



**CARLETON UNIVERSITY SPROTT
SCHOOL OF BUSINESS
BUSI4400 /SECTION A
2014-15/FALL
IS STRATEGY, MANAGEMENT AND ACQUISITION**

Instructor: Dr. Shaobo Ji
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TA: TBD
Office Hours: TBA
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Course meets: Tuesdays 11:35 – 14:25 (first class starts on Tues. Sept. 9, 2014)

Pre-requisites & precluded Courses: fourth-year standing, BUSI 2400 and BUSI 3103 with a grade of C- or higher in each.

Calendar description:

BUSI 4400 [0.5 credit] Comprehensive treatment of current trends and management issues associated with information systems within organizations of local, national and international scope. Issues and techniques of information systems planning, administration, resource management and new technology adoption. Case studies are used.

ACM/AIS description: This course explores the issues and approaches in managing the information systems function in organizations and how the IS function integrates / supports / enables various types of organizational capabilities. It takes a senior management perspective in exploring the acquisition, development and implementation of plans and policies to achieve efficient and effective information systems. The course addresses issues relating to defining the high-level IS infrastructure and the systems that support the operational, administrative and strategic needs of the organization. The remainder of the course is focused on developing an intellectual framework that will allow leaders of organizations to critically assess existing IS infrastructures and emerging technologies as well as how these enabling technologies might affect organizational strategy. The ideas developed and cultivated in this course are intended to provide an enduring perspective that can help leaders make sense of an increasingly globalized and technology intensive business environment.

Course Description and Objectives:**Learning objective**

Students will learn to

1. Understand the various functions and activities within the information systems area, including the role of IT management and the CIO, structuring of IS management within an organization, and managing IS professionals within the firm.
2. View an organization through the lens of non-IT senior management in deciding how information systems enable core and supportive business processes as well as those that interface with suppliers and customers.
3. Understand the concepts of information economics at the enterprise level.
4. Appreciate how IS represents a key source of competitive advantage for firms.
5. Structure IS-related activities to maximize the business value of IS within and outside the company.
6. Understand existing and emerging information technologies, the functions of IS and its impact on the organizational operations.
7. Evaluate the issues and challenges associated with successfully and unsuccessfully incorporating IS into a firm.
8. Understand how strategic decisions are made concerning acquiring IS resources and capabilities including the ability to evaluate the different sourcing options.
9. Apply information to the needs of different industries and areas.
10. Understand the role of IT control and service management frameworks from the perspective of managing the IS function in an organization.

Topic

1. The IS function
2. IS strategic alignment
3. Strategic use of information
4. Impact of IS on organizational structure and processes
5. IS economics
6. IS planning
7. Role of IS in defining and shaping competition
8. Managing the information systems function
 - a. IS leadership: The role of the CIO and IS management
 - b. Structuring the IS organization
 - c. Hiring, retaining, and managing IS professionals
 - d. Managing a mixed set of internal and external resources
 - e. Determining staffing skills allocation models
9. Financing and evaluating the performance of information technology investments and operations

10. Acquiring information technology resources and capabilities
 - a. Acquiring infrastructure capabilities
 - b. Sourcing information systems services
 - c. Sourcing information systems applications
11. Using IS/IT governance frameworks
12. IS risk management
 - a. Managing business continuity
 - b. Managing security and privacy

Reading (s)/Textbook (s):

Robert D. Austin, Richard L. Nolan, Shannon O'Donnell (2009), *The Adventures of An IT Leader*, Boston, MA: Harvard Business Press. (ISBN: 9781422146606). Additional readings are listed below and included in the course schedule.

List of reading:

