

PEPPERDINE UNIVERSITY
THE GEORGE L. GRAZIADIO
SCHOOL OF BUSINESS AND MANAGEMENT

DR. RICHARD T. HERKO
Assistant Professor of Strategy

SPRING 2017

STRATEGIC MANAGEMENT
STGY 659.23 (4 units)
WEDNESDAYS
6:00 PM - 10:00 PM
WEST LA GRADUATE CAMPUS

INTEGRATION IN BUSINESS OPERATIONS: STRATEGIC MANAGEMENT
STGY 670C.23 (1 unit)

SYLLABUS



STRATEGIC MANAGEMENT - STGY 659.23

Simulation Weekend: March 31 & April 1, 2017
Location: West LA Graduate Campus

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Introduction:

STGY 659 examines the enterprise from the perspective of the CEO. The MBA candidate analyzes the external environment, assesses the enterprise's internal capabilities, identifies strategic issues, explores strategic alternatives, and delineates specific actions to implement a strategy to create value for the customers and competitive advantage for the organization. STGY 670C provides the student with the opportunity of running a company in a simulated environment.

STGY 659, Business Strategy - Catalog Course Description:

This capstone course examines the running of an enterprise from the chief executive officer's point of view. It is designed to help students conduct external and internal assessments of an organization, identify its key strategic issues, identify and choose from alternative strategies, and defend those decisions. In addition, the course illuminates the interplay between organizational structure, design, human resources, culture, technology and the global environment. This knowledge gives the student the foundation for understanding and managing change. In summary, students learn to conduct a strategic analysis, make sound strategic decisions and implement strategic change. The course is integrative of all prior subject matter. A variety of experiential methods are used, including case studies and a strategic project on an existing company. STGY 670C must be taken in conjunction with STGY 659.

STGY 670C, Integration Module in Integrated Strategic Management:

This business operations module covers all core courses and the focus is on *Integrated Strategic Management*. Each student team is a firm operating in a simulated economy where the firms compete against each other in the same industry. Faculty stewards introduce situations to be addressed by individuals and by teams. The stewards' interventions reflect situations that may arise during the conduct of business. Resolution of these interventions requires multi-disciplinary considerations. (This one-unit course is graded credit / no credit.)

STGY 659 and STGY 670C Course Objectives:

Strategic Management and the Integration Module provide frameworks and tools for conducting strategic problem identification, analysis and decision making for improving overall organizational performance. These courses are designed to prepare students to analyze the company as a whole; integrate the various functional areas, e.g., accounting, economics, finance, management, marketing, production and operations, quantitative methods; and relate the company to its external environment. These courses strive to aid the students in their development of crucial skills, e.g., critical/multidimensional thinking, analytical, integrative, persuasive, interpersonal, and written and oral communications.

At the end of these courses, the successful MBA candidate should be able to:

1. View the organization from the CEO's perspective.
2. Think strategically as well as functionally.
3. Integrate the individual functions into a cohesive organizational strategy.
4. Formulate strategy from a global perspective.
5. Implement strategy. Employ the unique ability of technology to create value for the customers and competitive advantages for the organization.
6. Develop a strategic leadership perspective necessary to manage effectively in the 21st century. Address ethical dilemmas confronting strategic executives.
7. Understand the role of and to develop the personal qualities of strategic managers such as judgment, wisdom, integrity, and courage.
8. Hone critical thinking and written, oral, and presentation skills.
9. Understand the "Tragedy of Choice"- the process a CEO goes through when making conflicting (SEER) value based decisions at the strategic level.

Methodology:

Classes will be interactive and will consist of lectures, discussions, case analyses, presentations, videos, skill building exercises and the use of the simulation. All MBA candidates are expected to actively participate in class and the simulation.

Grading:

The quality of achievement in the course is measured as follows: "A" indicates superior achievement; "B," indicates average or satisfactory achievement; and "C-" is the lowest passing grade. Letter grades will be assigned for STGY 659, and "Credit" or "No Credit" will be assigned for STGY 670. Performance in STGY 670C is considered in the letter grade assigned for STGY 659.

