

Strategic Management: BUSI4609 E

Fall 2026

Instructor	Carmen Crinjala
Email Address	carmencrinjala@cunet.carleton.ca
Class Times	Mondays, 6:05 pm – 8:55 pm
Class Location	Nicol Building 4050
Modality	In class only
Office Hours	By appointment
Office Location	*No Office*
TA Name/Email	TBA

Pre-Requisites & Preclusions:

https://calendar.carleton.ca/undergrad/courses/BUSI/

Prerequisites: Fourth-year standing in all B.Com. and successful completion of all 2000- and 3000- level courses in the Major requirement, normally completed within the last 10 years. Note that B.Acc and B.Com. concentration in International Business students require BUSI 4709

Preclusions: Precludes additional credit for BUSI3629 and BUSI4709

Course Description/Instructor's Statement

Carleton Calendar Description

Strategic Management
Analysis and evaluation of the organization's corporate and business strategies; integration and synthesis of knowledge acquired in the program by application of acquired functional skills to strategic decision making.

Instructor's Course Description:

Strategic Management is the Sprott School of Business's capstone course. Completed in the final (4th) year of study in the undergraduate program, this course focuses on strategy making in for-profit business corporations. Students are required to select a publicly traded firm on the NYSE, NASDAQ or TSX to research and analyze it intensively and extensively. Each group must identify and evaluate opportunities and threats in the macro and industry environments of the selected firm and analyze the firm's strengths and weaknesses in its value chain, using annual reports, to determine if the firm has created a sustainable competitive advantage by creating value for its customers. Emphasis is on corporate, business and functional level strategic analysis and strategy formulation which enhances value creation for stakeholders. The course serves to integrate and synthesize knowledge acquired in the functional disciplines of the business school curriculum by application of acquired functional skills to corporate and business strategic analysis.

Students are required to carry out extensive empirical business research for this course using multiple government (e.g., Statistics Canada, US Census Bureau, Federal Reserve FRED, Bank of Canada) and private databases (e.g., Bloomberg, Mergent, Factiva, and Business Source Premier). Students must select an approved, publicly-traded, for-profit business

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firm; research the firm; perform a comparative empirical strategic analysis; and develop and present Corporate, Business and Functional 8strategies for the firm.

Course Learning Objectives:

1. To familiarize the student with strategic thinking and its component elements, the identification of strategic options and techniques for strategy selection.
2. To integrate the functional knowledge acquired in past business courses by applying those functional skills to analyze a single firm and recommend appropriate strategies.
3. To understand key strategic concepts such as corporate strategy, business strategy, driving forces, key success factors, value chain analysis, economies of scope, core competencies and sustainable competitive advantage.
4. To significantly enhance applied business research skills using primary data sources eg Stats Canada, US Census Bureau and enhance presentation skills.
5. Develop an understanding of the cross-functional and interdependent nature of strategic business decisions.

Required/Optional Materials & Prices

Title of Textbook

- The final exam is based on the textbook theories and concepts
- You may buy a used textbook: 10th edition through 14th edition is acceptable

Title of Textbook

Michael A. Hitt, R. Duane Ireland and Robert E. Hoskisson, 14th Edition
ISBN: 9780357716878 $79.95

Textbook (s) available at the Campus Store in Nideyinàn or order online for pick up: https://carletonshop.ca/Course/term

Grading Scheme

3 assignments @5% each – individual grade: 15%
Verbal group presentation – individual grade: 15%
Final group written report- individual grade: 15%
Final group written report – group grade: 15%
FINAL EXAM – individual – closed book: 25%
Attendance - library session & 4 PPT @ 2% each: 10%
AOL individual evaluation assignment: 5%
TOTAL: 100%
Automatic failure: Failure to write the final exam, or failure to present by any individual or failure to submit the presentation slides and final report, will result in an automatic failure of the course (an "F" grade).

Requests for substitute deliverables will be denied.

