

SGMA 591 L03
Strategic Management

Course Outline – Fall 2015

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Office hours	Before/after class and/or by appointment
Website	http://d2l.ucalgary.ca
Lecture location	SH 202
Lecture times	Tuesdays and Thursdays, 9.30 a.m. – 10.45 a.m.
Course coordinator	Liena Kano

Course Description

Strategic Management is a senior-level capstone management course covering strategies used by firms to create and maintain competitive advantage. The need to possess superior strategies is more critical than ever because no organization can take its competitive advantage for granted in today's turbulent and global business environments. Further, as individual employees and managers of business firms, we should develop the skills to think strategically about our jobs, the organizations we work for, and the environments in which these organizations exist.

Unlike other business courses that concentrate narrowly on a particular function or piece of business, this course is a big picture course. It cuts across the whole spectrum of business and management. The centre of attention is the total enterprise and the process of its "strategic management." This process involves the analysis, formulation, and implementation of strategy that combines different "functional" resources of the firm. As a capstone course in business administration, this course allows you to synthesize knowledge and skills acquired from previous courses and to creatively apply them to strategic management issues.

Course Objectives

The major objectives of this course are to help you:

- (1) Develop a managerial judgment and the ability to think strategically about a company, its resources and competitive capabilities, its present business position, and its long-term direction;
- (2) Develop a working knowledge of fundamental strategic management issues, concepts, and frameworks; and
- (3) Integrate strategic skills and knowledge gained from other courses in the business school curriculum to understand how the various pieces of the business puzzle fit together, and why different parts of business need to be managed in strategic harmony.

Detailed course outcomes are listed in Appendix 1.

No matter what your major is, this course can be instrumental in helping you become a more savvy business person and preparing you for a successful business career. The strategic skills and holistic perspective that this course aims to help you develop will make you more marketable to prospective employers and help you plan your professional career in relation to the changing business environment.

Required Textbook and/or Other Materials

Robert M. Grant & Judith Jordan. Foundations of Strategy. Second Edition. Wiley. 2015. Available from the University of Calgary bookstore.

Cases can be purchased online. Here are the instructions for downloading assigned cases (also posted on D2L):

1. Go to the Ivey Publishing website at www.iveycases.com
2. [Log in](#) to your existing account or click "[Register](#)" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student User" role.
3. Click on this link or copy into your browser: <https://www.iveycases.com/CoursepackView.aspx?id=6857>
4. Click "Add to Cart".
5. You may choose to order in either **print** or **digital** format.
 - To order the material in digital format, check "digital download" and click "OK". **Please note that you CAN print out your downloaded digital casepack, so this is a cheaper option!**
 - To order a printed copy for delivery, enter the print quantity required and click "OK". Please note that shipping charges will apply.
6. Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the checkout process.
7. When payment has been processed successfully, an Order Confirmation will be emailed to you immediately and you will see the Order Confirmation screen.

- If you ordered digital copies: Click "Download your Digital Items" or go to "My Orders" to access the file.
- If you ordered printed copies: Your order will be printed and shipped within 2 to 3 business days.

IMPORTANT: Access to downloadable files will expire 30 days from the order date, so be sure to save a copy on your computer. The downloadable file is a PDF document that can be opened using Adobe Reader. **This material is for your personal use only and is not to be shared or distributed in any form.**

Supplementary Course Fees

The cost to download a digital course pack (see instructions above) is \$21.40.

Class Preparation & Desire2Learn (D2L)

Lectures focus on the material presented in the textbook and general discussion relating to the topic(s) outlined in the lecture schedule. Students are expected to read the assigned text chapters and readings before class, and be prepared for class discussion. Important information and additional readings for **SGMA 591 L03** are posted on Desire2Learn (D2L). Students should regularly check the Announcements section of D2L for ongoing notices. Please note that I will **NOT** post PowerPoint slides on D2L ahead of lectures, but will make them available to you after each class.

I may not necessarily cover all of the materials in the chapter, but it is your responsibility to understand the concepts presented in the textbook and lectures. If you are unsure of any of the concepts, please take the initiative to ask me during class, or approach me before or after class, send an email or post your question on D2L discussion board.

Contacting Your Instructor

If I am not available to talk right after class, please contact me. Email is the easiest way to reach me, so do not hesitate to use it; I will try to help you any day of the week (as long as I am in town or otherwise available). If you or I have detailed questions, we may need to schedule a meeting.

Proper Business Use of Email

Email is commonly used by students to communicate with their instructor. However, it does limit the effectiveness of the communications and may not be the best way for instructors to answer student questions, especially those requiring an explanation of concepts covered in this course or some personal concerns. Therefore, I may request a telephone call or personal meeting. To make sure that your email is opened and responded to in a timely manner, **please insert 'SGMA591' in the subject line of all your emails to me.** If you need to pose a content-related question, please choose D2L discussion forum over email.

Internet & Electronic Communication Devices

Any surfing of the Internet during lectures that is not directly related to the class discussion is distracting and strictly forbidden. **Please respect your fellow students and your instructor and do not disrupt the class in any way, including answering cell phone calls, checking email, texting and browsing the Internet on laptops. Please turn OFF your phone before the beginning of each class.** It is within my discretion to lower your course grade for distracting the class.

Please note that when I pose a question in class, I do not expect you to google an answer – in fact, **you should NOT use your electronic devices during class discussion time**, unless it is for taking notes. Class discussion time is typically dedicated to thinking, debating and analysing, not researching.

