



**Carleton University
Strategic Management
BUSI 4609 Section A - Fall 2017**

- Instructor:** Cheryl Volesky
Email: cheryl.volesky@carleton.ca
- Class Schedule:** Monday 8:30-11:30 (Section A) Southam 415
First Class will be in the Library Room 252
- Office Hours:** Available for consultation after class in Dunton 1009A. Additional hours provided according to need – high level of email and phone support
- Required Text:** Hitt, Ireland & Hoskisson, *Strategic Management Competitiveness & Globalization*, 12th Ed. (concepts only – in paperback) Cengage Learning, ISBN 13: 978-1-305-50 - 220-8
- Prerequisites:** Fourth-year standing in B.Com concentrations except International Business, which requires BUSI 4709; and successful completion of all 2000 and 3000 level courses in the major requirement. Sprott enforces all prerequisites. It is the student's responsibility to ensure that the prerequisite requirements are met. Failure to meet the prerequisites may result in your deregistration from this course any time into the term.

CALENDAR DESCRIPTION (from Carleton University's Undergraduate Calendar)

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

COURSE DESCRIPTION

Strategic Management is the business school's capstone course completed in the final (4th) year of study in the undergraduate program. It focuses on strategy making in "for profit" business corporations. Students are expected to determine and evaluate environmental opportunities and threats in light of a selected firm's strengths and weaknesses in its value chain in order to enhance its core competencies and develop and maintain a sustainable competitive advantage by creating value for its customers. Emphasis is on corporate and business level strategic analysis, strategy formulation and implementation which enhances value creation for stakeholders and potentially leads to higher market share and profitability. The course serves to integrate and synthesize knowledge acquired in the functional disciplines in a business school by application of acquired functional skills to corporate and business strategic analysis. The capstone course is similar to the Honours dissertation course in other social science departments (e.g. political science). Students are expected to carry out very extensive empirical business research for this course using government databases such as Statistics Canada, US Census Bureau, IMF, and OECD as well as private databases such as Bloomberg, EIU, Mergent, Factiva, and Business Source Premier. Students must select an approved, "for profit" business firm, research the firm, perform a complete strategic analysis and develop and present a strategy for the firm.

COURSE 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 previously taken business courses by applying those functional skills to analyse a firm and recommend appropriate strategies.
3. To significantly enhance presentation skills and applied business research skills through empirical business research.

APPLIED BUSINESS RESEARCH

This is an extremely demanding course. You are required to complete very extensive applied empirical business research for this course. You must select a “for profit” business firm, research the firm and develop a strategic analysis of **approximately** 150 pages (length will vary according to the complexity of the industry and the firm) in conjunction with no more than three other students. Assignments, presentations or final reports that do not include substantial data and metrics will receive lower grades – including failure.

The Carleton University Library has prepared an intensive tutorial for the first class. Attendance at this class is a **mandatory requirement** for this course (it also gets you a participation grade of 1%) as without this training, it will be nearly impossible for you to do 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 electronic database resources available as part of your tuition fees: <http://www.library.carleton.ca/research/course-guides/busi-4609>
The Carleton Library subscribes to the following electronic databases which may be useful for your research:

Bloomberg – useful for financial information – there are 6 dedicated terminals on the main floor in the library – there is no remote access

Factiva, Business Source Premier, Economist Intelligent Unit (EIU), Print Measurement Bureau, GMID
Global Competitiveness Report

Statistics Canada, US Census Bureau, US Bureau of Economic Analysis, Eurostats

Data produced by Governmental Departments and Agencies from OECD countries (e.g. Canada, USA, UK) such as Stats Canada or the US Department of Energy.

Data produced by International Governmental Organizations (IGOs) such as International Monetary Fund (IMF), World Trade Organization (WTO), International Energy Agency (IEA), World Bank, & UN agencies

Canadian & US Government Department publications, studies, research reports

Think tank studies e.g. CD Howe, MLI

International Consulting firms studies e.g. McKinsey, Deloitte

Legal documents such as audited financial statements, disclosure documents filed with the SEC or OSC or similar regulatory bodies.

You are also expected to read recent business media articles e.g. Financial Post, Wall Street Journal, Financial Times, Reuters, Bloomberg, Globe and Mail, Economist, New York Times, Washington Post, concerning economic, political, technological trends, the firm, competitors and the industry you select.