BUSI 4609 E (Monday) Class Schedule

Week	Date	Content and Assignments
1	Sept. 14	Review syllabus and course expectations Review STUDENT GROUPS Lecture: Introduction to Strategy
2	Sept. 21	Subject: library business and statistics database tutorial Read: https://library.carleton.ca/research/course-guides/busi-4609 IN PERSON ONLY in LIBRARY – NOT ZOOM ATTENDANCE MANDATORY – 2% of final grade
3	Sept. 28	Subject: External Environment: Macro & Industry Structural analysis

		Read: HIH chapters 1-2 Review A#1 requirements
4	Oct. 5	Subject: Internal Environment - Value Creation Chain & Competitor Analysis Read: HIH chapter 3 DUE: ASSIGNMENT #1
5	Oct. 12	Statutory holiday - University closed (no class)
6	Oct. 19	Subject: Intro to Corporate Strategy Read: HIH chapters 6-9 Return A#1 to students Review A#2 requirements
7	Oct. 26-30	Fall Break
8	Nov. 2	Subject: Business Strategy Read: HIH chapters 4-5 DUE: ASSIGNMENT # 2
9	Nov. 9	Subject: Corporate Strategy – Geographic Diversification Return A#2 to students
10	Nov. 16	FINAL Exam (in class) DUE: ASSIGNMENT #3
	Nov 21	1:00pm: AoL exam is scheduled to be held in-person.
11	Nov. 23	Group presentations (slots 1-3) The possible dates are November 20 (Friday) evening, anytime on November 21 (Saturday), or November 22 (Sunday). Once Scheduling and Examination Services confirms the date, we will inform you.
12	Nov. 30	Group presentations (slots 4-6)
13	Dec. 7	Group presentations (slots 7-9)
14	Dec. 11	Group presentations (slots 10-12)

APPLIED STRATEGY RESEARCH PROJECT

This is an extremely demanding course. Students are required to complete an extensive applied empirical business research project for this course. Students will form groups of four ie 4 students MAXIMUM, select a publicly traded company on the US or the Toronto stock exchanges, research the company and its competitive environment, and develop a strategic analysis. The following overview serves as an introduction to the project and covers these topics:

- Library research services
- Group selection guidelines
- Company selection guidelines
- Feedback and communication with professor

Library Research Services

Matt Gertler, Business, Economics, and Government Information Librarian, and Betsy Schuurman, Business and Government Information Technician, provide support for students in finding and using business and government information required for this course.

Supports include:

- Get help at drop-ins for finding data, including using Bloomberg Professional and other business databases, in the Computer Lab (Room 103 on the first floor of the Library near the tunnel entrance). There are 8 Bloomberg Professional terminals in the Computer Lab. Drop-ins are scheduled for every weekday (Monday – Friday) from 2-4pm until Winter Break. Check the schedule on the Library website [url: https://library.carleton.ca/].

- Students can email business.library@carleton.ca at anytime with questions about finding data for your assignment.
- Students can schedule one-on-one or group consultations in the Computer Lab or virtually by appointment by using Betsy's Booking page [url: https://outlook.office.com/bookwithme/user/717f84025c0540ea9baa4f74193b5f83@cunet.carleton.ca?anonymous&ismsaljsauthenabled&ep=plink].

The volume of information available can be overwhelming. The Library course guide and tutorial cover several of the databases available to support your research and will help you access those resources most likely to be useful to your research. This course discourages the use of data aggregators found online through Googling and AI. This includes sources like Statista, Trading Economics, and Macrotrends as well as AI generated content. Attending Library sessions and getting help from Library staff will help you learn how to find reliable empirical data. Library staff will help you learn how to access information using the top recommended sources for the assignment – government, public company information, major consulting / accounting firms, reputable business media, and legitimate business research databases accessible through the Library website [url: https://library.carleton.ca/].