Grade Distribution

Class Participation - Possible bonus points for news discussion (team-based)	15% - Between 0 and 2 points
Case-based peer-to peer assessments and feedback, 4 cases	25%
Individual case assignment	25%
Strategic Assessment Project - Written team report - Group presentation	35% - 25% - 10%
	100%

Class Participation

General participation (individual)

In this course, you integrate your “functional” skills and display and practice them in an atmosphere that is far more forgiving than the real world. It is critical, to the success of this course, and urgent (since you will graduate soon) that you take this opportunity to develop your analytical and communication skills. In order to pass the class, you must participate frequently and *substantively* during the semester, at an appropriate quality level (please note that preparation, curiosity and relevance of your participation is more important than quantity *per se*). Obviously, you have to attend the class in order to participate, so attendance is required to achieve a satisfactory participation grade. If you attend class but do not participate, the maximum grade obtainable (but not automatically assigned) for the participation component is C.

The solutions to strategic management problems are varied, with no clear right or wrong answers. *The goal of the class discussions is NOT to come to a comfortable consensus but, instead, to learn about the dynamics of strategic management by grappling with difficult and complex strategic problems.* Often the best strategic solution becomes apparent over time. For this reason, the fear of being wrong **should not** inhibit your participation.

Experience suggests that the best way to overcome reticence is to be well prepared. In order to pass the participation component, you should come well prepared to each class, particularly for the case discussion classes, and be ready to answer questions/discuss your strategic analysis.

In sum, Strategic Management is not a lecture course! My key role is that of a facilitator, to help you: (a) understand and apply strategic thinking, and (b) communicate and learn from each other in class. Because your participation is so vital to the overall success of the class, I may record daily participation

grades.

Participation grades depend on the quality and quantity of participation. Case discussion classes provide important opportunities to develop strategic skills, and your participation in these will be weighted more heavily. In evaluating your contributions to **case discussions**, I use the following questions:

- (1) Are you a good listener? Do you listen and learn from others in class?
- (2) Have you read and analyzed the case in depth?
- (3) Do you use the case data constructively to analyze the strategic issues and make strategic recommendations?
- (4) Do you use the strategic management concepts and frameworks taught in the course to usefully analyze the case?
- (5) Does your participation fit in with the flow of the class discussion and show that you have been listening and reacting to others' points?
- (6) Do you constructively debate points with other students? Do you provoke a dialogue with other students?
- (7) Do you present useful recommendations justified by your analysis and/or by the class discussion?
- (8) Do you help us to look creatively at strategic problems and solutions?

Throughout the term, I may ask you to submit parts of your case analysis prior to class. I may do this to ensure your understanding of important business analysis tools (e.g. financial ratio analysis, weighted competitive score, competitive map etc.).

I place less value on participation that primarily repeats case facts without analysis or disrupts the flow of the class discussion without reason. Please remember that effective communication is critical in the business world and that, if you have problems communicating (for example, due to shyness), this class provides you with the opportunity to tackle them. Please feel free to discuss any participation concerns with me before it's too late and the semester is ending. I will do my best to assist you.

Please note that it is within my discretion to determine the appropriate participation grade. Sometime around the middle of the term, you will have an option to schedule a meeting with me to assess your progress/obtain feedback on your participation to date.

News discussion (team-based) for bonus points

In addition to participating in case discussions, you will have an opportunity to earn bonus points to your participation grade (up to 2 extra points) through weekly team-based news activity. Each team will be asked to lead at least one brief (5-10 minutes) current news discussion throughout the

term. Your task will be to select a *current* business news article that you think may be interesting to your classmates, and to tie it to a topic discussed in class/analyse the news by using tools and frameworks discussed in the course. These do not have to be formal powerpoint presentations – in fact, you are encouraged to use creativity and have fun during these news segments (feel free to use powerpoint if this is what you prefer). The objectives of the news discussions are:

- (1) To practice application of class concepts to real-world events
- (2) To generate meaningful class discussion
- (3) To get used to working within your group/practice for your major team project
- (4) To practice public speaking/presentation before your major team presentation
- (5) To 'score' decent participation points, which is especially important if you are not a frequent 'talker' in class; here, an excellent news discussion can boost your participation mark

Please note that the news discussion is not optional – you must participate in the news activity in order to pass the participation component of the course. You will be able to sign up for your news presentation as soon as you form your groups.

You can earn between 0 and 2 bonus points for your news discussion, with 0 = no value added, 1 = good, and 2 = excellent. The points awarded are based on the relevance, thoughtfulness and clarity of your content and delivery:

- *Relevance* refers to how well you have thought through your talk, and how well you were able to integrate your examples into the context of the class. Have you applied relevant concepts to your analysis and comments? Have you used relevant examples?
- *Thoughtfulness* refers to your ability to add intellectual value to the class. Have we learned something new and interesting from your news activity? Have your comments highlighted different angles of the issue at hand? Are your insights original and creative? Have you been able to stimulate class discussion?
- *Clarity* refers to your delivery. How clear and persuasively have you presented your ideas? Have you been able to relate your comments to the ongoing dialogue?

Case questions: peer-to-peer assessment and feedback via Mobius SLIP

A significant volume of empirical research demonstrates the benefits of self-assessment and peer-to-peer (P2P) feedback on learning. Self-assessment is a tool that allows learners to reflect on effectiveness of their learning strategies, the extent of their learning, and ways in which learning strategies can be modified for improvement. Recent research shows that targeted self-assessment is one of the most important factors affecting learning.

On the other hand, P2P feedback helps students develop an appreciation of what constitutes high-quality work in a discipline or subject area, and thus facilitates self-assessment. Simultaneously, P2P assignment designs promote students' ability to take an active role in the management of their own learning: that is, you will be able to co-create the learning environment with me and advance your learning more rapidly. Here's how we are going to do it.

Mobius SLIP (mobius.ctasit.com) Mobius Social Learning Information Platform (Mobius SLIP) will be used for administering and processing four written assignments, based on questions on cases that you will be preparing for class discussion. Mobius SLIP is accessible via the D2L course menu.

Throughout the term, there will be four short assignments. Each assignment will constitute a question based on a case that you will be preparing for our class discussion. Each assignment will be facilitated through the web-based Mobius SLIP and will involve peer assessment. In each assignment, you will be randomly matched with a varying group of peers, whose identities you will not know. Scores generated by peer assessment will count towards your grade.

