



STGY 5903K: Strategic Concepts

Winter 2026

Instructor	Prof. Guoliang Frank Jiang
Email Address	frank.jiang@carleton.ca
Class Times	Fri, Jan 30, 8:35 am - 5:25 pm Sat, Jan 31, 8:35 am - 5:25 pm Fri, Feb 6, 8:35 am - 5:25 pm Sat, Feb 7, 8:35 am - 5:25 pm
Modality	In-person
Office Hours	By appointment
Office Location	5056 Nicol Building
TA Name/Email	

Pre-Requisites & Preclusions:

Prerequisites: n/a

Preclusions: BUSI 5001

Course Description/Instructor's Statement

Carleton Calendar Description

An overview of business models and key strategic concepts facing firms in a global environment. Core functional area concepts in accounting, marketing, operations and HR are introduced and integrated through simulation. Skills in managing teams, meetings, business planning and presenting business plans.

Instructor's Description:

This course provides students with the conceptual tools necessary to assess firms' business models and strategies. Specifically, the course focuses on the application of the following key strategic concepts and frameworks: business model, value chain, core competence, competitive advantage, SWOT analysis, organizational structure, etc.

Business managers need to make critical decisions that transcend functional areas. Through a series of case studies and an online business simulation, this course provides students with experiential learning opportunities to develop a holistic organizational perspective that integrates subsequent specialized functional area courses such as marketing, operations, human resource management, and accounting.

Course Learning Objectives:

1. An understanding of fundamental aspects of business models and strategies
2. Application of conceptual frameworks to the analysis of practical business problems

3. An understanding of the role of diverse functions such as marketing, operations, finance, and human resource management in determining firm performance
4. Familiarity with the elements of business plan preparation
5. Development of critical thinking skills
6. Development of communication skills
7. Experience in managing teams

Required/Optional Materials & Prices

Readings

A list of articles from published journals has been compiled for the course. These readings are available at “ARES Reserves” on Brightspace.

Coursepack

A coursepack comprising of case studies, teaching notes, and an online simulation (*Surgical Robotics*) has been created at the Harvard Business Publishing website. Follow the link (<https://hbsp.harvard.edu/import/1361945>) to purchase this required material before the course starts. You can find the step-by-step instructions for purchasing the coursepack at [Accessing a Coursepack Assigned to You – Harvard Business Publishing Education](#). It is strongly recommended that you use your Carleton email address when you register for a student account. Students must purchase the coursepack individually to participate in the online simulation. The price of the coursepack is USD 56.

Grading Scheme

* Simulation performance	5%
* Reflection on the simulation	25%
Group responses to brief cases	20%
Group case presentation (“flipped classroom”)	10%
* Individual class participation	15%
* Final case report	25%
Total	100%

** Items with asterisk are individual components*

Important Dates to Note

Online simulation	Jan 30-31, 2026
Reflection on the simulation	Feb 11, 2026
Group case presentation	Feb 7, 2026
Final case report	Feb 15, 2026
Group responses to brief cases	Ongoing
Individual class participation	Ongoing

University Academic Calendar: <https://calendar.carleton.ca/academicyear/>

Policies & Accommodations

<https://students.carleton.ca/course-outline/>

<https://carleton.ca/pmc/current-students/academic-accommodations/>



Stay updated with important notifications and announcements from Carleton University, by downloading the Carleton University App!

Additional Information on Deliverables and Grading

Each component of your grade will be assigned a percentage score. Your final course grade will be a weighted average of each of these components.

Simulation Performance

Playing the role of the CEO, you are responsible for the performance of the company you manage in the simulation. The results of Year 8 in the simulation will be used to determine one's grade for the simulation.

Reflection on the Simulation

This assignment is aimed at facilitating practical and theoretical integration based on the student's experience with the simulation. This report must consist of two main parts. In the first part, describe the overall business goal(s) using appropriate business metrics, and the competitive landscape against which they formulated their strategy. They must briefly review the evolution of their company's strategy and the value proposition of its brand. Students need to explain the rationale behind the value proposition and the firm's strategy. In the second part, students should critically assess their company's performance and business model, especially explaining whether the company has a competitive advantage. In addition, students need to explain whether the company's strategy is aligned with its strengths and weaknesses and if any strategic adjustments are needed. Most importantly, students must reflect on the theoretical and practical lessons they have learned from the simulation.

Group Responses to Brief Cases

Students will be assigned to small groups to analyze several brief cases throughout the course. On these occasions each group will prepare brief responses to a set of questions based on a short case.

Group Case Presentation ("Flipped Classroom")

In a "flipped classroom" the student's role shifts from passive recipient to active constructor of knowledge. The core idea is that students, not the instructor, will lead the discussion of each case. This method is aimed at fostering critical thinking, improving communication skills, and deepening your understanding of course material and managerial decision-making.