The grade of "A" earns 4.0 grade points per unit: "A-," 3.7 grade points; "B+," 3.3 grade points; "B," 3 grade points; "B-," 2.7 grade points; "C+," 2.3 grade points; "C," 2.0 grade points; and a "C-," 1.7 grade points.

Each student knows what circumstances impinge upon his/her learning and study. Some have boundless energy to apply to their studies, while others find their power of concentration wanes too soon. Only you know the measure of effort and care you can invest in your learning. Your level of effort in preparation and your participation in discussions and positive contribution will impact your grade. As a guide to workload, by now you know that average study in a good course will require 3 hours or more for each hour in the classroom. A superior grade will require an investment of substantially more time and energy. In addition, there may be extra credit opportunities for those who want to take advantage of it. Further information shall be provided in class and through a separate handout.

Grades are determined on a 100-point scale. If you are a lover of symmetry, 50 of the 100 points will be determined by individual effort and 50 will be determined by group activity. Choose your team wisely. The number of possible points for each component of the course is as follows:

	<u>Points</u>
Team Simulation	12
Team 3-Year Strategic Plan	12
Team Case Presentation	6
Team Business Strategy Project	56
Individual External Analysis Paper	12
Individual Internal Analysis Paper	12
Individual Business Strategy Paper	12
Group Corporate Strategy Paper	10
Group Corporate Strategy Presentation	10
Competitive Dynamics	2
Attendance	5
Participation	5
Peer Feedback	1
Course Feedback	1
TOTAL	<u>100%</u>

Final Grades will be determined based on the number of points you earn using the following grade distribution:

A	94- 100
A-	90- 93.9
B+	88- 89.9
B	82- 87.9
B-	80- 81.9
C+	76- 79.9
C	72- 75.9
C-	70- 71.9

Attendance:

Students are expected to attend all class sessions to contribute to the learning environment. It is recognized that business related activities or illness might necessitate an occasional absence from STGY 659. Points may be deducted for any absences. In the event you will be late or must miss a class entirely, please notify the professor in advance.

Requests to submit late assignments must be made prior to the due date and will be at the discretion of the professor. Extensions prior to the due date are granted so liberally it's almost an embarrassment really. Extensions after the due date are granted so infrequently that the granting of such an extension may be covered by local media outlets.

Conduct:

This course may require electronic submission of essays, papers, or other written projects through the plagiarism detection service Turnitin (<http://www.turnitin.com>). Turnitin is an online plagiarism detection service that conducts textual similarity reviews of submitted papers. When papers are submitted to Turnitin, the service will retain a copy of the submitted work in the Turnitin database for the sole purpose of detecting plagiarism in future submitted works. Students retain copyright on their original course work. The use of Turnitin is subject to the

Terms of Use agreement posted on the Turnitin.com website. You may request, in writing, to not have your papers submitted through Turnitin. If you choose to opt-out of the Turnitin submission process, you will need to provide additional research documentation and attach additional materials (to be clarified by the instructor) to help the instructor assess the originality of your work.

The University expects from all of its students and employees the highest standard of moral and ethical behavior in harmony with its Christian philosophy and purposes. Engaging in or promoting conduct or lifestyles inconsistent with traditional Christian values is not acceptable.

The following regulations apply to any person, graduate or undergraduate, who is enrolled as a Pepperdine University student. These rules are not to be interpreted as all-inclusive as to situations in which discipline will be invoked. They are illustrative, and the University reserves the right to take disciplinary action in appropriate circumstances not set out in this catalog. It is understood that each student who enrolls at Pepperdine University will assume the responsibilities involved by adhering to the regulations of the University. Students are expected to respect order, morality, personal honor, and the rights and property of others at all times. Examples of improper conduct for which students are subject to discipline are as follows:

- *Dishonesty in any form, including plagiarism, illegal copying of software, and knowingly furnishing false information to the University.*
- *Forgery, alteration, or misuse of University documents, records, or identification.*
- *Failure to comply with written or verbal directives of duly authorized University officials who are acting in the performance of assigned duties.*
- *Interference with the academic or administrative process of the University or any of the approved activities.*
- *Otherwise unprotected behavior that disrupts the classroom environment.*
- *Theft or damage to property.*
- *Violation of civil or criminal codes of local, state, or federal governments.*
- *Unauthorized use of or entry into University facilities.*
- *Violation of any stated policies or regulations governing student relationships to the University.*

Disciplinary action may involve, but is not limited to, one or a combination of the alternatives listed below:

Dismissal – separation of the student from the University on a permanent basis.

