Course outline

Instructor: Jean-Marie Nkongolo-Bakenda, Ph.D.
Time: 5:30-6:45 PM Monday and Wednesday (Ed. 621)
Office: Education Building 512.6.
Office hours: 10:00-12:00 Monday or on appointment
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Fax: 585-5361 E-mail: Jean-Marie.Nkongolo-Bakenda@uregina.ca (Use this address if you have a question needing a quick response). (To submit assignments, use the UR Courses address from the course website)
Course site: see your UR Courses account on www.uregina.ca

1. COURSE DESCRIPTION AND OBJECTIVES

The Business Strategy course covers the Strategic Management matters despite its restrictive title. It is designed to allow you to determine the direction of any organization and undertake actions that might influence its competitive position in the marketplace. The purpose is to equip you with a systematic process to formulate, implement, control, and evaluate the strategies and policies necessary to improve the organisation's long-term prosperity in a global, changing, and highly competitive environment.

Strategic management is an integrative capstone course that will provide you with the opportunity to integrate concepts, tools, and approaches from other previous functional-oriented business courses as well as from your experience in business and organizations. In this course, the strategic management process is seized in a perspective that reconciles the positioning stream, the resource-based view, the learning process considerations, and the development of dynamic capability requirements. So, the emphasis will be put on the organisation's competitive position building within the industry as well as on the acquisition, maintenance, and development of resources and capability to face the challenges in the business environment.

At the end of this course, you should be able to:
- describe the process of a successful strategic management;
- analyse the competitive forces in an industry or an organization’s sector of activities;
- assess current resources and capabilities of an organisation;
- diagnose the strategic posture of an organization;
- communicate an appreciation of the synergy that can be created by managing the interdependencies between functional areas of the organization;
- discuss the various ways an organization can improve its resources and build its competitive advantages in domestic and global marketplace;
- formulate a strategy for an organization at a corporate, business, and functional levels;
- implement a strategy, namely, by designing the appropriate organization structure and processes, and allocating necessary resources and time;
- Control the appropriateness of an implementation and evaluate results of a strategy.

2. METHODOLOGY
Classes will consist of lectures, case analyses, exercises, and discussions. You are encouraged to question, comment, and give alternative viewpoints. The suggested textbook and material will help you to begin this thinking. The purpose of the classes is to elaborate and reinforce the designated textbook and other material. For this reason, the material identified in the schedule will be covered relatively quickly, allowing more time for additional information, examples and discussion. Therefore, it is important that you complete the assigned readings before class. Please get more information on the UR course website (each student has his/her personal account). Note that a case”Papa John’s International” will be used in class. You are therefore invited to have a copy of this case handy and to read it before classes (see the UR Courses). It will allow, if possible, applying frameworks and concepts of each theme scheduled. Slides or reports on cases “The Global Automobile Industry”, “General Motors”, and “Maytag” analyzed during previous semesters are available on UR courses.

3. TEXTBOOKS AND SUPPLEMENTARY MATERIAL
Required Textbooks:

Chosen Cases in Strategic Management. From Ivey Website. (See the Faculty for the cost that you must pay for)

Handouts, Readings, and PowerPoint slides on the course site

Suggested References:

www.smsweb.org/
4. GRADING

<table>
<thead>
<tr>
<th>Group Work</th>
<th>Individual Work</th>
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<tbody>
<tr>
<td>Case analysis and presentation (1)</td>
<td>Write-ups (6 best of 8)</td>
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<tr>
<td>Written case analysis (1)</td>
<td>Quizzes (3)</td>
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<td>Final exam</td>
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<td>Attendance and participation</td>
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5. ASSIGNMENT AND EXAM REQUIREMENTS

Case analysis and presentation:
The class will be organized into 9 teams maximum (the number of students per team will be determined by the instructor depending on the number of students taking the course this semester) to carry out one case analysis according to the schedule. In forming these teams, please consider both the expertise of each of the team members across functional areas (i.e., marketing, finance, accounting, HR etc.) and the scheduling flexibility (i.e., ability of team members to meet out of class). Each team will analyse and make a presentation of one case (from the list on the schedule) during the semester. The case presentation will be worth 15% of the mark. It must be chosen and presented for classes according to the schedule.