The Business and Economics Librarian at the MacOdrum Library has prepared an intensive tutorial for the second week of class. Attendance at this class is a mandatory requirement for this course, for without this training, it will be difficult for you to undertake the required research and you will not be able to fulfill your obligations to your project team. This compulsory class provides an excellent overview of the significant subscription database resources available to you as a student at Carleton University. Students are strongly encouraged to review the BUSI 4609 course guide [url: https://library.carleton.ca/guides/course/busi-4609], available on the Library website, as well as the Library Resources module on your course Brightspace prior to the second week of class.

Group Selection Guidelines

The Sprott School of Business encourages group assignments in the school for several reasons. Before embarking on a specific problem as a group, it is your responsibility to decide which member is responsible for which section of the research.

Students will self-organize themselves into groups of four (4) maximum. Groups will be finalized during the first class; it is highly recommended that you organize your team prior to start of term. Groups of 4 or 3 or 2 or 1 are acceptable. Groups of 5 or more are unacceptable.

Each term, some groups experience conflict concerning the relative contribution of each student. Try to resolve it amongst yourselves. You are about to enter the business or professional world where you are responsible for your own choices and decisions. When conflict cannot be resolved, I will split the group into two groups – each of which will continue to analyze the firm originally selected.

Company Selection Guidelines

It is the responsibility of the student group to select the business firm that will be the basis of the assignments and comprehensive strategic analysis. It is the students' responsibility to undertake the preliminary research necessary to determine if sufficient information is available on the company. The selection of a business firm is an assurance – by the students to the professor – that there is sufficient information available to complete the assignments and strategic analysis.

Firm selection must be authorized by the professor, to ensure that two groups do not select the same business firm or an ineligible firm. Authorization by the professor is not a guarantee that there is sufficient information. Should it subsequently become apparent that there is insufficient information to adequately complete the assignments, it is the students' responsibility to select a new firm and obtain authorization to make the change. The students may change the selection of the business firm at any time prior to the due date of the first assignment but must receive the necessary approval.

Although a firm that the student has selected in another course is eligible for the capstone project, you are reminded it is a violation of academic plagiarism policy to submit substantially the same analysis for two courses.

Requirements and suggestions for firm selection:

- No two groups may select the same business firm in the same course section
- Any firms analyzed by other groups for 4609 over the past 24 months are NOT eligible. A list of such ineligible firms will be posted to Brightspace.
- Firms must be publicly listed on a major Canadian or United States stock exchange (i.e., TSX, NYSE, NASDAQ) for at least the past three years, with a minimum of three years financial statements available
- Government departments, agencies & crown corporations are NOT eligible
- Not-for-profit organizations (NGOs) are NOT eligible for selection
- Bankrupt, delisted firms, privately held firms are NOT eligible
- Firms analyzed in other previous courses by a student is eligible – provided that the student discloses this information to the professor in writing in the first assignment
- The ENTIRE firm MUST be analyzed – not a division or subsidiary, and must include all markets within which the firm operates (i.e., diversified multinationals should be avoided)
- Avoid large, multinational conglomerates (e.g., Google, Apple, Facebook, Exxon, BP, Toyota, GE, Disney), as they are too complex
- Avoid firms doing substantial business around the world (e.g., Exxon, BP, Shell, McDonalds, Starbucks), as they are too complex
- Avoid very small firms (e.g., less than 1000 employees), as insufficient information to complete a full strategic analysis

Data Reliability

You will be required to use data that is reliable. Therefore, you MUST use the audited annual report of the publicly traded company selected. You will also use data produced by government departments and agencies such as Stats Canada, Bank of Canada, the US Bureau of Economic Analysis, or US Federal Reserve FRED or US Department of Energy.

You will also use published reports by the international consulting firms eg Deloitte, KPMG, McKinsey, BCG, Mercer, Gartner.

Data Normalization and Comparison

Strategic analysis involves substantial sustained COMPARISON of data that MUST be normalized to allow accurate comparability. For example, an analyst does not compare actual GDP of the US to actual Canadian GDP because US GDP is much larger as the US population is much larger. Instead, we compare GDP per capita to normalize the data and allow comparison that controls for size differences. Ratios and per capita numbers are normalized metrics.