Suspension – separation of the student from the University for a Specified Length of time.

Probation – status of the student indicating that the relationship with the University is tenuous and that the student's records will be reviewed periodically to determine suitability to remain enrolled. Specific limitations to and restrictions of the student's privileges may accompany probation.

Policy on Disabilities:

Assistance for Students with Disabilities: The Disability Services Office (DSO) offers a variety of services and accommodations to students with disabilities based on appropriate documentation, nature of disability, and academic need. In order to initiate services, students should meet with the Director of the DSO at the beginning of the semester to discuss reasonable accommodation. If a student does not request accommodation or provide documentation, the faculty member is under no obligation to provide accommodations. You may contact the Director of Disability Services at (310) 506-6500. For further information, visit the DSO Web site at: <http://www.pepperdine.edu/disabilityservices/>.

Texts and Course Materials:

Required Text: Rothaermel, Frank T., *Strategic Management: Concepts and Cases, (First Edition)*, McGraw-Hill Irwin, 2013, ISBN 13 9780078112737.

Required Text: Cotter, Richard V. and Fritzsche, David J., *The Business Policy Game, Player's Manual, (Sixth Edition)*, 2010, no ISBN (This is the same book used in GSBM 670X.)

Optional: Polonsky, Michael J. and Waller, David S. *Designing and Managing a Research Project: A Business Student's Guide (Second Edition)*, 2011, ISBN 978-1-4129-7775-3

Articles / Readings – There is no separate book of readings to purchase. Articles shall either be handed out in class or they are available from the Pepperdine Library.

The Wall Street Journal – Current events will be involved in our classroom discussions.

Also consider the following supplements:

The Economist

Forbes (definitely Forbes as I was quoted there in 2016)

Strategic Management Journal

Harvard Business Review

Group Work and Peer Evaluation:

Students will form Management Teams for the purpose of the simulation, facilitating a case, and the Business Strategy project. I encourage you to take advantage of the diversity of perspectives and skills in your CBA class. All of your colleagues are here because they are conscientious students with keen desire to excel. Team members with diverse backgrounds and international experience can learn from each other and enhance their project.

The Peer Evaluation has been used in the past to determine each team member's share of the points on the group work. Your teams will be graded on each facet of your group work and team members will evaluate the value of the work performed by each team member. Team members evaluate each other's contribution (including their own) to the team effort.

Business Policy Game (Simulation):

Using a simulation game, the integration of the functional disciplines of accounting, finance, economics, marketing, production, quantitative analysis, and managing human resources is demonstrated. Students, working in teams, resolve problems and implement plans that deal with the functional areas mentioned and meet the requirements of being consistent and compatible with the larger purposes of the organization as an entity. As part of the simulation, each team will prepare a written strategic plan. Part of the simulation will be run as part of our regular class and the balance will be run during the simulation weekend. Further details are posted on the Sakai site for the class. The fees for the game licenses were included with your registration for this course.

The Business Policy Game (BPG) website is at: <http://www.software.bpgsim.biz> with the (id: *player* and password: *swb30oss*). Also available on the BPG web site: the Player's Program (i.e. the graphical user interface), spreadsheet templates, a tutorial, FAQ's, and a non-printable version of the Player's Manual.

Simulation Weekend - Reflection Paper (Optional and Not Graded):

Each person shall turn in a 2 - 3 page reflection paper (bullets and/or outline format is OK) at the first class meeting after the simulation weekend, answering the following three items:

1. Successes
2. Areas for improvement
3. Lessons

This reflection paper shall *not* be graded.

