilities, questionable strategies and the like.
- More importantly, the number of strategic issues facing an organization is limited in number – at the most there are two or three such issues. Prioritize. Look not at the symptoms but the underlying cause.

### 2. Internal and External Analysis.

- a. To identify the strategic issue one needs to examine the firm's competitive positioning. The **firm's competitive positioning is arrived at after an analysis of the firm's environment (industry analysis), the firm's resources and capabilities (internal analysis) and the firm's strategies and its outcome.** Your analysis should contain a good evaluation of the internal and external issues affecting the firm.
- b. To examine the competitive position, you will need to consider all relevant information in the case, especially financial performance. Question any hidden assumptions. Make explicit all assumptions you make in order to arrive at your conclusions. Assess your logic and arguments for coherence and consistency.

### 3. Identify (suggestions for) alternative courses of action

- a. The relevant alternatives are those that most directly address the strategic issues that you have identified in the first step. The relevant alternatives should be based on the analysis that you have performed earlier. In other words, your alternatives must be consistent with the industry analysis, the internal analysis and the firm's strategies that you have identified.
- b. Second, examine whether these alternatives are really alternatives. In other words, can the firm simultaneously undertake one or two or all of the alternatives? Some decisions like a Make or Buy decision are truly mutually exclusive. On the other hand, in some other cases a firm may not be able to pursue all alternatives because the firm does not have the resources and capabilities.
- c. Include the pros and cons of each alternative? Why are some alternatives not feasible options for the firm? It is this analysis that enables you to identify and eventually recommend the alternative that you think best addresses the strategic issue that you identified.
- d. Make sure your alternatives are viable. Does the firm have the resources and capabilities to pursue the alternatives you suggest?

4. **Consider the alternatives and recommend ONE course of action. Explicitly justify your decision.**
  - a. Present your recommendation (ONE recommendation) with specific implementation details and support your decision by arguing its merits vis-à-vis the alternatives.
  - b. Evaluate your entire analysis in terms of its consistency, coherence, brevity and logic. Does it make any assumptions that you have not made explicit? Is the information used factually correct? Are the conclusions justifiable? Are they based on opinions, personal beliefs or logic and facts?
5. **Explicitly discuss the limitation of your recommendation.**
  - a. What is not covered/addressed by your chosen recommendation?
  - b. The limitation is NOT the drawback or con or downside of your recommendation, but instead a concern that is not specifically addressed.
    - i. This exercise in identifying the limitation helps to ensure you have selected the most pressing strategic issue. If the limitations are too significant, then perhaps you have chosen an inappropriate strategic issue.

# MGMT 4390: Strategic Management CAPSTONE Course

## Course Outline and Assignments<sup>1</sup>

**Jan. 18, 2018**

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### Course Introduction

**Jan. 23, 2018**

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### Session 1: The Concept of Strategy

**Reading:** The Use of Cases in Management Education (CP)

**Assignments Due, in class (*hardcopy ONLY*):**

- Submit Course Agreement
- Submit Expert Company

**Jan. 25, 2018**

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### Session 2: Company Vision

**Reading:** Building Your Company's Vision – Collins & Poras (CP)

**Assignments Due (*hardcopy ONLY*):**

- Analyze YOUR Company's Vision Statement according to the Collins & Poras article. This assignment must be typed and the hardcopy submitted in class.

**Jan. 30, 2018**

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### Session 3: Company Vision II

**Case:** Mondavi Winery (CP)

**Feb. 1, 2018**

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### Session 4: Understanding the NUMBERS

*In-Class Exercise*

**Feb. 6, 2018**

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### Session 5: What is STRATEGY?

**Reading:** Ch. 1 – What is Business Strategy? (Wiley)

**Case:** Honda (A) (CP)

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<sup>1</sup> Like managers, we may find that we need to make some modifications to the course outline as we work through the semester.