The first assignment will be a practice assignment – that is, your grade will not be included in the final calculation. However, you have to participate in the practice assignment in order to pass this portion of the course.

The documents describing detailed requirements of each assignment are covered in this syllabus and in Mobius SLIP. The Mobius SLIP Student Guide explaining the system's workflow and interface is accessible at the Mobius SLIP site.

Each assignment will consist of three deliverables: **Submissions**, **Reviews** and **Reactions**.

8. For **Submission**, you will submit your answer. You will have to answer a question about a case that you will have prepared for class discussion. Assignment questions for each case will be posted on D2L and on Mobius SLIP sites. Your answer should be maximum two double-spaced pages in length. While this write-up is short, you will have to conduct a full analysis of the case in order to provide a cohesive answer. Your answers will be distributed to a random selection of your fellow students, who will rank and give feedback on your assignments.

9. In **Review**, you will have to review three of your peers' Submissions and write short critiques of them. In addition, you will have to compare the submissions to each to other and to your own, and benchmark them (including your own) in the order of merit. Your critique should be maximum one double-spaced page in length, and you will be providing it after we have discussed the case in class. Giving effective feedback is one of the most difficult parts of working with other people – but, if done well, it is also one of the most valuable. Note that Mobius SLIP review system is actively managed and identifies poor responders, so make sure you take time to be thoughtful and accurate. Reviews may take about one or one

and a half hours to complete.

10. In **Reaction**, you will evaluate Reviews from three of your peers, compare them to each other and to your own reviews, and benchmark them in the order of thoughtfulness, helpfulness, and professionalism. That is, you will give feedback on the quality of feedback, which is known as double-loop learning. Reactions take about half an hour to complete.

Please consult a Case Question Peer-to-Peer Assessment Rubric attached to this course outline for detailed guidance on preparing your submissions and evaluating your peers' submissions and feedback.

Do not show your name anywhere in your Submissions, unless specifically instructed to do so. The peer groups are purposely blind in engagement. Prior to uploading submissions, please remove any information that may identify you as an author from 'file properties'.

You will have to submit all deliverables for each of your four assignments to receive full credit. Since this is a highly simultaneous process, **late deliverables will not be accepted**. If you missed the Submission deliverable, you can still submit Review, but you will not be able to submit Reaction. If you missed Reaction but provided your Submission, your score for Review will be reduced by 50%.

Your total score for the assignment is a sum of the scores for the Submissions and Reviews. Mobius SLIP will generate metrics of student performance. I will monitor your submissions and the scoring process, and adjust scores as necessary.

Deadlines for Submission, Review and Reaction deliverables are scheduled as following:

	Deadline		
	<i>Submission</i>	<i>Review</i>	<i>Reaction</i>
1. Case 2: <i>MMI</i>	Sept 16	Sept 20	Sept 22
2. Case 3: <i>eHarmony</i>	Sept 30	Oct 4	Oct 6
3. Case 4: <i>Coral Divers</i>	Oct 7	Oct 11	Oct 13
4. Case 6: <i>Newell</i>	Nov 4	Nov 8	Nov 10

I will post specific case questions to be answered in your assignments on D2L and on Mobius SLIP, and will also discuss them in class. You will have approximately one to two weeks to complete a full cycle for each assignment. You must upload your submissions, reviews and reactions **before midnight on the specified due date. Please do not work with classmates on any part of this assignment** – it represents individual thinking and effort. Cooperation on individual assignments will be treated as academic misconduct.

The Mobius SLIP Student Guide explaining the system's workflow and interface is accessible at the Mobius SLIP site (www.mobiusslip.com/guide-students.html). Please note that support will be available to help you navigate the system. If you are having problems with uploading your submissions or accessing or interpreting information, please contact **Gillian Ayers** at gillian.ayers@haskayne.ucalgary.ca. However, remember to give yourself sufficient time to complete your uploads, especially initially as you are getting used to the system. Note that deadline extensions are not possible/will not be granted, therefore technical difficulties must be flagged and resolved early.

Individual case assignment

The case study method is widely used in business schools to expose students to complex, real-world problems. During the semester, we discuss a number of strategic management cases. A case is a slice of life. It sets forth, in a factual manner, the circumstances surrounding a particular managerial situation or series of organizational events. Almost always, the case deals with real-life situations; it puts you at the scene of the action and asks you what you would do if confronted with the same circumstances. There is often ambiguous and incomplete information, which could be frustrating. Your task is to determine what the key issues/problems are and then to use whatever information is at hand to suggest how the company may solve those problems.

Your individual case analysis should include a discussion of the key strategic issues facing the firm, an analysis of the external and internal environment, strategic alternatives, final recommendations and suggestions for implementation. Here are some important guidelines for your written case analysis:

- (1) Read the case more than once. Figure out and explain what the most important issues are.
- (2) Do not conduct 'outside' research for the case analysis. Pretend that you are facing exactly the same situation and information presented in the case.
- (3) Conduct a comprehensive analysis of the company's current situation and alternatives. In other words, make sure you consider the key external and internal factors affecting the company (do not leave any critical variables out of the analysis).
- (4) Identify the best alternatives available to the company using the case data, logical reasoning, and creative thinking.
- (5) Define and explain the course of action that you think its managers should follow. (Your conclusions should fit logically with your analysis of the situation.) Explain how the company may implement your strategic suggestions.

Please consult a Case Analysis Grading Rubric attached to this course outline for a detailed description of my expectations.

Length guide for individual case assignment: max. 12 pages (double spaced)

including any appendices (Times New Roman 12 point font, 2.5 cm margins). Please number the pages.

Deadline: Thursday, October 24.

You must submit your assignment via D2L drop box before the ***start of class on the due date***. ***Please do not work with classmates on any part of this assignment*** – it represents individual thinking and effort. Cooperation on individual assignments will be treated as academic misconduct.