The presentation will be evaluated for the dress and manner, the speaking style, the organization and presentation of pertinent facts (dealt with challenges and problems, correctly identified key case problems in relation with theory, distinguished between symptoms, facts, opinions, own inferences and underlying problems or causes), the quality of visual support, and the interaction leading. The objective of the exercise is to present pertinent material analysis related to the case in the way that enables other students, first, to "size up the situation described in the case and to think through what, if any, actions need to be taken"; second, to discuss and relate the case to the theory as scheduled during the week and the weeks preceding the day of the presentation; and third, to defend one’s position according to related theory and facts. The interaction of the participants should lead to decisions, maybe different from yours, based on the combined intelligence of the class. Slides used will be submitted in electronic and hard copy format prior to the presentation.

At the end of each presentation, the class and I will use the form attached to this syllabus to rate your presentation. The class's average rating will then be averaged (fifty, fifty) with my rating to determine the quality of your presentation. If I have the impression that a student assessment is done with an excessive leniency or severity, I may exclude this assessment before calculating the average. A student whose assessment is excluded two times will be penalized for his/her poor participation as indicated below.
Written case analysis:
Each team will analyse the case “Tesla Inc.: The Strategic Partnership for a New Gigafactory in China” during the semester and present the final written report at the end of the semester (see the schedule). I expect a written report of 10 one and half-spaced typed pages (exhibits excluded) and prepared in the format recommended in Turabian, Kate L. A Manual for Writers of Term Papers, Theses, and Dissertations. Sixth edition. University of Chicago Press. Chicago. 1996 (Library: LB 2369 T8 1996). Each written report is to be composed of the following sections:
- Title page;
- Table of contents;
- Executive summary (1 page: not to be confused with the introduction)
- Introduction
- Analysis of the external environment (PEST, Stage of development, Strategic group)
- Analysis of the internal environment (Value chain & core competences)
- SWOT Matrix and appropriate strategic actions;
- Assessment of the current mission, vision, objectives, strategies, and corporate governance;
- Strategic alternatives (Corporate, competitive, functional, if necessary with respect to SWOT results, portfolio grid, stage of development, position in the industry, competition, etc.);
- Implementation plan: No changes scenario (stability) or recommended changes with detailed required resources, timeframe and action plan)
- Conclusion summarizing the key results you have reached.
- References & Exhibits

Written case report must be submitted (electronic and hard copy format) at the date indicated on the schedule. It is worth 20% of the mark. It will be evaluated for the Format (appearance, aspects covered, English, etc.), the research done (amount and quality of data collected), and the analysis (identification and presentation of pertinent facts and factors, your interpretation of the material in the case, how you relate them to theory, your conclusions).

The written report is due at the beginning of class on the day it is due (i.e., the day they appear in the class schedule). Late submission will not normally be accepted without penalty. Penalty for late assignments can be worth from 10% to 100% of the mark depending on the importance of the lateness.

Generally, it works like this. Late written report in reasonable deadline is graded, just like other assignments, and then a penalty is assessed. The penalty is 10% per day. Papers more than 10 days late will be assigned zero.

Of course, report that is not due on the day that you have an excused absence is not penalized. However, it must be due the day you return to class.
Case Write-Ups
There will be 9 case discussions during the semester. For each case, except the day your group is presenting, you are required to submit a one page, one and half spaced typed business report, outlining your response to a specific question or set of questions (Only your six best marks will be included in the grade calculation). The questions to be addressed will be posted on the course site (UR Courses). Note that these questions are only intended to help you focusing on a specific part of the course when analysing the situation in the case.

Each case memo is worth 3.5% of the mark (21:6) and will be evaluated on both content and format. Note that a student who will miss to submit a write-up will receive zero for that write-up. Each write-up is due before 8:30 a.m. the day of the session. No late submissions will be accepted. The write-up must be sent as an attachment by e-mail through the UR Courses Website. The name of the file and the subject of the message must include: your first name+ the first letter of your last name + name of the case. It is highly recommended to save the file as an rtf (rich text format) document. Important note: this assignment is individual and should not be done in group (see last point of 5.13.2.2 Violation – Acts of misconduct).

Quizzes:
Three non-cumulative (covering only the part identified on the schedule) quizzes will be given to test your knowledge of information you are reading. Each quiz will consist of multiple choice, true and false or essay questions. Each quiz of no more than 20 questions will be approximately 20 minutes in length at the end of the class at the date indicated on the schedule. The three quizzes will be worth 14% of the mark.