The Library provides access to each of these resources at:

<http://www.library.carleton.ca/research/course-guides/busi-4609/business-news>

You are strongly discouraged from using data from advocacy groups, unions or business associations as they are not neutral but rather they are advocacy groups trying to persuade the public of decision makers of their positions. Consequently, their data is often unreliable as it may be skewed to support their positions.

You will also use data produced by corporations that are considered to be “legal documents” e.g. audited financial statements, disclosure documents filed with the SEC or OSC or similar regulatory bodies. Every section of your assignments, presentation and final report must include metrics and **empirical normalized** data to support what you are arguing throughout (this includes the referencing of all charts and graphs by using footnotes - there is a function for doing this in Microsoft Word under the reference tab). Strategic analysis involves substantial data comparisons that must be normalized to allow for comparison that account for size differences between firms. For example, ratios and per capita numbers are normalized metrics.

STUDENT DELIVERABLES ARE AS FOLLOWS:

Students will assign themselves to groups of **no more than four from the same section of the course**. Select group members who have similar goals in terms of achievement and construct a group contract. Each group must select an eligible (refer to ineligible list on cuLearn) **"for profit" publically traded business firm** (Crown corporations like VIA are **not** acceptable choices) having a **minimum of four years of full financial statements**. Remember that private firms are not legally required to make their financial statements public. Also verify that some (at least three) of the major competitors also meet the same requirements. Why? High availability of information makes the project easier to complete. This information will be the basis for the assignments, presentation and final report as follows:

1. Each group will prepare three assignments worth 5% each. Label sections with the name(s) of the person(s) who contributed to that section. The three assignments represent the first draft of your final case study report (consult rubric and instructions on cuLearn). An academic integrity form should be included. **Poorly written and edited papers may receive a deduction of up to twenty percent. Each assignment must include an executive summary done by each student** as page 1 (**placed before TOC**). This means that a group of four will have four executive summaries. Why? This ensures that each group member contributes to and is aware of what is in the report. The executive summary is the single most important page in the report; **it must contain all the key findings of the report – and it must be free of spelling and grammar errors.** Please Note: An executive summary is **not** an introduction concerning what the paper will discuss.

2. Each group will make a twenty to twenty-five minute oral presentation (worth 10% of the final grade) to the class based on the research embodied in the three assignments with a heavy focus (approximately one-half of the time) on your recommendations and justification for them (including costs and benefits and a timeline for implementation). Each student must present. There will be an automatic 10% deduction for overtime presentations (best to plan for 20 minutes of talking – the question period after the presentation is not included in the time limit). The assigned mark will be based on the quality, effectiveness and professionalism of the presentation. NOTE: An Executive Summary with the highlights of your presentation must be provided to the professor (only) on the day of presentation. Each group must email the Powerpoint presentation to the professor the evening before the date of the presentation (by 6 pm). Each group must also print the PowerPoint slides (3 slides to a page to be given to the Professor only) when the presentation is given. Failure to make the presentation will result in an automatic course failure.

3. The final written capstone project report (worth 30%) (which will include only one well written group executive summary that will be one single spaced page long) must be submitted to the Instructor **7 days after the verbal presentation** in both hard and soft copy format (include also a word and PDF file which you have uploaded to cuLearn – please verify that it is readable and also include your Powerpoint slides). All files must be labelled with your company name appearing first in the file name followed by the year (for example: Tim Hortons 2017). The length of the written report depends on the firm chosen (remember in business, **brief is best** – papers that ramble or are repetitive will be penalized with lower grades). Failure to submit all required components will result in failure of the course.

4. There is an attendance, participation and professional conduct grade of ten percent:

First Class in the Library: 1% for attendance for the entire session

Second Class: 1% for submission of group contract and 1% for meeting minutes from this class

Fourth class in the Library: 1% for meeting minutes from this class

Four Days of Presentations: 1% each day

Professional Conduct and Participation - 2% (this grade may be adjusted downward due to unprofessional conduct such as coming to class late, working on non-course related material, texting and talking during presentations/lectures. Attendance will be verified at any point during the class (sometimes twice). You are expected to be present for the entire class not just for the roll call. You may forfeit your class participation marks if you are present for only part of the class.

5. There is also a mandatory multiple-choice exam (based on **both** the text book and the lectures) worth 35%. The weight of this exam is **not** negotiable and there are no make-up assignments. Please consider this when allocating time in this course.

GRADING SYSTEM

Three group assignments 3 @ 5% each	15%
Verbal case presentation	10%
Final Examination	35%
Attendance, Participation and Professional Conduct	10%
Final Written Case Report & the Executive Summaries.....	30%
TOTAL	100%

Any assignment that is late may be penalized at the discretion of the professor.