**Feb. 8, 2018**

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**Session 6: External Analysis**

Follow-up from Honda discussion

Reading: Chapter 2 (External Analysis - Wiley)

*In-Class Exercise*

**Feb. 13, 2018**

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**Session 7: Internal Analysis**

Reading: Chapter 3 (Internal Analysis - Wiley)

*In-Class Exercise*

**Feb. 15, 2018**

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**Session 8: Internal & External Analysis Combined**

Case: Cola Wars in 2006 (CP)

**Feb. 20, 2018**

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**Session 9: Internal & External Analysis Combined**

Case: Cola Wars in 2006 (CP)

**\*\* Using the Case Analysis Rubric (& Case Grading Sheet) \*\***

**Feb. 22, 2018**

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**Session 10: Review Case Analysis Tools & Carry ON ....**

**Feb. 27, 2018**

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**Session 11: Strategy Formulation**

Case: Crown Cork & Seal (CP)

**\*\*\* This is the FIRST OPPORTUNITY to submit an individual case analysis \*\*\***

**Mar. 1, 2018**

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**Session 12: Business-Level Strategies**

Reading: Chapter 4 (Cost Advantage - Wiley) & Chapter 5 (Differentiation Advantage - Wiley)

**Mar. 6, 2018**

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**Session 13: Strategy Implementation**

Case: Steinway & Sons (CP)

**Mar. 8, 2018**

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**Session 14: Ethics and Strategy Implementation I**

**Reading:** Chapter 13 (Governance and Ethics - Wiley)

*In-class Exercise*

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☺ **SPRING BREAK – March 12 - 16** ☺

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**Mar. 20, 2018**

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**Session 15: Ethics and Strategy Implementation II**

**Case:** Bausch & Lomb (CP)

**Mar. 22, 2018**

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**Session 16: Corporate Strategy**

**Reading:** Chapter 6 (Corporate Strategy - Wiley) & Chapter 7 (Vertical Integration - Wiley)

*In-class Exercise*

**Mar. 27, 2018**

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**Session 17: Competitive Strategy**

**Reading:** Chapter 10 (Innovative Strategies That Change the Nature of Competition - Wiley)

*In-class Exercise & Midterm Review*

**Mar. 29, 2018**

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**Out Session 18: \*\*\*\*\* MIDTERM (online) \*\*\*\*\***

*WHAT you can use: Notes, Textbook, and Laptop*

**Apr. 3, 2017**

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**Out Session 19: Final Project Strategy Development**

**\*\* Plan to establish the foundation of your FINAL project WITH your team!!\*\***

**Assignment:** Email the Professor the Name of the Company you intend to use for Your Team's FINAL Project

**Apr. 5, 2018**

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**Session 20: Corporate Strategy & Vertical Integration Implementation**

**Case:** Best Buy After Circuit City (CP)

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**Apr. 10, 2018**

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**Session 21: Competitive Strategy Implementation**

Case: HEB: Creating a Movement to Reduce Obesity in Texas (CP)

**Apr. 12, 2018**

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**Session 22: Competitive Strategy Implementation**

Reading: Chapter 11 (Competitive Strategy - Wiley) & Chapter 12 (Implementing Strategy - Wiley)

*In-class Exercise*

*Team Meetings with the Professor to Discuss the Final Project progress*

**Apr. 17, 2018**

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**Session 23: Competitive Strategy Implementation**

Case: Microsoft: Competing on Talent (CP)

**Apr. 19, 2018**

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**Session 24: International Strategy**

Reading: Chapter 9 (International Strategy - Wiley)

**Apr. 24, 2018**

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**Session 25: International Strategy**

Case: Jollibee (CP)

**Apr. 26, 2018**

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**Out Session 26: TEAM Work Day - TO WORK ON GROUP PROJECTS**

**\*\* No class TODAY \*\***

**May 1, 2018** \*\*\*Mandatory Attendance for all students\*\*\*

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**Session 26: Final Case Presentations**

**Business Dress REQUIRED for Presenting Groups**

\*\*\*\*\* Assignment: Complete Team Evaluations \*\*\*\*\*

**May 3, 2018** \*\*\*Mandatory Attendance for all students\*\*\*

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**Session 27: Final Presentations**

**Business Dress REQUIRED for Presenting Groups**

\*\*\*\*\* Assignment: Complete Team Evaluations \*\*\*\*\*

### Student Questionnaire & Course Agreement

(Please bring the completed and signed agreement with you to OUR 2<sup>nd</sup> CLASS on Jan. 23)

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

Name by which you would like to be  
addressed in class by your colleagues  
and the professor: \_\_\_\_\_

Major (specialization/concentration): \_\_\_\_\_

Non-SHSU Email address: \_\_\_\_\_

Phone number: \_\_\_\_\_

Are you willing to participate in class discussions? \_\_\_\_\_

Your prior work experience:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Your objectives in taking this course:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Student Agreement:** I, the above-named student, have read this syllabus and understand that much of my final grade will be based on my active participation in-class and my independent and group work outside of class.

\_\_\_\_\_

(Signature)