**STRATEGIC ASSESSMENT
PROJECT (SAP) – group-
based**

A significant part of the learning experience in the course is the strategic assessment project (SAP), which entails a strategic analysis of a chosen firm conducted by teams of students. It will help you apply your knowledge and skills to an interesting, current strategic situation facing a real-life company. *Seriously consider focusing the project on your current employers, potential (targeted) employers, or some other company closely related to your future professional prospects.* Ideally, you will end the semester with a product of immediate value to yourself and an employer.

Over the next week or so, please form your own teams of **four to five persons per team**. It is best to obtain a balance of specialists within the team (e.g., not all finance majors). I reserve the right to adjust the proposed teams in order to achieve better balance and/or to accommodate those students who have not identified with a particular group. **As soon as you have formed your team, please EMAIL me your list of team members, with your majors and contact information (phone numbers and email addresses).** If you have tried hard but have not succeeded in joining a team by the deadline, email me your major/ contact information and I will assign you to a project team.

Teamwork should be a fun and worthwhile learning experience! Please ensure that you manage the process well. At the first group meeting, it is advisable for each team to identify days and times when all members of the team can meet. If your team has significant issues with one of its members, the whole team should discuss the problem and find possible solutions in a reasonable and professional manner. Continuing problems should be brought to my attention as soon as possible (do NOT wait until the last few days before any project is due).

Your team will identify your chosen company's key strategic issue/s; research its current situation, and present strategic recommendations. The output of this process consists of two parts: a team report and a team presentation.

Team Report

Your team report should follow the guidelines of a written case analysis; that is, it should include a discussion of the key strategic issues facing the firm, an analysis of the external and internal environment, strategic alternatives, final recommendations and suggestions for implementation. Be

sure to link your analysis to the strategic alternatives and recommendations (your analysis should back up your arguments). Avoid loose statements and opinions that are not supported by data and analysis. Financial analysis should be used to support your arguments and recommendations. Although the financial analysis should be discussed in the text, the actual tables or figures can be placed in the appendix (please be sure to reference to the appendix where appropriate so I know where the appendix fits with the text).

All sources must be referenced correctly. This also applies to financial data. The reports should contain a reference list at the end while also citing the specific sources directly in the text.

Paper format: The final report should not exceed 15 double-spaced pages including any appendices (Times New Roman 12 point font, 2.5 cm margins). Please number the pages. Use exhibits judiciously and only to support your analysis in the main paper. Use proper referencing, good grammar and correct spelling. These and the clarity of your writing will be incorporated in your grade.

The report must be written in a professional manner. Other grading criteria include the quality of research, conciseness, cogency of argument, thoughtfulness of discussion, and capturing what is essential to the firm's competitive advantage. All group members will receive the same grade for the written report, unless your team evaluation forms indicate otherwise.

On September 25, all teams are asked to submit a preliminary one to two pages outline of the report, including the company name, the key issue(s) you are planning to investigate, a tentative outline of the report, and a summary of your interim progress to date, if any.

Deadline for group based written report: Tuesday, December 8 via D2L (before midnight) or hard copy via dropbox in SGMA area (4th floor).

Team Presentation

Team presentations are among the most fun aspects of the class! Your group will give a 12 to 15-minute formal presentation of the project (**key issues, analyses, and recommendations**) during the last two weeks of the semester. The presentation will be followed by a brief question and discussion session with the class. The content of your presentation will closely reflect the written team project: the presentation should summarize your written report, highlight key issues, main findings in your strategic analysis, strategic alternatives that you have considered, and your final recommendation. *I encourage you to use creativity to make the presentation lively and interesting – videos, skits, role-plays, and props are examples of useful additions.*

The team presentations will be **professional presentations**. Tips: (a) dress

professionally, (b) use visual aids such as overheads, (c) speak clearly and professionally, (d) be prepared for questions, and (e) do not exceed the time allotted to your team. Note: every member of the team is expected to participate in the presentation. However, different team members may receive different grades for the presentation portion of SAP, depending on the quality of content and delivery.

Peer evaluations

You have the opportunity to rate team members' contributions through an end-of-semester confidential peer evaluation. A copy of the peer evaluation is attached to this syllabus, and will be posted online. Note that the peer evaluation does not substitute for taking timely and proactive steps concerning non-performing team members. **I take peer evaluations very seriously - they may result in lower (including failing) or higher grades for individuals who received ratings different from other members of the group.** Further, if a student allows his/her name to stand on group work when there was no real contribution, then that student is guilty of *academic misconduct*.

Expectation of quality of work

Students sometimes argue that there cannot be any right answers in strategy, or that everyone's answer should be equally 'correct'. This perspective is not valid. If this perspective were valid, then every strategy would be equally good in achieving results, and there would be no performance differences between firms. However, it should be noted that, as there are many different good strategies, there are many different good answers. Since in this course answers cannot be placed in a reality test, the students must rely on other evaluation criteria that are good predictors of the effectiveness of an analysis:

1. Take a clear stand or position (e.g., on a firm's strategy, source(s) of competitive advantage, recommended course of action). Strategic decisions cannot be made by being wishy-washy and without committing to a position.
2. Argue persuasively for a strategic position. This means the following:
 - ✓ Answers are substantiated with evidence. Arbitrary assertions that are not backed up do not persuade.
 - ✓ Answers are thorough: all the relevant evidence, including financial information, is considered (and not only that which happens to support your position).
 - ✓ Answers are balanced. While it is necessary to take a position, you also need to show that you have considered all the relevant evidence and different alternatives.
 - ✓ Answers are logical. You need to convincingly explain why one problem is more important than other, why one alternative is better than other, why you recommend

something. This can often be accomplished by showing what principles apply and how.

3. Presentations (oral or written) of answers are clear, concise and convincing (see bullets above), and incorporate good grammar.