GRADING (All final grades are subject to the Dean's approval)

Criteria for Evaluation and Grading – Course Instructor Grades All Papers

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 since the US population is much larger. Instead, we compare GDP per capita to normalize the data and allow for comparisons that controls for size differences. **Ratios and per capita numbers are normalized metrics.** Also it is important to look at percentage growth or decline in many financial metrics. You must include these in your report.

Assignments, verbal presentations and the final capstone project report are evaluated and graded on a “relative” and not “absolute” scale. Each document is compared to other student case analyses in that class. Written comments are provided throughout the written assignments. In addition, rubrics and detailed instructions are supplied to assist you in the compilation of your reports and to justify my grading. Following instructions and the suggested format is highly recommended.

The assignments/presentations are graded based on the quality of critical thinking/strategic analysis, quality of written or verbal expression, quality of integration with course materials and ideas, and overall effectiveness. Those student analyses in the excellent category (the A's) are comparatively better than any of the other student analyses. Those student analyses in the “good” category (the B's), are comparatively less well written or logical or researched, relative to the excellent analyses, but are still of good quality. The student analyses in the “fair” category are of a comparative lower quality than student analyses in the “good” category. Finally, those case studies classified as “poor”, are usually poorly researched, poorly documented, poorly argued and poorly written. Marks on the initial assignments may or may not have any relationship to the final grade for the project. Typically students who take my feedback into consideration raise their grades on the final project.

Credibility in the business world is affected by the quality of both verbal and written expression. Consequently, written reports may be assessed a penalty of up to 20% if they contain significant formatting, spelling and/or grammatical errors. Please use “Print Preview” to ensure that charts and graphs are not divided over two pages and then convert document to a PDF before printing to ensure formatting remains unchanged.

Automatic Failure: Failure to write the final exam or return all examination materials to the instructor (signing in and out is required) or failure to submit the final report and presentation slides (paper & e-copy) will result in an automatic failure of the course (an “F” grade) and an FND grade (in case of missed Final exam or project).

CHANGE OF GRADE

Informal requests for grade increases **ARE ALWAYS** denied unless there has been a mathematical error. This course is fully transparent to anyone and considerable feedback is given to the student. All student deliverables are retained for one year i.e. exam, assignments, presentation slides and final report. The student may file an appeal of the final grade pursuant to university regulations. No professor can sit on the Appeal Committee of a student challenging the grade of that professor. I provide all documentation to the Appeal Committee.

Tentative Fall 2017 BUSI 4609 A Monday CLASS SCHEDULE*

Sept. 11 th	Report to library room 252 for course introduction and explanation of capstone project and library research session. <u>DO NOT MISS THIS CLASS – there are no make-up classes and groups of four will be formed for the capstone project!</u> Sign up for final presentations on a first come, first serve basis Print off ineligible list on culearn Review SWOT Analysis on your own (online lecture on cuLearn) Course Introduction and overview of External Analysis
Sept. 18 th	Report to the library room 481 (Activity Learning Centre) with your laptops. Be prepared to work on your external analysis (it should be well underway) Hand in your group contract and your meeting minutes at the end of the class. See group contract suggestions/sample on pages 13 & 14 of this course outline. Introduction to Corporate and Business Strategy Chapter 1 & 2: Strategic Management & the External Environment (PEST Analysis)
Sept. 25 th	Chapter 3 & 12: Internal Environment & Leadership Chapter 4: Business Level Strategy <u>ASSIGNMENT # 1 DUE</u>
Oct. 2 nd	Report to the library room 481 (Activity Learning Centre) with your laptops and be prepared to work on your internal analysis. You must hand in your meeting minutes by the end of the class.
Oct. 9 th	Thanksgiving Day – NO CLASS
Oct. 16 th	Chapter 5: Competitive Rivalry Chapter 6: Corporate Level Strategy <u>ASSIGNMENT #2 DUE</u>
Oct. 23 rd	BREAK WEEK
Oct. 30 th	Chapter 7: Corporate Strategy - Mergers & Acquisitions Chapter 8: Corporate Strategy - International Strategies Chapter 9: Cooperative Strategies
Nov. 6 th	<u>ASSIGNMENT # 3 DUE</u>
Nov. 13 th	FINAL EXAM
Nov. 20 th	4 Group Presentations
Nov. 27 th	4 Group Presentations
Dec. 4 th	4 Group Presentations
Dec. 8 th	Remaining Presentations and Final Wrap Up: Business Etiquette Class

*Note: While every attempt will be made to keep to the schedule listed, unforeseen circumstances may necessitate modifications throughout the semester.