This exercise consists of two parts. Each group will first present its analysis of the case to the class. All group members must participate in the presentation. After the presentation, the presenting team will lead the class discussion. The presentation will be graded based on its application of relevant concepts, theories, and frameworks and the depth of the assessment of the strategic issues and

recommendations. The presenting team will also be evaluated based on how effectively it engages peers and connect discussion points back to the core concepts and theoretical perspectives.

Individual Class Participation

Participating in class discussion, especially case studies, is an essential component of this course. Critical analysis and constructive criticism are prerequisites to both learning and action. I strive to create a “riskless” environment in which students can freely test their ideas and improve critical thinking and communication skills. Participation grades will be based on the quality and frequency of one’s in-class comments. The following four-point scale guideline indicates how I evaluate individual contribution. Your final participation mark is determined by the recorded performance throughout the course.

Contribution		Examples
None	0	<ul style="list-style-type: none"> • Not prepared for or not involved in class discussion
Basic	1	<ul style="list-style-type: none"> • Responds to questions about case facts • Shows basic understanding of course concepts • Seeks or offers clarification of points raised by others
Moderate	2	<ul style="list-style-type: none"> • Offers clear, concise analysis relevant to class discussion • Applies theoretical concepts to case materials • Builds on peer comments to advance class discussion
Advanced	3	<ul style="list-style-type: none"> • Introduces original ideas and supports them with theoretical concepts and case facts • Reflects deep and nuanced understanding of course concepts • Ties viewpoints together and suggests management implications

Final Case Report

The final report is a case-based, take-home exam. The case will be announced on the last day of the class. In the case report, you must identify the key managerial issue(s) and decision(s) to be made. You need to demonstrate the ability to critically analyze external and organizational factors that influence the firm’s performance and strategy. You also need to develop and evaluate practical strategic alternatives and make final recommendations. You should aim to apply concepts and frameworks learned in class to your analysis. The report should be prepared in a memo format from the perspective of the decision maker in the case.

Late Assignments:

To ensure fairness for all students, penalties will be applied to late assignments: Failure to submit an assignment on time will result in an initial penalty of five (5) percentage points, followed by an additional (2) percentage points per day thereafter. For example, an assignment that would normally merit a grade of 80% would receive a grade of 75% if submitted after the deadline on the due date, 73% if submitted the following day, and so on. Requests for extension will be considered in cases of illness, family emergency, or other exceptional circumstances.

Preparation and Participation:

Refer to the *Grading Scheme* section for more details.

Contribution to Program Learning Goals ([MBA](#)):

MBA Learning Goal	Not Covered	Introduced	Taught but Not Assessed	Taught <u>and</u> Assessed
MB1 Leadership and Collaboration <i>Graduates will be equipped for leadership and collaboration.</i>		✓		
MB2 Communication <i>Graduates will be effective communicators</i>				✓
MB3 Critical Thinking and Problem Solving <i>Graduates will be skilled in critical thinking and problem solving.</i>				✓
MB4 Functional Knowledge <i>Graduates will have functional knowledge of all areas of business.</i>				✓
MB5 Global Business <i>Graduates will have an appreciation of the global environment of business.</i>		✓		
MB6 Ethical Reasoning <i>Graduates will be skilled in ethical reasoning and decision-making.</i>		✓		