1. Andriole, S. J. (2010) Business impact of Web 2.0 technologies, *Communications of the ACM*, 53(12), pp.67-79.
2. Carr, N.G. (2003) IT doesn't matter, *Harvard Business Review*, May, pp.41-49.
3. Carter, M., Gover, V., and Bennett, J. (2011) The emerging CIO role of business technology strategist, *MIS Quarterly Executive*, 10(1), pp. 19-29.
4. Culnan, M.J., McHugh, P. J., and Zubillaga, J. I. (2010) How large U.S. companies can use Twitter and other social media to gain business value, *MIS Quarterly Executive*, 9(4), pp. 243-259.
5. DiRomualdo, A. and Gurbaxani, V. (1998) Strategic intent for IT outsourcing, *Sloan Management Review*, 39(4), Summer, pp.67-80.
6. Farrell, D. (2003) The real new economy, *Harvard Business Review*, October, pp. 104-112.
7. Galup, S., Dattero, R., Quan, J., Conger, S. (2009) An Overview of IT Service Management, *Communications of the ACM*, Vol. 52, No. 5, pp. 124-127.
8. Iyer, B. and Henderson, J.C. (2010) Preparing for the future: understanding the seven capabilities of cloud computing, *MIS Quarterly Executive*, 9(2), pp. 117-131.
9. Jarvenpaa, S.L. and Tuunainen, V.K. (2013) How Finnair socialized customers for service co-creation with social media, *MIS Quarterly Executive*, 12(3), pp. 125-136.
10. Kappelman, L., McLean, E., Luftman, J., and Johnson, V. (2013) Key Issues of IT Organizations and Their Leadership: The 2013 SIM IT Trends Study, *MIS Quarterly Executive*, 12(4), pp. 227-240.
11. Kayworth, T. and Whitten, D. (2010) Effective information security requires a balance of social and technology factors, *MIS Quarterly Executive*, 9(3), pp. 163-175.

12. Lee, J.N., Huynh, M. Q., Kwok, R.C.W., Pi, S. M. (2003) IT Outsourcing Evolution- Past, Present, and Future, Communications of the ACM, May, 46(5), pp. 84-89.
13. Markus, M. L. and Benjamin, R. I. (1997). The magic bullet theory in IT-enabled transformation, Sloan Management Review, 38(2), pp. 55-68.
14. McAfee, A. and Brynjolfsson, E. (2008) Investing in the IT that makes a competitive difference, Harvard Business Review, July-August, pp. 98-107.
15. Mitra, S., Sambamurthy, V., and Westerman, G. (2011) Measuring IT performance and communicating value, MIS Quarterly Executive, 10(1), pp. 47-59.
16. Nelson, R.R. and Morris, M.G. (2014) IT project estimation: contemporary practices and management guidelines, MIS Quarterly Executive, 13(1), pp. 15-30.
17. Peppard, J., Edwards, C., and Lambert, R. (2011) Clarifying the ambiguous role of the CIO, MIS Quarterly Executive, 10(1), pp. 31-44.
18. Tallon, P.P, Short, J.E., and Harkins, M.W. (2013) The evolution of information governance at Intel, MIS Quarterly Executive, 12(4), pp. 189-198.
19. Weill, P. and Woerner, S. (2013) The future of the CIO in a digital economy, MIS Quarterly Executive, 12(3), pp. 65-75.
20. Weitzel, T., Echhardt, A., and Laumer, S. (2009) A framework for recruiting IT talent: lessons from Siemens, MIS Quarterly Executive, 8(4), pp. 175-189.
21. Wixom, B.H., Yen, B., and Relich, M. (2013) Maximizing value from business analytics, 12(2), pp. 111-123.

Online resources: cio.com; ebusiness.mit.edu; ted.com; wired.com

Course Requirements & Methods of Evaluation:

The course will primarily be based around cases and readings from the textbook as well as other sources that illustrate key issues in information systems strategy, management and acquisition. Students will be expected to actively participate in the discussions and all class activities. The final course grade will be determined as follows:

TYPE	%
1. Assignment	25%
2. Class participation and presentation	25%
3. Final examination	20%
4. Term project	30%
Total	100%

Class participation and presentation (25%):

Participation by students in class discussion and activities is an important part of this course. Effective participation is possible only by regular class attendance, active pre-class preparation, and online contributions as required. You should read the required case and readings before coming to class. You will not gain participation marks simply by asking an obligatory question or two. Nor will such marks be based on the number of questions or comments made. Participation and presentation grades (20% for participation and 5% for class paper presentation) will reflect the total impact the student has had on the class over the term, through significant and insightful comments, and a demonstration of good problem-solving and analytical skills. Each student will present a paper (from reading list) and present it to the class (5%).

Assignment / Case write-up (25%) (weekly between week 2 and week 11)

As part of the learning experience in this course we will analyze cases included in the textbook (the textbook is a collection of 18 mini-cases). Each student will be required to submit a total of ten (10) individual case write-ups, with each consisting of two (2) pages of four (4) questions which will be assigned throughout the term. The deadline for each assignment is midnight, Mondays. Submission should be done online and by email. There will be no make-up for those missed.