Final exam (Open book, except for communication devices):
The final exam is cumulative (covering material seen during the semester) and will be three hours in length on the date scheduled by the Faculty. It will consist of a case study. The final exam will be worth 20% of the mark.

Attendance and class participation:
It is expected that students will attend be prepared for all classes. Attendance and participation are worth 10% of the mark. Each student should have a name card in front of him/her to facilitate interactions. Students should be ready to discuss material related to assignments and case studies. They should also be prepared to answer to review questions if necessary. Each student will at least read the cases scheduled to be handled during the class period and be ready to carry out related analysis. During the class, students are expected to share concepts, information, experiences etc. It seems important to point out as stated by Robbins and Langton (1999) that participation can be and is:
- providing recapitulations and summaries;
- making observations that integrate concepts and theories;
- citing relevant personal examples;
- asking key questions that lead to revealing discussions;
- engaging in devil's advocacy;
- disagreeing with the instructor or the group when the difference of opinion serves as both counterpoint and a way of exploring all sides of a concept, theory, issue or practice;
- being an active participant in group discussion;
- working with others to come to a common understanding of topics.

Furthermore, you should avoid continuously dominating class and group discussion. You should also listen to what others say. Come to class well prepared and equipped to intelligently discuss the topic of the day. Do not be a warm body in the classroom whose mind is pre-occupied with other critical issues than the matter of the course.

Class participation is an important part of the learning process in this course. You should be able to demonstrate knowledge of the readings, make thoughtful comments, and challenge the literature, the instructor, or fellow students. While your voluntary participation is highly encouraged, you should be prepared to respond when called upon to give your opinion on specific issues.

Note on the group work: The objective of a group work is to initiate each student to teamwork practice that is nowadays a requirement to success in the marketplace. An effective teamwork member needs to have a higher level of willingness to carry out the work dedicated to one’s group, cooperate with other members, and build trust that leads to leaning on each other effort. Generally we give the same mark to team mates to recognize this work sharing.

But if the team members feel that each member did not bring to the group the effort required, they do request a special treatment for each member. This behaviour is consistent with what can happen in the marketplace where a member can be excluded from a group if he/she does not contribute adequately to the achievement of group objectives. Following a request, different solutions can be applied: peer evaluation or, even, exclusion. In the case of a peer evaluation, the group mark will be assigned to each team member according to his/her contribution.

6. PLAGIARISMS AND LANGUAGE POLICY
You may lose part or all of the term marks for this course if you are found guilty of plagiarism. Will be considered as plagiarism the submission of work that is not your own without citation and the submission of work generated for another course without prior clearance by the instructor of this course.

Language used must be inclusive with regard to human beings (she/he, s/he or one).

7. STUDENTS WITH SPECIAL NEEDS
If there is any student in this course who, because of a disability, may have a need for accommodations, please come and discuss this with me, as well as contacting the Coordinator of Special Needs Services at 585-4631.

If you require exam space or use of adapted equipment for exams, I (not you) must contact the Special Needs Office for availability and booking.
## 8. CASE FOR WRITTEN ANALYSIS