Grade Scale

The Haskayne School of Business endeavours to ensure consistency of final grades across courses and sections. Variations in distribution will always be considered by the instructor where called for by the performance in each individual class. The student does not have any 'right' to a certain grade, but is responsible for earning grades. The instructor has unfettered discretion to evaluate student performance and assign all grades.

%	Letter	Approximate distribution
98.00-100	A+	10%
94.00-97.99	A	
90.00-93.99	A-	25%
86.00-89.99	B+	30%
82.00-85.99	B	25%
78.00-81.99	B-	10%
74.00-77.99	C+	
70.00-73.99	C	
66.00-69.99	C-	
62.00-65.99	D+	
58.00-61.99	D	
<58	F	

Emergency Evacuation Plan

In the event of an emergency, the building must be evacuated and all individuals are to meet at a predetermined location. Additional information on the emergency procedures and the list of rendezvous points can be found here <http://www.ucalgary.ca/emergencyplan/assemblypoints>.

University Regulations

Academic Accommodation:

The University of Calgary is committed to ensuring that each student is afforded an academic environment that has been developed on the principles of equal and equitable access, respect for individual differences, and academic integrity. **Student Accessibility Services (SAS)** offers services to students with documented disabilities including learning disabilities, chronic health issues, hearing and visual impairment, disabilities and temporary impairment due to accident, illness or injury. It is the student's responsibility to contact Student Accessibility Services to request academic accommodation. The nature and type of academic accommodations vary from student to student and are dependent upon the student's disability and the academic requirements.

If you are a student with a documented disability who may require academic accommodation and have not registered with Student Accessibility Services, please contact their office at 403.220.8237. Students who have not registered with Student Accessibility Services are not eligible for formal academic accommodation. Students are also required to discuss needs for accommodation with the instructor no later than fourteen (14) days after the start of this course.

<http://www.ucalgary.ca/access>

Accommodations on Protected Grounds other than Disability:

Students who require an accommodation in relation to their coursework or to fulfil requirements for a graduate/undergraduate degree, based on a protected ground other than disability, should communicate this need, preferably in writing, to their Instructor or to the Associate Dean, AD MBA Program or AD Undergraduate Program. Students who require an accommodation unrelated to their coursework or the requirements for a graduate degree, based on a protected ground other than disability, should communicate this need, preferably in writing, to the Vice-Provost (Student Experience).

Academic Honesty:

Academic honesty is the cornerstone in the development of knowledge. A single offence of cheating, plagiarism or other academic misconduct on term work, tests or final examinations or assignments can lead to disciplinary probation, suspension or expulsion from the Faculty by the Dean. If a student allows his/her name to stand on group work when in fact there is essentially no contribution made, then that student is guilty of academic misconduct. Please refer to the current University Calendar for further details.

Plagiarism:

Plagiarism involves submitting or presenting work as if it were the student's own work when it is not. Any ideas or materials taken from another source written, electronic, or oral must be fully and formally acknowledged. Plagiarism includes but is not limited to:

- (a) The work submitted or presented was done, in whole or in part, by an individual other than the one submitting or presenting the work (this includes having another impersonate the student or otherwise substituting the work of another for one's own in an examination or test),
- (b) Parts of the work are taken from another source without reference to the original author,
- (c) The whole work (e.g., an essay) is copied from another source, and/or,
- (d) A student submits or presents work in one course which has also been submitted in another course (although it may be completely original with that student) without the knowledge of or prior agreement of the instructor involved.

While it is recognized that scholarly work often involves reference to the ideas, data and conclusions of other scholars, intellectual honesty requires that such references be explicitly and clearly noted. Plagiarism is an extremely serious academic offence.

It is recognized that clause (d) does not prevent a graduate student incorporating work previously done by him or her in a thesis or dissertation.

Software Policy:

Faculty, students and staff of the University of Calgary are expected to use software in a lawful manner in accordance with the Canadian law of copyright and the software's specific license conditions.

Copyright and Photocopying:

All material used in this course is for the sole use of the individual and should not be recopied either in print or digital format. For copyright guidelines and University of Calgary policies please visit: <http://library.ucalgary.ca/copyright>. All copyright related questions can be directed to the Copyright Office: copyright@ucalgary.ca.

Recording Lectures:

Recording of lectures and labs is permitted for individual private study, only at the discretion of the instructor. Any other use of recording constitutes Academic Misconduct and may result in suspension or expulsion. Both the student and the instructor must sign the appropriate Release Form to facilitate recording lectures or labs.

Other Information

Counselling and Student Development Centre:

The Counselling Centre focuses on three major areas: personal counselling, career development and academic success. Should you require assistance, please phone 220-5893 or review the website at: <http://www.ucalgary.ca/counselling/>

Student Accessibility Services (SAS)

Student Accessibility Services exists to create an accessible and inclusive educational environment for those students with permanent disabilities or temporary impairments. <http://www.ucalgary.ca/access>

Students' Union Representative:

Email: haskayne1@su.ucalgary.ca
haskayne2@su.ucalgary.ca

Freedom of Information and Protection of Privacy Act:

For information on the Freedom of Information and Protection of Privacy Act please visit <http://www.ucalgary.ca/secretariat/privacy>

Safe Walk:

<http://www.ucalgary.ca/security/safewalk>

Office of the Ombudsperson:

The Student Ombuds Office offers a safe place for undergraduate and graduate students to discuss student related issues, interpersonal conflict, academic and non-academic concerns, and many other problems. Operated independently of the University of Calgary, the Ombuds Office is confidential, impartial, and informal. The Ombuds Office is a great resource for students to voice concerns and learn about the possible courses of action to take. More information can be found at <http://ucalgary.ca/ombuds>

Haskayne Undergraduate Statement of Student Responsibility

RESPONSIBILITY is:

Respect for **E**veryone I care about, impact and represent, **S**o I make a **P**ositive impact **O**n my **N**eighbors, peers, colleagues, and family. **S**taying responsible **I**s what keeps me grounded **B**y reminding me the way **I** Live is **I**nfluenced by **T**he actions of others; my actions impact **Y**ou – today and in the future.