Term Project (30%)

Each student is required to conduct a case study of an information system in an organization of her/his choice. The case study should focus on a particular issue or theme related to the implementation or use of a system. Issues include IS strategic planning, IT governance, IT project management, IT service management, IT and change management, post implementation performance review, training, among others. Students are required to conduct background research and interview at least three people in an organization regarding the issue of interest. Ideally interviews should be conducted with both IT and business personnel. Each student will prepare a write-up of the case consisting of no more 5000 words. Students will then make a presentation of their case studies to the entire class at a time to be assigned. The case studies should be analytical and go beyond a mere description of the situation in the organizations. They should emphasize the issues of IS strategy, management, and acquisition being tackled and include recommendations on how key challenges or opportunities might be addressed. For choice of topics, please refer to Learning Objective and Topic section of this document.

Project deliverables:

Deliverables for the term project include the following: a project proposal, project report, and project presentation.

- a. The proposal should provide a brief background (1 page) on the issue that has been assigned. It should contain the following: a title for the project, background and rationale, possible sources of information and resources that may be needed, and a project schedule. I will review each project proposal. The proposals must be submitted by the third class meeting.
- b. The project report should be constructed as a business report. It should have a title page, an executive summary page, a table of contents and figures, the report itself,

- and appropriate appendices and illustrations. It should not be more than 5000 words in length, excluding appendices and illustrations.
- c. Each student will give an in-class presentation of its project lasting no more than 10 minutes. This will consist of 8 minutes for the actual presentation and 2 minutes for questions. The limited presentation time makes it imperative for the students to organize what is to be presented. Visual aids should be used to enliven the presentations. However, these must be well designed and clear.
 - d. The project submitted should be original work. A student that submits a project that is not original work will get a final class grade of Zero (0) and be subject to university policy regarding instructional offenses.

Summary of Term Project Deliverables

	Deliverable	Submit to	Due Date
1	Project Proposal	Professor	September 23, 2014 (3 rd week of class)
2	Final Project	Professor	December 2, 2014 (last week of class)
3	Project presentation	Professor	December 2, 2014 (last week of class)

Tentative Class Schedule

Date	Topic	Case/Activity	Reading	Assignment/Discussion
1.Sept. 9	<p>Introduction and Class Organization</p> <p>Key issues in information systems strategy, management and acquisition</p> <p>IT management and business: internal and external</p>	IVK-1: The new CIO	Kappelman, L., McLean, E., Luftman, J., and Johnson, V. (2013) Key Issues of IT Organizations and Their Leadership: The 2013 SIM IT Trends Study, MIS Quarterly Executive, 12(4), pp. 227-240.	<p>If you were Jim Barton, would you take the CIO job at IVK? Why? Why not? What would you want to know before you decide? If he accepts, what should he do first?</p> <p>Consider the exhibits at the end of IVK-1, what do they tell us about the company’s business situation (and about the situation Barton would take over as IVK’s CIO?)</p> <p>After searching on the words “IT management,” Barton writes on his whiteboard “IT management is about management.” What do you think Barton is trying to get at with this statement? Do you agree with the statement?</p> <p>In his google search, Barton comes across the statement: “more than any other group within a company, IT is</p>

Date	Topic	Case/Activity	Reading	Assignment/Discussion
				<p>positioned to understand the business end-to-end, across departmental boundaries...” Do you agree?</p> <p>Do you find the frameworks that Barton seems to like useful?</p> <p>What would be your best single piece of advice to Barton if he decides to take the job?</p>
2.Sept. 16	<p>Managing the information systems function</p> <p>IS leadership: The role of the CIO and IS management</p>	<p>IVK-2: CIO challenges</p> <p>IVK-3: CIO leadership</p>	<p>Carter, M., Gover, V., and Bennett, J. (2011) The emerging CIO role of business technology strategist, MIS Quarterly Executive, 10(1), pp. 19-29.</p> <p>Peppard, J., Edwards, C., and Lambert, R. (2011) Clarifying the ambiguous role of the CIO, MIS Quarterly Executive, 10(1), pp. 31-44.</p> <p>Weill, P. and Woerner, S. (2013) The future of the CIO in a digital economy, MIS Quarterly Executive, 12(3), pp. 65-75.</p>	<p>Refer to assignment schedule.</p>
3.Sept. 23	<p>IT cost and value</p> <p>Role of IS in defining and shaping competition</p>	<p>IVK-4: the cost of IT</p>	<p>McAfee, A. and Brynjolfsson, E. (2008) Investing in the IT that makes a competitive difference, Harvard Business Review, July-August, pp. 98-107.</p>	<p>Refer to assignment schedule.</p>