Ethical Use of Business Policy Game:

The Code of Academic Ethics and Conduct at Pepperdine (as stated in the GSBM Catalog) "maintains free competition and independent intellectual effort, not tolerating dishonesty, cheating, plagiarism, or abusive behavior in any form". Since the Business Policy Game is quite challenging and since there is a strong sense of competition among teams, certain teams in the past have secured the services of "consultants" or "tutors" to provide advice on the Game, on the Three Year Plan, and/or on the team reports. While this may be innocent, it may be perceived by others as being inconsistent with the GSBM Code of Academic Ethics and Conduct. Therefore, to avoid any hint of impropriety, prior written approval is required from S. Baumgartner before any team or team member receives advice from anyone outside their team. To obtain prior written approval, you must notify Professor Stephen Baumgartner in writing and please state the full name of the consultant or tutor, specifically what type of advice is being provided, and whether the consultant is being compensated in any way.

Team Textbook-Case Presentation:

Each team will lead the discussion of one of the textbook cases. The determination of how to "lead" that discussion is at the discretion of the team. I will during the course of the semester model several different approaches to case leadership. The team is free to choose one of those or facilitate discussion and understanding in any other method. The rubric for assessing the case presentation can be found in the appendices.

Cases Preparation:

The assigned cases will be discussed in class, and all class members should be fully prepared to discuss each case. If you expect to miss a class you may submit your personal notes/reflections via email before we discuss the case (or in the case of an unexpected absence, prior to the next class). Case preparation and participation are important in considering your points for class participation.

If you are submitting, your written analysis must always have three separate sections (as described below) and must address the same three following items:

1. **Current Strategy:** Identify key aspects of the firm's strategy and provide your view of how well that strategy is working. Include an analysis with one of the class tools and a financial analysis.
2. **Key Strategic Issues:** Identify three key strategic issues that the CEO of the firm should be paying the most attention to (in their prioritized rank order of strategic importance). Explain your prioritization logic, why each issue is important, and what will happen (and when) if they don't address each issue; don't recommend how to solve them in this section.
3. **Recommendations:** Provide strategic recommendations to the CEO on both "what" to do and "how" to do it for each of the Key Strategic Issues you identified in Section #2 above. Discuss alternative approaches, the pros and cons of your recommendations, possible short term vs. long term solutions, and how you would pay for them. This is your chance to apply your creativity to the cases.

Your analysis must be submitted electronically, and it may be in bullet or outline form. The purpose of the analysis is to prepare you to make substantive contributions to the class discussion for each case. Any case analyses submitted will count towards your participation grade in the course.

Articles / Readings:

For each assigned article, a brief paper can be prepared. There is no requirement to submit these analyses except under Alternative to Class Participation (below) or if you would like to get feedback. The paper will answer the following two questions:

1. What is the important contribution of this article to strategic management?
2. What do I "take away" from the article and how are they applied?

Your analysis must be submitted electronically, and it may be in bullet or outline form. Any case analyses submitted will count towards your participation grade in the course.

Alternative to Class Participation:

Exploring the concepts from the cases and articles and developing an understanding of the material is critical to optimizing the learning in class. The best way to do this is with pre-class prep, including sketching your ideas about the topic on paper, followed by testing your ideas in amongst your peers during our class meetings.

Not everyone is comfortable with this learning approach so in lieu of class participation for the semester, students may submit any four (4) case write-ups and any two (2) article write-ups. In addition, if you have a conflict that will prevent you from attending a class session, you may submit the article or case from that session which will count for your participation for that session.

Business Strategy Project:

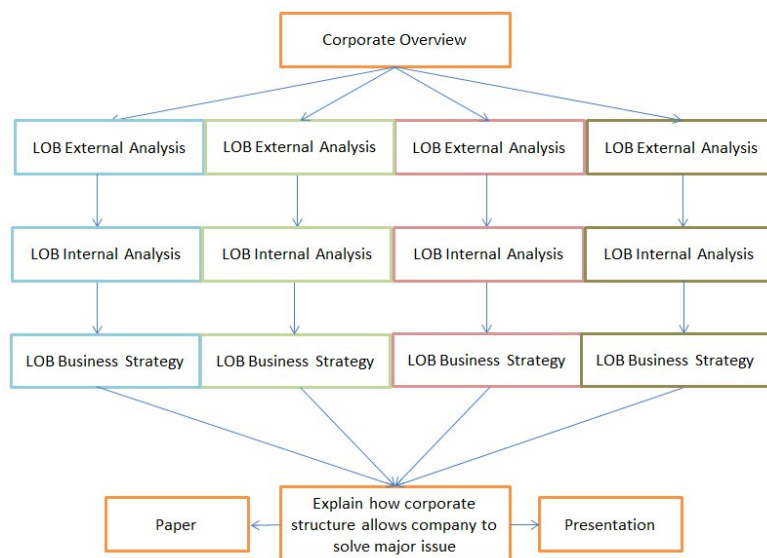
Each Management Team will select, study, and analyze all facets of an actual organization. This project will be based on primary research, including potentially "on-site" interviews and secondary, including library and database, research. Your proposal will identify the organization, how you will collect information for the case, and your motivation for selecting this business for your project.

The first deliverable is a **group** proposal (one paragraph maximum) in which the team commits to a company and each team member indicates which LOB in that company they will be studying over the course of the summer. This becomes a contract of sorts between the team, the individual members and the professor.

The second, third and fourth deliverables are **individual** papers analyzing a specific line of business within the organization of interest. The focus of these papers should be using the tools and frameworks from the class to gain a better understanding of the business-level issues facing the most important divisions of the organization.

The fifth deliverable is a **group** paper which analyzing how the structure of the organization aids in solving a major issue facing the organization.

The sixth deliverable is a **group** presentation highlighting the major findings from the five deliverables.



Competitive Dynamics:

In an effort to ensure each student gets to experience as aspects of strategy individually and as part of a team, each student will devise a strategy for a game and compete against a randomly assigned classmate opponent. The games must be complex enough for the development of strategy. Suggested games include longer games, which are played once (Monopoly, Stratego, Risk, Battleship, Chess and computer strategy simulations such as Civilization) and shorter games which are played as multiple rounds, for example best of five (Othello, Mancala, Connect Four, and Checkers). When a game is played over a longer period or additional rounds, the opportunity arises for changes in strategy.

The assignment here is to document and submit a strategy prior to playing the game. Then, if necessary document and submit any changes to your strategy during the game. Finally players must submit an agreed upon outcome to the game.

Class Preparation:

Each student is required to be fully prepared for each class. Your case notes and papers on articles are part of your participation grade. The professor may call on any member of the class to discuss material included in the text, a case, or any of the reading assignments. All of your presentations should promote intellectual interaction. Do not merely recite facts, but focus on their strategic implications for the organization. Challenge yourselves and your colleagues to extract key ideas and critically evaluate proposed actions. Respectful discussion improves the decision process.

Grading for participation is based on the quality as well as quantity of your answers. You are unlikely to receive a good participation grade for a case study discussion if you only say one thing. However, if you talk a lot without making a contribution, you are also unlikely to receive a good grade for participation. I also make note of behavior that is disruptive to creating a learning environment (e.g. comments that don't contribute to the discussion and/or are unprofessional, talking to other students in a way that is disruptive, playing with one's cell phone or using computers or cell phones during the class).

Public speaking is a crucial skill in the competitive work place of today, and therefore I hope you will see this class as an opportunity to practice and improve that skill. I understand it is difficult for some people to speak in public, but it is better to practice in class than elsewhere. The best way to control your nerves, if you have any, is to come prepared to class with suggestions on how to respond to the dilemmas presented in the case backed up by case facts.

Use of Pepperdine Email Address for Communications from Faculty:

Please note that email sent to you by faculty members shall typically use your Pepperdine email address. If you do not routinely check your Pepperdine email, you may set up a function so that all email sent to your Pepperdine email address is automatically forwarded to another email address you specify. The Pepperdine "Help Desk" can provide guidance on this.

Communication:

Open and ongoing communication between members of the learning community is an important part of this educational experience. I invite and encourage you to get in touch with me either before or after class, via email, phone or in person during office hours, to discuss any ideas or concerns you may have related to the field of Strategic Management or business in general.