1. Tesla Inc.

## 9. SCHEDULE

<table>
<thead>
<tr>
<th>Dates</th>
<th>Reading Assignments/Topics</th>
<th>Cases and quizzes</th>
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<tbody>
<tr>
<td>Sept. 4</td>
<td>Introduction: course outline, expectations, Case Analysis&quot;</td>
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<tr>
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<td>See textbook’s Appendix AP-1 to AP-32</td>
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<td>Sept. 9</td>
<td>Theme 1: Strategic Management: an Overview</td>
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<td>Chapter 1 - pp. 1-28</td>
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<td>Sept. 11</td>
<td>Theme 1: Strategic Management: an Overview (continued)</td>
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<td>Chapter 1 - pp. 1-28</td>
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<td>Sept. 16</td>
<td>Theme 2: Analysis of the External Environment of the Firm: Assessing the General and Competitive Environments Chapter 2: pp. 29-63 Please read in advance the “Papa John’s International” case (Please bring it to class for lectures all the semester long)</td>
<td>Constitution of groups Case choice due</td>
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<td>Sept. 18</td>
<td>Theme 2: Analysis of the External Environment: Assessing the General and Competitive Environments Chapter 2: pp. 29-63 (Continued)</td>
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<td>Sept. 23</td>
<td>Case 1: Zatshita Ltd</td>
<td>Group 1</td>
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<td>Sept. 25</td>
<td>Theme 3: Analysis of the Internal Environment: Identifying and assessing Resources and Capabilities of the Firm Chapter 3: pp. 64-96</td>
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<tr>
<td>Sept. 30</td>
<td>Case 2: True Buch Kombucha</td>
<td>Group 2</td>
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<td>Oct. 2</td>
<td>Theme 4: Assessing the Intellectual Assets of the Firm Chapter 4: pp. 97-121 and Chap. 11 pp. 322328 (see LO4) Readings: Building a learning organization (UR Courses)</td>
<td>Quiz 1 Jan. 8-Feb 12. 9</td>
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<td>Oct. 7</td>
<td>Case 3: Impsa: restructuring to innovate with existing resources</td>
<td>Group 3</td>
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<td>Oct. 9</td>
<td>Theme 5: Formulation of business (Competitive) level &amp; Functional Strategies Chapter 5 –pp.123-151. See also other readings on the course website</td>
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<td>Oct. 16</td>
<td>Theme 5: Formulation of business (Competitive) level &amp; Functional Strategies (Continued)</td>
<td>Quiz 1 Jan. 8-Feb 12. 9</td>
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<td>Oct. 21</td>
<td>Case 4: Banff Aspen Lodge: evolving the business strategy</td>
<td>Group 4</td>
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<td>October 30</td>
<td>Case 5: Jump Gymnastics</td>
<td>Group 5</td>
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<td>Nov. 13</td>
<td>Case 6: Canopy Growth Corporation</td>
<td>Group 6</td>
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<td>Nov. 18</td>
<td>Theme 8: Industry change and competitive Dynamics</td>
<td>Chap. 8: 218-239</td>
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<tr>
<td>Nov. 20</td>
<td>Theme 8: Industry change and competitive Dynamics (continued)</td>
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<td>Nov. 25</td>
<td>Case 7: HTC and virtual reality</td>
<td>Group 7</td>
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<td>Nov. 27</td>
<td>Case 8: Arla Foods</td>
<td>Group 8</td>
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<td>Dec. 04</td>
<td>Case 9: Asahi Kasei: building an inclusive value chain in India</td>
<td>Group 9 Written report due</td>
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**Final exam**

NB. The write-up for each case will focus more on the themes seen the classes before the day of the presentation. However the team that presents the case will cover the whole strategic management process.
# Written Case evaluation

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<td>Student</td>
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## Criteria

### I. Format (10%)
- Length & conformity 2
- Aspects covered (balance among parts) 6
- General care (grammar & structure) 2

**Total: /10**

### II. Development (90%)
- Identification of pertinent facts (10)
- Recognized pertinent factors/causes (15)
- Importance of research for the case (15)
- Coherence, quality & justification of options (20)
- Adequacy of concepts & theories used (20)
- Solution consistent with the problem (10)

**Total: /90**

**Total WR (I+II): 10+90= /100**
Peer Presentation Evaluation Form

Using the following scales, evaluate the group's presentation. Circle the number that best represents their performance, where 1 is "needs improvement" and 10 is "outstanding". Try to be as objective as possible, these will be used to determine group grades. Write additional comments at the bottom or on the back.

1. Dress, manner, and space occupation
   Well-groomed, space well occupied
   10 9 8 7 6 5 4 3 2 1
   Untidy or/ & bad space occupation

2. Organization and logical flow of presentation (integration, logic and coherence)
   Very organized, coherent, & easy to follow
   10 9 8 7 6 5 4 3 2 1
   Disorganized and confusing

3. Creativity and originality
   Creatively presented the material
   10 9 8 7 6 5 4 3 2 1
   Same old thing

4. Interaction with / involvement of audience
   Asked questions, activity
   10 9 8 7 6 5 4 3 2 1
   You sat and listened during presentation

5. Clarity of presentation/Professionalism
   Very interesting and time efficient
   10 9 8 7 6 5 4 3 2 1
   Bored to death and droned on forever
   Well done professional presentation
   Presentation skills need work

6. Application of strategic management Topic(s)
   Clear explanation of SM topic(s)
   10 9 8 7 6 5 4 3 2 1
   Still not sure if they had SM topic(s)

7. Clearly related strategic management theories to real world
   Made connection between SM theories and organization examples
   10 9 8 7 6 5 4 3 2 1
   No relation of SM theories and organizational examples