As a Haskayne School of Business Student:

- When faced with tough choices, I have a responsibility to ensure that alternatives are explored, their consequences understood, and priorities are set based on ethical values so that “win-win” solutions are possible.
- I am accountable for my actions and responsible for their consequences – both in the short and long term.
- I will be consistent in my actions, words, and intentions so they reflect commitment to my ethical and responsible core values.
- I can play a role in respectfully raising awareness among others and encouraging my peers and colleagues to find positive solutions to ethical challenges.
- I will develop and sustain lasting relationships through open and honest communication, and demonstrating personal integrity.
- I have the responsibility to strive for a career and life that embody my passions and reflect my sound values while living to an ethical standard.
- It is my responsibility as a student to develop to my full potential and in turn make a positive contribution to the world around me. It is my social responsibility to help my fellow students, coworkers, and members of the community at large to fully realize their potential as well.
- I am responsible for shaping a positive world for future generations, including the management of my own ecological footprint and respect for the environment in my decisions and actions.
- I have a responsibility to embrace, encourage, and sincerely accept diversity. Diversity of opinion, background, and belief is a competitive advantage and helps build a positive future.

My ethics become “real” when I choose to live my life in a way that is true to my core values. It is my responsibility to live ethically – no one can do it for me.

This statement was created with the input of over 400 Haskayne undergraduate students in the 2008 – 2009 academic year. It was officially unveiled March 20, 2009 at the Corporate Social Responsibility and Sustainable Development Program conference on Corporate Tools. This statement applies to add undergraduate students at the Haskayne School of Business, University of Calgary.

Class Schedule & Topics

Important dates (e.g. Block Week, Lecture start dates, Reading Week, etc.) can be found at the following web site: <http://ucalgary.ca/pubs/calendar/current/academic-schedule.html>

COURSE SCHEDULE SGMA 591 L03 Fall 2014			
SESSION	DATE	TOPIC/DETAILS	READINGS/PREP
Session 1	Sept 8	Course introduction and overview What is strategy?	Chapter 1
Session 2	Sept 10	Vision, objectives, and strategy Levels of strategy and measuring performance	Chapter 1 <u>Case 1</u> : Newfoundland Centre for the Arts (see assignment questions on D2L)
Session 3	Sept 15	External strategic analysis: Macro environment	Chapter 2
Session 4	Sept 17	External strategic analysis: Industry analysis First Mobius assignment (practice assignment) due the day before class. See D2L for assignment questions	Chapter 2 <u>Case 2</u> : Car2go
Session 5	Sept 22	Internal strategic analysis: Resources and capabilities	Chapter 3 Bruns, 'Introduction to financial statements and financial ratios analysis' (in your case pack) <i>Please see D2L for SAP project outline and tips for issue identification</i>
Session 6	Sept 29	Internal strategic analysis: Competitive strategies and competitive positioning	Chapter 4
Session 7	Oct 1	Competitive strategies (continued) Second Mobius assignment due the day before class	<u>Case 3</u> : eHarmony
Session 8	Oct 6	Academic writing – walking the fine line of proper referencing and plagiarism in group projects Working with online information sources	Guest speaker: Justine Wheeler, Director, Business Library See reading assignments for Session 9
Session 9	Oct 8	Pulling it all together: The big picture Third Mobius assignment due the day before class	Review Chapters 1-4 <u>Case 4</u> : Coral Divers Resort
Session 10	Oct 13	Ethics, social responsibility and environmental sustainability	Chapter 5 Guest speaker TBD
Session 11	Oct 15	Business strategies in different contexts	Chapter 5 Video case in class
Session 12	Oct 20	Strategy implementation	Chapter 9 Guest speaker TBD

Session 13	Oct 22	Management of innovation Individual case assignment due before class	Chapter 6
Session 14	Oct 27	Case assignment review Course Q&A	Guest speaker
Session 15	Oct 29	International strategies	Chapter 8
Session 16	Nov 3	International strategies	Chapter 8 <u>Case 5</u> : Closing case in Chapter 8 – Sharp case, p. 304
Session 17	Nov 5	Corporate strategy and diversification Fourth Mobius assignment due the day before class	Chapter 7 <u>Case 6</u> : Newell Company
Session 18	Nov 10	Diversification (continued)	Chapters 7, 10
	Nov 12	Reading day – no class	
Session 19	Nov 17	Strategy Assessment Project group presentations	Please review HSB oral communication rubric (attached to this course outline)
Session 20	Nov 19	Strategy Assessment Project group presentations	
Session 21	Nov 24	Strategy Assessment Project group presentations	
Session 22	Nov 26	Strategy Assessment Project group presentations	
Session 23	Dec 1	Group work – SAP report	
Session 24	Dec 3	Group work – SAP report	
Session 25	Dec 8	Course review SAP Q&A	Review chapters 1-10 Please prepare any questions you might have on your SAP project
SAP written report due Dec 8th by 11.59 pm. via D2L Team evaluations due Dec 8th by 11.59 p.m. via D2L			

Please note: At the University of Calgary, feedback provided by students through the Universal Student Ratings of Instruction (USRI) survey provides valuable information to help with evaluating instruction, enhancing learning and teaching, and selecting courses. Typically these surveys are done either in class or online during the last two weeks of classes. Your responses make a difference – please participate in the USRI surveys. For more information, please visit <http://ucalgary.ca/usri>.

Appendix 1: SGMA591 Detailed Course Outcomes

1. Each student will communicate effectively.

- I. Students will present ideas in a logical and organized way in written work.
- II. Students will use appropriate diction and structure in written work.
- III. Students will follow the conventions of spelling and grammar in written work.
- IV. Students will fully develop ideas and provide appropriate evidence to support their ideas in written work.
- V. Students will create written materials that are suitable for purpose and audience.