Date	Topic	Case/Activity	Reading	Assignment/Discussion
4.Sept. 30	IS Economics Financing and evaluating the performance of information technology investments and operations	IVK-5: the value of IT	Carr, N.G. (2003) IT doesn't matter, Harvard Business Review, May, pp.41-49. Farrell, D. (2003) The real new economy, Harvard Business Review, October, pp. 104-112.	Refer to assignment schedule.
5.Oct. 7	Measuring IT performance Acquiring information technology resources and capabilities – Building IT capabilities	IVK-6: Project Management IVK-7: The Runaway Project	Mitra, S., Sambamurthy, V., and Westerman, G. (2011) Measuring IT performance and communicating value, MIS Quarterly Executive, 10(1), pp. 47-59. Nelson, R.R. and Morris, M.G. (2014) IT project estimation: contemporary practices and management guidelines, MIS Quarterly Executive, 13(1), pp. 15-30.	Refer to assignment schedule.
6.Oct. 14	Using IS/IT governance framework Governing and aligning the information systems with organization business goals	IVK-8: IT Priorities IVK-9: IT and the board of directors IVK-16: Standardization and innovation	Tallon, P.P, Short, J.E., and Harkins, M.W. (2013) The evolution of information governance at Intel, MIS Quarterly Executive, 12(4), pp. 189-198.	Refer to assignment schedule.
7.Oct. 21	IS risk management a. Managing business continuity b. Managing security and privacy	IVK-10: Crisis IVK-11: Damage IVK-12: Communication IVK-17: Managing risk	Kayworth, T. and Whitten, D. (2010) Effective information security requires a balance of social and technology factors, MIS Quarterly Executive, 9(3), pp. 163-175.	Refer to assignment schedule.
8. Nov. 4	IT and organization: communication,	IVK-13: Emerging	Andriole, S. J. (2010) Business impact of Web 2.0 technologies, Communications of the ACM, 53(12), pp.67-79.	Refer to assignment schedule.

Date	Topic	Case/Activity	Reading	Assignment/Discussion
	collaboration, sharing, and collective action Managing emerging technology Web 2.0 and social media Big data and business analytics	technology	Culnan, M.J., McHugh, P. J., and Zubillaga, J. I. (2010) How large U.S. companies can use Twitter and other social media to gain business value, MIS Quarterly Executive, 9(4), pp. 243-259. Jarvenpaa, S.L. and Tuunainen, V.K. (2013) How Finnair socialized customers for service co-creation with social media, MIS Quarterly Executive, 12(3), pp. 125-136. Wixom, B.H., Yen, B., and Relich, M. (2013) Maximizing value from business analytics, 12(2), pp. 111-123.	
9. Nov. 11	Acquiring information technology resources and capabilities a. Acquiring infrastructure capabilities b. Sourcing information systems services c. Sourcing information systems applications Procurement	IVK-14: Vendor partnering	Lee, J.N., Huynh, M. Q., Kwok, R.C.W., and Pi, S. M. (2003) IT Outsourcing Evolution- Past, Present, and Future, Communications of the ACM, May, 46(5), pp. 84-89. DiRomualdo, A. and Gurbaxani, V. (1998) Strategic intent for IT outsourcing, Sloan Management Review, 39(4), Summer, pp.67-80. Iyer, B. and Henderson, J.C. (2010) Preparing for the future: understanding the seven capabilities of cloud computing, MIS Quarterly Executive, 9(2), pp. 117-131.	Refer to assignment schedule.
10. Nov. 18	Impact of IS on organizational structure and processes Managing the information systems function a. Structuring the IS	IVK-15: Managing talent	Markus, M. L. and Benjamin, R. I. (1997). The magic bullet theory in IT-enabled transformation. Sloan Management Review, 38(2), pp. 55-68. Weitzel, T., Echhardt, A., and Laumer, S. (2009), A framework for recruiting IT talent: lessons from Siemens, MIS Quarterly Executive, 8(4), pp. 175-189.	Refer to assignment schedule.