***Refer to Academic Calendar for dates University Closed Dates and Holidays https://calendar.carleton.ca/academicyear/**

Late Assignments:

Must request and arrange with course instructor

Final Exam

No waivers or substitutes permitted.

Deferred final exams:

If you wish to defer a **Formal Final Exam**, you – the student – must reach out to the registrar's office with the proper documentation prior to the deadline (please refer to https://carleton.ca/registrar/deferral/ for dates). Once the request has been put through, your instructor will be notified for their approval.

Use of Generative Artificial Intelligence

AI use in this course varies by assignment. Some activities will explicitly invite you to use AI tools; others will require work completed independently. Please read each assignment's instructions carefully for permitted and prohibited uses. When AI is used, be transparent about how you used it and apply critical judgment to verify its accuracy and relevance.

Contribution to Learning Goals of the Program (BCom, BIB):

Program Learning Goal	**Competencies Not Covered**	**Competencies Introduced (only)**	**Competencies Taught But Not Assessed**	**Competencies Taught and Assessed**
	CHECK (X) ONE PER ROW			
BC1 Knowledge *Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.*				**x**
BC2 Collaboration *Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.*			**x**	
BC3 Critical Thinking *Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases*				**x**

and assumptions, and draw conclusions based on analysis and evaluation.				
BC4 Communication *Graduates will be effective and persuasive in their communications.*				**x**
BI5 Global Awareness (BIB ONLY) *Graduates will be globally-minded.*	**x**			

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 anyone 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 in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership, and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/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.

Grading

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
A = 85-89	B = 73-76	C = 63-66	D = 53-56
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52

F = Below 50

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:

http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/

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).

Pregnancy Accommodation

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, please review the pregnancy academic accommodation process.

Religious obligation
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, please review the religious academic accommodation process.

Academic Accommodations for 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. For more details, visit the Paul Menton Centre website.

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 where 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 the Equity and Inclusive Communities website.

Accommodation for Student Activities
Carleton University recognizes the substantial benefits, both to the individual student and for the university, that result from a student participating in activities beyond the classroom experience. Reasonable accommodation must 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. For more details, see the Senate Policy on Accommodation for Student Activities (PDF, 25 KB).

Academic Consideration for Medical and Other Extenuating Circumstances

Due to medical and other extenuating circumstances, students may occasionally be unable to fulfil the academic requirements of their course(s) in a timely manner. The university supports the academic development of students and aims to provide a fair environment for students to succeed academically. Medical and/or other extenuating circumstances are circumstances that are beyond a student's control, have a significant impact on the student's capacity to meet their academic obligations, and could not have reasonably been prevented. Students may request Academic Consideration for Coursework or Other Academic Deliverable. For further information please review the Procedure for Academic Consideration and the FAQ page.

Scheduling and Examination Support

Scheduling and Examination Services provides various supports for both in-term and end-of-term tests and exams. Details can be found on the Exam Support website.

Academic Integrity

Violations of academic integrity are a serious academic offence. 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 – weaken the quality of the degree and will not be tolerated.

Process: If an alleged violation occurs, all relevant documentation will be forwarded to the Dean. If the allegation proves true, the 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. **For a first offence, at a minimum, the penalty assigned will normally be a zero on the submitted work and at least a minimum full grade reduction of the final course grade. For a second offence, at a minimum, the penalty assigned will normally lead to a suspension from studies.**

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/.

Sprott Student Services

The Sprott Undergraduate Student Services Office offers program advising and overall student success support. Our team is available to discuss your academic goals and your program progression plans. We can also work with you to develop strategies for success, including study skills for Business. If you experience any difficulty this term or if you would like to access support, please contact our team at academicadvising@sprott.carleton.ca .

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: carleton.ca/csas.

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 may wish to do so by visiting https://carleton.ca/its/get-started/new-students-2/