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ASSIGNMENTS – STGY 659.23 – Wednesdays
West LA Graduate Campus – Spring Trimester 2017

CLASS	DATE	COURSE MATERIAL	DELIVERABLES
1	Jan 11	Orientation Chapter 1: What Is Strategy and Why Is It Important? What is the SEER lens and how does it apply to Strategic decision making Case: Robin Hood Article: Porter, 1996, “What is Strategy?”	In class: Pre-Test Group Formation
2	Jan 18	Chapter 2: The Strategic Management Process Review Library Databases	Corp Strategy Proposal Due Jan 19 th
3	Jan 25	Chapter 3: External Analysis Article: Porter, 2008, “The Five Forces That Shape Strategy” Case: InterfaceRAISE	
4	Feb 1	Chapter 3: External Analysis Case: Rogers Chocolates	
5	Feb 8	Chapter 4: Internal Analysis Case: JetBlue Article: Prahalad and Hamel, 1990, “The Core Competence of the Corporation”	Business External Analysis Due Feb 9 th
6	Feb 15	Chapter 4: Internal Analysis Case: DeBeers	Team 1 Case Leaders
7	Feb 22	Chapter 5: Competitive Advantage and Firm Performance Case: Better World Books Article: Kaplan and Norton, 1992, “The Balanced Scorecard”	Team 2 Case Leaders
8	Mar 1	VOLUNTEER OPPORTUNITY w/ CLASS CREDIT To Be Discussed	Business Internal Analysis Due Mar 2 nd
9	Mar 8	Chapter 6 & 7: Business Strategy Case: Best Buy	Team 3 Case Leaders
10	Mar 15	Chapter 8: Corporate Strategy: Vertical Integration and Diversification Case: General Electric	Team 4 Case Leaders

11	Mar 22	Chapter 9: Corporate Strategy: Acquisitions, Alliances, and Networks Case: Lego	Team 5 Case Leaders
12	Mar 29	Chapter 10: Global Strategy: Competing Around the World Case: Geox	Business Strategy Papers Due Mar 30 th
	Mar 31-Apr 1	Simulation Weekend	Strategic Plan Goals (grading) Decision
13	Apr 5	Chapter 11: Organizational Design: Structure, Culture and Control Case: United Technologies	
14	Apr 12	Chapter 12: Corporate Governance, Business Ethics and Strategic Leadership SEER Values in Practice Case: Corporate Governance Article: Useem, 2006, "How Well-Run Boards Make Decisions"	
15	Apr 19	Corporate Strategy Project Group Presentations Course Wrap-Up	Corporate Strategy Papers Due along with Presentation

Appendix 1: Directed Instruction Metrics

Directed Instruction Activity	List of Specific Class Elements	Range of Time Over Trimester
Synchronous Instruction	In-class meetings	~ 42.9 hours (3.3 hours per class)
Non-Synchronous Instruction	Non-class meeting	~ 3 hours
Personal Communication	E-mail Communication Phone calls Texts Coffee meetings	0.1 – 3 hours
External Reading	Up to 4 external reading assignments (articles or case submitted for grade and with feedback provided online)	4 – 10 hours
Competitive Dynamics	Strategic game of students choice, played against another student in class	1 – 3 hours
Mentoring (available)	Open classroom for students before and after class, during dinner break and by appointment	14 – 77 hours
Feedback on Draft Writing Assignments (available)	Students may submit rough drafts for review prior to final grade	0 – 2 hours per assignment
Office Hours (available)	Mondays 10-1 and Fridays 12-3 open office hours in Malibu and by appointment	0 – 104 hours (up to 8 hours per week)
Alumni Interest Group (available)	Monthly meeting with current and former students to discuss additional topics in Strategy (deeper dives on forecasting, entrepreneurship, leadership, professional development & job search/upgrade)	0 – 12 hours
Community Service Project (optional)	Beach Clean-Up with Heal the Bay Choose one or more of three dates	2 – 6 hours
Totals		68 – 262.9 hours