2. Each student will be skilled in critical thinking and decision-making.

- I. Students will identify and summarize business problems.
- II. Students will be able to identify and apply the appropriate analytic framework.
- III. Students will be able to identify key assumptions.
- IV. Students will be able to evaluate the quality of evidence.
- V. Students will be able to predict conclusions/implications and anticipate consequences of business decisions.

3. Each student will have a breadth of understanding of key business functional area concepts and apply theories appropriately.

Students will identify and assess strategies to create value:

- I. Students will be able to identify current or potential strategy.
- II. Students will be able to identify criteria for creating value and evaluate alternatives against these criteria.
- III. Students will be able to choose a strategic action or recommend an alternative, recognizing implementation issues.

Appendix 2: SGMA Grading Rubrics

Individual Case Analysis Grading Rubric

Trait	Expectations
Completeness	<p>All key parts of case analysis are included:</p> <ul style="list-style-type: none"> • Set-up/introduction • External analysis <ul style="list-style-type: none"> ○ Macro-environment (PEST) ○ Industry (5 forces, driving forces, KSF, competitive map or analysis) • Internal analysis <ul style="list-style-type: none"> ○ Financial ○ SWOT ○ Competitive strategy (should include ID of a generic comp. strategy and sources of comp. advantage) • Issue identification • Recommendations/alternatives • Suggestions for implementation
Logic/ Connectedness	<p>No logical gaps No inconsistencies/contradictions Each analysis has a logical conclusion All parts of the analysis are logically connected Recommendations logically flow from analysis</p>
Thoroughness/depth	<p>Assumptions are clearly stated Conclusions are backed by analysis No unsupported personal opinions Alternative impacts/sides of arguments are considered Nuances of issues are acknowledged Recommendations are specific and actionable</p>
Insight	<p>Original insights are demonstrated (not simple regurgitation of textbook/lecture material) Creative</p>
Presentation	<p>Grammar is decent Paper is well organized/easy to follow Presentation is professional Guidelines are adhered to</p>

Some additional considerations:

Additional research (outside of the case information) is NOT required for this assignment. While students are not penalized for using additional sources, they also do not get rewarded for it. If additional sources are used (despite my repeated requests to NOT conduct outside research), they should be properly referenced.

Some case issues are subject to judgment, e.g., threat of new entry may be interpreted as low or high depending on how students assess capital requirements for starting a new business in the industry. If

there is no detailed information in the case, I may accept a variety of answers, as long as assumptions are clearly stated, and the conclusion is backed up by solid arguments.

Some common mistake/omissions/deficiencies:

- Analysis is “choppy”: specific analyses do not have conclusions and are not logically connected to each other and to issues and recommendations
- Key success factors are analyzed as part of internal analysis (e.g. “Netflix’ KSF are....)
- 5 forces analysis is centered on the firm: competitive situation is confused with the outcome of competition
- Issue identification is missing
- Recommendations do not address every issue mentioned
- Unsubstantiated personal opinions are used as a basis for recommendations
- Recommendations are centered on non-strategic (operational) issues
- Statements are generic, e.g.:
 - *“Social forces are an important change driver in this industry”* [with no follow-up explanation]
 - *“Apple should form a partnership with another company in order to strengthen its competitive position”*
- Financial analysis is disconnected from the rest of the paper
- Financial analysis is too shallow (no important ratios analyzed, no YOY comparison, no comparison to competition)

I value recommendations the most. If recommendations are outstanding, I may “forgive” certain (non-critical) deficiencies in analysis. By “outstanding” recommendations, I mean recommendations that are creative, specific, rooted in course material, connected to analysis and issues, expansive, and thought through from all possible angles (e.g. risks and trade-offs are considered).

Case Question Peer-to-Peer Assessment Rubric

Assessment of ‘Submissions’:

Please use this rubric for the “Submission” and “Review” parts of your Mobius SLIP assignment, i.e. to guide you in 1) preparing your own answers; and 2) critiquing and ranking your peers’ answers to the posed case questions.

Trait	Expectations
Preparation	It is evident that the student has read and analysed the case
Completeness and relevance	The question is answered Relevant course concepts are used in answering the question Relevant case information is used
Logic/ Connectedness	No logical gaps No inconsistencies/contradictions Recommendations (if any) logically flow from analysis
Thoroughness/ depth	Assumptions are clearly stated Conclusions are backed by analysis No unsupported personal opinions Alternative impacts/sides of arguments are considered Nuances of issues are acknowledged Recommendations are specific and actionable
Insight	Original insights are demonstrated (not simple regurgitation of textbook/lecture material) Creative
Presentation	Grammar is decent, no spelling mistakes Presentation is professional Guidelines (i.e. length/formatting) are adhered to

Please note that depending on a particular question, some of the expectations listed above may not be applicable. The write-ups you are submitting and critiquing are rather short, therefore you should be focusing predominantly on substance and relevant insight. Note also that your conclusions may be different from those of your peers, however, your peers’ position may be convincingly argued and substantiated, and therefore may warrant a high rank. You may state (and substantiate) your disagreement in your feedback write-up.

Assessment of 'Reviews':

Please use this rubric for the "Reaction" part of your Mobius SLIP assignment, i.e. to guide you in evaluating and ranking the quality of feedback you have received from your peers. Please rank your peers' reviews according to the following criteria.

Trait	Expectations
Thoughtfulness	It is evident that the reviewer has read, analysed and understood (or tried to understand) your answer Comments are relevant and insightful, and tie your analysis to class material
Helpfulness	The feedback has helped you see different sides/angles of the issue You have learned something from this critique, and it will help you improve your analysis in the future
Professionalism	The feedback is constructive and polite The feedback is professionally presented (in terms of grammar, language, structure etc.)