Date	Topic	Case/Activity	Reading	Assignment/Discussion
	organization b. Hiring, retaining, and managing IS professionals c. Managing a mixed set of internal and external resources d. Determining staffing skills allocation models			
11. Nov. 25	ITSM and other topics Course wrap-up Project Presentations	IVK-18: Looking forward	Galup, S., Dattero, R., Quan, J., Conger, S. (2009) An overview of IT service management, Communications of the ACM, Vol. 52, No. 5, pp. 124-127. Individual term project presentation	Refer to assignment schedule.
12. Dec. 2	Project Presentations Final review	Presentation	Individual term project presentation	All Projects Documents Due Today
TBD	Final Examinations			

*Tentative, may be adjusted based on guest speaker's availability.

FND:

To reduce instances of miscommunication Carleton introduced a grade FND (Failure with No Deferral) to be assigned to students who fail to meet the minimum in-term performance standards explicitly set out in the outline and applied consistently (i.e., there is no other hidden criteria).

Please include something along the following in the course outline (note this is only an example...you can determine your own criteria for satisfactory in-term performance):

Satisfactory In-term Performance

1. Unless otherwise stated below in item #2, the requirement for Satisfactory In-term Performance is set at 50% of all, not each, pre-final term work (i.e. assignments, participation marks, tests etc.).
2. The criterion/criteria and the standard(s) for Satisfactory In-term Performance are as follow(s):
 - a. Assignments – less than 50%
 - b. Class participation and paper presentation – less than 50%
3. Unsatisfactory In-term Performance in this course will lead to failure in this course (regardless of the performance at the Final exam or final project) **Yes**
FND grade in this course (in case of missed Final exam and/or project) **Yes**

Required calculator in BUSI course 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 in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship 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.

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	WDN = Withdrawn from the course		
ABS = Student absent from final exam			
DEF = Deferred (See above)			
FND = (Failed, no Deferred) = Student could not pass the course even with 100% on final exam			

Academic Regulations, Accommodations, Etc.

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 Accommodations

Academic Accommodations for Students with Disabilities

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or pmc@carleton.ca for a formal evaluation. If you are already registered with the PMC, contact your PMC coordinator to send me your *Letter of Accommodation* at the beginning of the term, and 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 me to ensure accommodation arrangements are made. Please consult the PMC website for the deadline to request accommodations for the formally-scheduled exam (*if applicable*).

- The deadlines for contacting the Paul Menton Centre regarding accommodation for final exams for the December 2014 exam period is November 7, 2014.

For Religious Obligations:

Students requesting academic accommodation on the basis of religious obligation should make a formal, written request to their instructors for alternate dates and/or means of satisfying academic requirements. Such requests should be made during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist, but no later than two weeks before the compulsory event.

Accommodation is to be worked out directly and on an individual basis between the student and the instructor(s) involved. Instructors will make accommodations in a way that avoids academic disadvantage to the student.

Students or instructors who have questions or want to confirm accommodation eligibility of a religious event or practice may refer to the Equity Services website for a list of holy days and Carleton's Academic Accommodation policies, or may contact an Equity Services Advisor in the Equity Services Department for assistance.

For Pregnancy:

Pregnant students requiring academic accommodations are encouraged to contact an Equity Advisor in Equity Services to complete a letter of accommodation. The student must then make an appointment to discuss her needs with the instructor at least two weeks prior to the first academic event in which it is anticipated the accommodation will be required.

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. Penalties may include expulsion; suspension from all studies at Carleton; suspension from full-time studies; a refusal of permission to continue or to register in a specific degree program; academic probation; and a grade of Failure in the course, 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 <http://www2.carleton.ca/sasc/advisingcentre/academic-integrity/>.

Assistance for Students:

Student Academic Success Centre (SASC): www.carleton.ca/sasc

Writing Tutorial Services: <http://www1.carleton.ca/sasc/writing-tutorial-service/>

Peer Assisted Study Sessions (PASS): www.carleton.ca/sasc/peer-assisted-study-sessions

Important Information:

- Students must always retain a hard copy of all work that is submitted.
 - All final grades are subject to the Dean's approval.
 - Please note that you will be able to link your CONNECT (MyCarleton) account to other non-CONNECT accounts and receive emails from us. However, 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 CONNECT address. Therefore, it would be easier to respond to your inquiries if you would send all email from your connect account. If you do not have or have yet to activate this account, you may wish to do so by visiting <https://portal.carleton.ca/>
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