Appendix 2: Rubric for External and Internal Analysis

- Clarity and logic of writing (40 points)
 - Interesting and well-written (20 points)
 - Major structural/formatting/grammar issues/poorly written – 0-5 points
 - Some issues which take away from reading – 6-12 points
 - A good read – 13-16 points
 - Particularly well-written – 17-19 points
 - A paper which adds to my understanding of the case – 20 points
 - Demonstrate knowledge of class concepts (10 points)
 - No connection to class – 0 points
 - Little connection to class – 1-3 points
 - Gratuitous application of class concepts – 4-7 points
 - Well-thought application of class concepts – 8-9 points
 - Integration of class concepts into case – 10 points
 - Demonstrate knowledge of case (10 points)
 - No connection to case – 0 points
 - Little connection to case – 1-3 points
 - Gratuitous application of case highpoints – 4-7 points
 - Well-thought application of key issues – 8-9 points
 - Integration of case into narrative – 10 points
- Rigor of Analyses (60 points)
 - Analytical tool #1 (30 points)
 - Appropriate tool (9 points)
 - No – 0 points
 - Yes – 9 points
 - Correctly applied (21 points)
 - No – 0 points
 - Yes, but with major problems – 1-6 points
 - Yes, but with minor problems – 7-11 points
 - Yes, but with minor issues – 12-17 points
 - Yes, and well done – 18-21 points
 - Analytical tool #2 (30 points)
 - Appropriate tool (9 points)
 - No – 0 points
 - Yes – 9 points
 - Correctly applied (21 points)
 - No – 0 points
 - Yes, but with major problems – 1-6 points
 - Yes, but with minor problems – 7-11 points
 - Yes, but with minor issues – 12-17 points
 - Yes, and well done – 18-21 points

Appendix 3: Rubric for Business Strategy and Corporate Strategy Paper

- Clarity and logic of writing (30 points)
 - Interesting and well-written (20 points)
 - Major structural/formatting/grammar issues/poorly written – 0-5 points
 - Some issues which take away from reading – 6-12 points
 - A good read – 13-16 points
 - Particularly well-written – 17-19 points
 - A paper which adds to my understanding of the case – 20 points
 - Demonstrate knowledge of class concepts (10 points)
 - No connection to class – 0 points
 - Little connection to class – 1-3 points
 - Gratuitous application of class concepts – 4-7 points
 - Well-thought application of class concepts – 8-9 points
 - Integration of class concepts into case – 10 points
- Rigor of Analyses (70 points)
 - Analytical tool or framework (30 points)
 - Appropriate tool (9 points)
 - No – 0 points
 - Yes – 9 points
 - Correctly applied (21 points)
 - No – 0 points
 - Yes, but with major problems – 1-6 points
 - Yes, but with problems – 7-11 points
 - Yes, but with minor issues – 12-17 points
 - Yes, and well done – 18-21 points
 - Did the author(s) take a stand on the issue(s)? (10 points)
 - No – 0 points
 - Sort of, kind of – 1 point
 - Yes – 10 points
 - Did the author(s) offer recommendations for what the company can do differently? (10 points)
 - No – 0 points
 - Yes – 10 points
 - Are those recommendations practicable? (10 points)
 - No – 0 points
 - Limited usefulness – 5 points
 - Yes – 10 points
 - Are those recommendations novel? (10 points)
 - No – 0 points
 - Similar to what they are already doing – 5 points
 - Yes – 10 points

Appendix 4: Rubric for Case Presentations

STGY 659 Group Presentation Evaluation	
Focal Company	
Content	Doubled
Speakers presented relevant information	
Speakers presented interesting information	
Presentation had originality and creativity	
Speakers responded to questions knowingly	
Presentation engaged the audience	
Clear references to material from STGY 659	
Outline potential sources of competitive advantage	
Develop clear links to source material from case	
Organization	
Presentation was well-structured with smooth transitions	
Main points were logical and easy to follow	
Introduction captured audience and provided road map	
Mechanics & Delivery	
Speakers' terminology was familiar to the audience	
Verbal pauses/presentation errors were not distracting	
Presentation tools (particularly use of notes) were not distracting	
Strengths	
Weaknesses	