8. Ability to field questions / knowledge of topic
   Group appears to understand topic
   10 9 8 7 6 5 4 3 2 1
   They didn’t know what they were talking about

9. Overall learning/new insights
   You learned something from the presentation
   10 9 8 7 6 5 4 3 2 1
   You didn’t learn a thing

___ TOTAL POINTS OUT OF 100 (add up the numbers circled)
Indications on grading (See University of Regina calendar for details)

90-100: an outstanding performance with very strong evidence of an insightful and comprehensive grasp of the strategic management matters; a clear ability to make sound and original critical evaluation of the material given; outstanding capacity for original creative and/or logical thought; an excellent ability to organize, to analyze, to synthesize, to integrate concepts from strategic management and functional areas, and an excellent ability to apply them to a real world situation.

80-89: very good performance on matters mentioned above.

70-79: above average performance with evidence of a substantial knowledge of strategic management matters; a good understanding of the relevant strategic issues and a good familiarity with relevant strategic frameworks and techniques; and above-average ability to organize, to analyze, to synthesize, to integrate concepts from strategic management and functional areas, and an above-average ability to apply them to a real world situation.

60-69: a generally satisfactory and intellectually adequate performance on matters mentioned above.

50-59: a barely acceptable performance on matters mentioned above.

Important Behaviours for Oral Presentations and Responses to Questions

For Oral Presentations

1. Make an appropriate opening comment
2. Vary your voice level and intonation throughout
3. Smile appropriately
4. Make eye contact with the audience
5. Look energetic, peppy, and forceful, avoiding leaning your chin on your palm on a table
6. Speak from carefully prepared notes and avoid reading your talk
7. Make major points clearly
8. Use good transitions between sections of the talk
9. Allocate your time appropriately
10. Audiovisual (A/V) assists must be clear and easy to read
11. Make additional A/V materials if needed
12. Minimize "uhhs," "ahhs," throat clears, and other speech interrupters?
13. Use advance organizers, namely, tell your audience where you are going at the beginning and at key point during the presentation
14. Make sure that the audience follows your results easily
15. Keep your talk simple and to the point
16. Avoid unnecessary details
17. Avoid distracting mannerisms (e.g., excessive movement or fiddling with clothing, mustache, or hair?)
18. Use strategic management concepts or other managerial vocabulary appropriately
19. Explain complex procedures clearly

For Oral Questioning from the professor or your colleagues

20. Make sure that your answers address the questions
21. Make sure that your answers are concise
22. Stay confident during questioning.
23. Qualify your remarks appropriately (e.g., acknowledging speculation as such)
24. Do not respond defensively to antagonistic questions
25. Rephrase hard-to-understand questions before attempting to respond
26. If you do not have a clue to answer to hard questions, use the mirror technique and get help from the class.
Feeling Stressed? Always worried?

Some stress is normal when you’re going to university but 1 in 5 students will suffer from enough distress that they would benefit from counselling.

What can I do?

The U of R offers several counselling services free of charge for students at the U of R. These sessions are confidential and easy to access for students – simply go to the second floor of Riddell, Room 251 to make an appointment.

What options are available for me?

**Personal Counselling** – This is a great option if you’d like one on one attention for things like anxiety and panic, relationship conflict, depression, grief and loss, academic issues, body image and substance abuse.

Up to 5 sessions are free per semester. Try it – talking about your problems can be more helpful than you might think!

**Group Counselling** – Simply put, you’re not alone. Many students are experiencing the same things as you. The U of R offers a wide variety of group counselling opportunities that can help teach many skills for managing your mental health, including: Meditation and relaxation, Healthy relationships, Stress Management and Self-Care.

But I can’t afford counselling...

Seeking counselling doesn’t have to be cost prohibitive. Many students can benefit from the 5 free sessions offered by the University as a benefit of being a student.

If you need more sessions make sure you contact URSU and visit www.iHaveAPlan.ca. Many expenses that are related to mental health, including going to a psychologist, are partially covered by your Student Health and Dental Plan!

**What else can I do?**

Self-care - taking better care of yourself, can help you out. Eating better, working out, smoking and drinking less and balancing school with fun can all help with mental health!
Have a problem but don’t know how to fix it?
URSU’s Student Advocate can help you free of charge!

- Academic Appeals
- Disciplinary Appeals
- Student Loan Appeals
- E-mail advocate@ursu.ca to schedule an appointment today!
- Emergency Bursaries
- Notary Public
- Rentalsman Appeals