Appendix 3: Assurance of Learning Rubrics

HSB Business Analysis Rubric

Date: _____ **Rater:** _____ **Course:** _____

Student: _____

TRAIT	Unacceptable	Acceptable	Exemplary	Score
Identifies and Summarizes problem at issue	Does not identify and summarize the problem, is confused or identifies a different or inappropriate problem	Identifies the main problem and subsidiary, embedded, or implicit aspects of the problem	Identifies not only the basics of the issue, but recognizes nuances of the issue, i.e. multidisciplinary aspects of the problem	
Analytic perspectives	Fails to identify the appropriate analytical framework ; uses a framework incorrectly, uses it to incomplete effect; or use includes errors or omissions	Identifies the appropriate framework, uses it in context but may not recognize or identify complexities	Identifies the appropriate framework ; uses it in an optimal fashion and context, recognizes complexities	
Key assumptions	Identifies none or very few of the assumptions that underlie the issue	Identifies some of the key assumptions and issues	Identifies and questions the validity of the key assumptions that underlie the issue	
Quality of evidence	Merely repeats information provided, taking it as truth or denies evidence without adequate justification	Examines the evidence and source of evidence, questions its accuracy, precision, relevance, and completeness	Observes cause and effect and addresses existing or potential consequences. Clearly distinguishes between fact, opinion, and acknowledges value judgments	
Conclusions, implications, and consequences	Conclusions, implications, and consequences unsupported, incomplete or not relevant	Conclusions, implications, and consequences follow logically from analysis.	Conclusions, implications, and consequences follow logically from analysis plus able to make recommendations based on interrelated consequences that follow from all elements of the problem	

HSB External Business Environment Perspective Rubric

Date: _____ Rater: _____ Course: _____

Student: _____

TRAIT	Unacceptable	Acceptable	Exemplary	Score
Identification of External Factors	No or incomplete identification of the relevant external factors: economic, cultural, legal, demographic, etc.	Some identification of most of the relevant factors	Clear and detailed identification of relevant factors	
Analysis of External Factors	No or weak analysis of impact of relevant external issues; erroneous or inaccurate analysis of impact	Some analysis of impact of external factors	Clear, accurate and somewhat detailed analysis of impact of relevant external factors	
Application of Analysis to Management Situation	No or little application of analysis to specific management situation; incorrect or weak conclusions or recommendations made	Some application of analysis to specific management situation; some conclusions or recommendations made	Clear application of analysis to specific management situation; valid conclusions and good recommendations given	

HSB Oral Communication Rubric

Date: _____ Rater: _____ Course: _____

Student: _____

TRAIT	Unacceptable	Acceptable	Exemplary
Organization	The student communicates with little or no cohesion during the presentation. The student has little or no ability to communicate relationship to overall presentation goals.	The student has basic structure and opening statement relevant to the topic and overall presentation goals. The student gives outline of speech. The student is mostly organized and focused throughout.	The student has a clear opening statement that catches audience's interest and maintains a well organized structure throughout the presentation. The student stays focused throughout the presentation.
Content	The student does not meet assignment requirements; the presentation content is not current, nor objective.	The content presented fulfills assignment requirements. The student uses appropriate sources and is objective.	The student is more thorough than "average" in fulfilling assignment requirements. Research goes beyond minimum requirements.
Transitions	The student provides no or inadequate transition to the following speaker. No connection made between sections of the presentation	The student provides basic transition to the next speaker. The student may introduce next speaker's name but not the topic of that speaker.	The student provides a clear transition to the next speaker. Introduces the name and topic covered by the subsequent speaker.
Voice quality and pace	Demonstrates one or more of the following: mumbling; hard-to-understand English; voice that is too soft, too loud, too fast, too slow.	Easy to understand the student; the student demonstrates appropriate pace and volume.	Excellent delivery. The student modulates voice, projects enthusiasm, interest, confidence.
Mannerisms	Demonstrates one or more distracting mannerisms, which may include bad posture.	The student demonstrates no distracting mannerisms. The student has decent posture.	Uses body language effectively to maintain audience's interest.
Use of media	The student relies heavily on slides or notes. Makes little eye contact. Some key points may not have a corresponding slide.	The student looks at slides to keep on track with presentation. The student has an appropriate number of slides and non-distracting slide content.	Slides are used effortlessly to enhance speech.
Quality of conclusion	Conclusion is missing or poor, not tied to analysis. Does not summarize points that brought the speaker to this conclusion.	Conclusion is adequate. Summarizes presentation's main points, and draws conclusions based upon these points.	Goes beyond "average" in delivering a conclusion that is very well documented and persuasive. Covers all key points previously discussed.

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SGMA 591-L03, Fall 2014 – PEER EVALUATION

PURPOSE: To assist instructors in determining the "team component" of each individual's grade as fairly as possible.

ASSUMPTION: When a team member, has in total, contributed to the overall work of the team about the average as the average team member, he/she should receive 100% of the "overall team grade" for the team component of the course.
When a member has contributed more than the average to the work of the team (e.g. analytical, organizational, written, investigative, verbal) he/she should receive more than 100% of the team grade (e.g. 110%, 120%, etc.)
Similarly, when a member has contributed less than average, he/she should receive less than 100% of the team grade (e.g. 90%, 80%, etc.)

NOTE: IT IS NOT NECESSARY THAT THE GROUP AVERAGE 100% FOR THE PEER EVALUATIONS. THUS, ONE STUDENT MIGHT DESERVE 115% AND THE OTHERS DESERVE 100%.

INSTRUCTIONS: Please list below the members of your team and indicate what percentage of the team grade you would recommend each other member receive.

	<u>NAME</u>	<u>PERCENTAGE</u>
1. (YOURSELF)	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

EXPLANATION/COMMENTS: (If needed, please use other side to expand on your comments.)

Please refrain from showing or discussing your evaluation with anyone. Please submit this form by December 8, 2015 via email.