Appendix 5: Partial List of Topics

Tool or Framework	Use
Strategic Planning Process (Rothaermel, Barney, Narayana, Wheelen, Prescott, Wehrich, NASA)	Analysis Formulation Implementation
Contingency Planning	Analysis Formulation Implementation
Strategic Fit (Miles and Snow)	Analysis Formulation
PESTLE	External Analysis
5 Forces (Porter)	External Analysis Business Strategy Corporate Strategy
Strategic Groups	External Analysis
SCP	External/Internal Analysis
Industry Structure	External Analysis
Industry Life Cycle	External Analysis
Forecasting	External/Internal Analysis Business Strategy Corporate Strategy
Rothaermel's Linking of Resources and Capabilities (path dependence)	Internal Analysis Business Strategy Corporate Strategy
Resource-Based View	Internal Analysis Business Strategy Corporate Strategy
VRIO	Internal Analysis
Prahalad's Core Capabilities	Internal Analysis Business Strategy Corporate Strategy
Value Chain	Internal Analysis Business Strategy Corporate Strategy
TOWS	External/Internal Analysis
Strategic Activity Maps (Defending Resources and Capabilities)	Internal Analysis
Knowledge-Based View	Internal Analysis
Value Networks	External/Internal Analysis
Generic Strategies	Business Strategy Analysis
Financial Analysis	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Balanced Scorecard	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Triple Bottom Line	External/Internal Analysis Business Strategy Corporate Strategy Implementation

Tool or Framework	Use
SEER	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Economies of Scale, Scope, and Learning	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Porter's Position and Scope Framework (Exhibit 6.2)	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Product/Process Innovation Model	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Ambidexterity	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Innovation Model (Ven diagram)	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Innovation Market/Technology Model	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Disruptive Innovation	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Pareto Principle	External/Internal Analysis Business Strategy Corporate Strategy
Radical vs. Incremental Innovation	External/Internal Analysis Business Strategy Corporate Strategy
Hyper-competition	Business Strategy Corporate Strategy
Diversification-Performance Relationship	Corporate Strategy
Vertical and Horizontal Integration	Corporate Strategy
Dis-integration	Corporate Strategy
Agency Theory	Corporate Strategy Business Strategy External/Internal Analysis Implementation
Transaction Cost Economics	Corporate Strategy Business Strategy External/Internal Analysis Implementation
Hamel and Prahalad's Core Competence-Market Matrix	Corporate Strategy Business Strategy Implementation

Tool or Framework	Use
Ming Jer-Chen's Competitor Analysis	Corporate Strategy
Boston Consulting Group Matrix	External/Internal Analysis Business Strategy Corporate Strategy
Organic Growth	Business Strategy Corporate Strategy
Penetration/Diversification Model	Business Strategy Corporate Strategy
Network Theory	External/Internal Analysis Business Strategy Corporate Strategy
Institutional Theory	External/Internal Analysis Business Strategy Corporate Strategy
Real Options	External/Internal Analysis Business Strategy Corporate Strategy
Deviance Typology	External/Internal Analysis Business Strategy Corporate Strategy
Position to Peer Matrix	External/Internal Analysis Business Strategy Corporate Strategy
Integration/Responsiveness Matrix	External Analysis Business Strategy Corporate Strategy
Porter's Diamond	External Analysis Business Strategy Corporate Strategy
Agglomeration	External/Internal Analysis Business Strategy Corporate Strategy Implementation
Wicked Problems	Business Strategy Corporate Strategy Ethics
Organizational Pyramid	Internal Analysis Business Strategy Corporate Strategy Implementation
Organic vs. Mechanistic Organizations	Internal Analysis Business Strategy Corporate Strategy Implementation
M-form Corporation (Matrix)	Internal Analysis Business Strategy Corporate Strategy Implementation
Cognitive Theory	Internal Analysis Business Strategy Corporate Strategy Implementation

Tool or Framework	Use
Property Rights Theory	Internal Analysis Business Strategy Corporate Strategy Implementation
New Theory	Internal Analysis Business Strategy Corporate Strategy Implementation
Level 5 Leadership	Internal Analysis Business Strategy Corporate Strategy Implementation
Pyramid of Corporate Social Responsibility	Internal Analysis Business Strategy Corporate Strategy Implementation