COURSE SCHEDULE

Day	Topic/Agenda	Readings
01/30	<p><u>Case study:</u> Disruptive Change at Bossard</p> <p><u>Simulation:</u> Surgical Robotics, dry run</p>	<p><u>Required reading:</u></p> <ul style="list-style-type: none"> • Porter, M. 1996. What is strategy? Harvard Business Review, 74(6): 61-78. • Johnson, M., Christensen, C., & Kagermann, H. 2008. Reinventing your business model. Harvard Business Review, 86(12): 50-59. • Porter, M.E., 2008. The five competitive forces that shape strategy. Harvard Business Review, 86(1): 78-93. • Kim, C., & Mauborgne, R. 2005. Blue ocean strategy: From theory to practice. California Management Review, 47(3): 105-121. • Christensen, C., Bartman, T., & van Bever, D. 2016. The hard truth about business model innovation. MIT Sloan Management Review, 58(1): 31-40. • Ghemawat, P. & Rivkin, J. 2006. Creating Competitive Advantage. Harvard Business Publishing (<u>this reading is in the coursepack</u>).
01/31	<p><u>Case study:</u> Planet Fitness</p> <p><u>Simulation:</u> Surgical Robotics</p>	<p><u>Optional reading:</u></p> <ul style="list-style-type: none"> • Amit, R., & Zott, C. 2012. Creating value through business model innovation. MIT Sloan Management Review, 53(3): 41-49. • Porter, M. 1980. Industry structure and competitive strategy: Keys to profitability. Financial Analysts Journal, 36(4): 30-41. • Kanopy. Forward and Backward Integration. Kanopy Streaming, 2016. [video]
02/06	<p><u>Case study:</u> Shein vs. Zara</p>	<p><u>Required reading:</u></p> <ul style="list-style-type: none"> • Barney, J. 1995. Looking inside for competitive advantage. Academy of Management Executive, 9(4): 49-61. • Collis, D., & Montgomery, C. 2008. Competing on resources. Harvard Business Review, 86(7/8): 140-150. • Collis, D., & Rukstad, M. 2008. Can you say what your strategy is? Harvard Business Review, 86(4): 82-90.
02/07	<p><u>Case study:</u> Veritas</p> <p><u>Flipped classroom:</u> Barber Cardiosystem & SKF India</p>	<ul style="list-style-type: none"> • McGrath, R. G. 2013. Transient advantage. Harvard Business Review, 91(6): 62-70. • Bingham, C., Eisenhardt, K., & Furr, N. 2011. Which Strategy When? MIT Sloan Management Review, 53(1): 71-77. • Schoemaker, P. 1992. How to link strategic vision to core capabilities. Sloan Management Review, 34(1): 67-81. • Rumelt, R. 2011. The perils of bad strategy. McKinsey Quarterly (June): 30-39. <p><u>Optional reading:</u></p> <ul style="list-style-type: none"> • Porter, M. 1988. COMPETITIVE STRATEGY. "Michael Porter on Competitive Strategy: Reflections and Round Table Discussion." European Management Journal, 6(1): 2-9. • Lovallo, D., & Sibony, O. 2006. Distortions and deceptions in strategic decisions. McKinsey Quarterly (1): 18-29. • Ghemawat, P. 1986. Sustainable advantage. Harvard Business Review, 64(5): 53-58. • Kanopy. The Danger of Straddling. Kanopy Streaming, 2015. [video]

ADDITIONAL INFORMATION

Course Sharing Websites:

Materials created for this course (including presentations and posted notes, labs, case studies, assignments and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

Recommended Calculator for Examinations:

If you are purchasing a calculator, we recommend any one of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

Group Work:

The Sprott School of Business encourages group assignments. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership and other group skills. Group assignments are also an effective way to learn integrative skills for putting together a complex task. Your professor may assign one or more group tasks, assignments, or projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Letter Grades:

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

A+ = 90-100	B+ = 77-79	C+ = 67-69	D+ = 57-59	F = Below 50
A = 85-89	B = 73-76	C = 63-66	D = 53-56	
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52	

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

Academic Regulations:

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<https://calendar.carleton.ca/grad/gradregulations/>

Requests for Academic Accommodation:

Carleton is committed to providing academic accessibility for all individuals. You may need special arrangements to meet your academic obligations during the term. The accommodation request processes, including information about the Academic Consideration Policy for Students in Medical and Other Extenuating Circumstances, are outlined on the Academic Accommodations website (students.carleton.ca/course-outline).

You may need special arrangements to meet your academic obligations during the term. For an accommodation request, the processes are as follows:

- **Pregnancy**

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

- **Religious Obligations**

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

- **Students with Disabilities**

If you have a documented disability requiring academic accommodations in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or pmc@carleton.ca for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC no later than two weeks before the first in-class scheduled test or exam requiring accommodation (if applicable). After requesting accommodation from PMC, meet with your instructor as soon as possible to ensure accommodation arrangements are made. <https://carleton.ca/pmc/>

- **Survivors of Sexual Violence**

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and its survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: <https://carleton.ca/sexual-violence-support/>

- **Student Activities**

Carleton University recognizes the substantial benefits, to both the individual student and the university, that result from participating in activities beyond the classroom experience. Reasonable accommodation will be provided to students who compete or perform at the national or international level. Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. <https://carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf>

For more information on academic accommodation, please contact the departmental administrator or visit: <https://students.carleton.ca/course-outline/>

Academic Integrity:

Violations of academic integrity—presenting another's ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student—are a serious academic offence, weaken the quality of the degree, and will not be tolerated. Penalties may include; a grade of Failure on the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension

from all studies at Carleton; expulsion from Carleton, amongst others. Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <https://carleton.ca/registrar/academic-integrity/>

Centre for Student Academic Support:

The Centre for Student Academic Support (CSAS) is a centralized collection of learning support services designed to help students achieve their goals and improve their learning both inside and outside the classroom. CSAS offers academic assistance with course content, academic writing and skills development. Visit CSAS on the 4th floor of MacOdrum Library or online at: <https://carleton.ca/csas/>

Other Important Information:

- Students must always retain a copy of all work that is submitted.
- All final grades are subject to the Dean's approval.
- For us to respond to your emails, we need to see your full name, CU ID, and the email must be written from your valid CARLETON address. Therefore, in order to respond to your inquiries, please send all email from your Carleton cmail account. If you do not have or have yet to activate this account, you can do so by visiting <https://carleton.ca/its/get-started/new-students-2/>