Reminder: The final written capstone project report, must be given to the professor in hard and soft copy 7 days after presentation date; otherwise, an “F” is assigned. The slides are required in soft copy format only. The electronic copies are retained for at least 3 years. After final grades are posted you can arrange to pick up your report from the instructor. Please check the University’s important dates & deadlines (<http://www.carleton.ca/cuuc/university/academicyear.html>) for information on this term’s start & end dates, holidays and drop deadlines.

GROUP SELECTION AND CONFLICT

Students must organize themselves into a group of no more than **four people**. I do not select your partners but I may occasionally assign people to join groups that have less than four people. Since the groups are primarily formed on the basis of self-selection you are thus responsible for your choices. Minutes should be kept of all group meetings as they will be needed if the group decides to split up. In addition, they also form part of your participation grade. In week two and four which take place in the library room 481, you will be required to submit your meeting minutes to me by the end of the class for grades.

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. You may find the resources at http://sprott.carleton.ca/academic_programs/groupwork useful.

In the first class I require a list of your group members, your email addresses, your company choice(s) (If you have any at this point), and your first and second choice of a presentation dates. I will also ask for your phone number but providing it is optional. Why? I sometimes receive messages from students that require more extensive explanations and phone calls are thus more appropriate. Consult the course outline for presentation dates remembering that your final written report will be due exactly one week after your class presentation. A presentation schedule will be posted within one week of the first class.

As the first assignment is due two weeks after the first class, you must be vigilant about deadlines and communication. You must exchange emails and phone numbers with your group members in the first class as I cannot share contact information with you. If you fail to answer emails or phone calls from your group members you can be removed from the group and then be required to complete the project on your own with the same standards of grading that are applied to groups of four. The same holds true if you fail to carry your weight throughout the project. **Remember that work submitted for final editing should be properly referenced and edited by each student. No one should have to clean up someone else's work in terms of content and presentation of material. Failure to submit work according to the group's predetermined timetable is unfair and a theft of others' time as they must scramble to make up the deficit.** Each student should keep working papers and estimated time spent on his/her research and preparation on his/her contribution. Document meetings and track whether responsibilities are being met by each group member. I recommend that your group contract (at the end of this outline there is a sample academic integrity form and a group contract) specifies a reasonable time limit in which to respond to messages. In addition, set up sensible time lines for submitting individual portions of the work to the group editor that allows time to assemble the information into a coherent report. There is no excuse for late, sloppy work. Moreover, it is obvious to me when no one has proof read the entire report as typically there will be inconsistencies and even contradictions within the paper which greatly reduce the credibility of the paper.

It is recommended that your individual parts of the assignment be completed at least two to three days before the due date so that the person coordinating/editing the report has time to review and coordinate all the information. As these projects are long, it is unrealistic to expect that the person assigned in your group to put the assignment together in one or two days. It takes time to resolve issues like missing references (this issue should never occur!), incoherent passages while tidying up the grammar and formatting and ensuring proper transitions between different parts of the assignment. Please remember that it is essential that proper referencing be done; therefore, all work must be fully and properly referenced before submitting it to the team coordinator/editor. Remember that plagiarism will result in automatic failure. It is realistic to allow a minimum of three days for editing and final revisions. It is very important that students respect the deadlines set by the group. Also be very careful when printing graphs in black and white as it is nearly impossible to discern lines which are done in shades of grey on a graph. For the three assignments it is perfectly acceptable to colour the lines by hand (you can use highlighters or colour pencils or markers). The final assignment should be done in colour as this is more professional; moreover, if you plan to show this to future employers a professionally printed report is necessary.

NEW: At the beginning of each section within each assignment, the name of the student who mostly authored that section must be indicated as author e.g. Socio-Cultural Jane Doe

Each term, on average 1-2 groups experience conflict concerning the relative contribution of each student. Try to resolve it amongst yourselves. As a last resort, if the conflict cannot be resolved, you can provide documentation to me proving that another student has not been meeting his/her obligations and request that the group be broken into 2 groups: a group of 3 students and a 1 person group. Each group will share ownership of the assignments on which all their names appear. The group of 3 and the group of 1 will continue analysing the same firm. However, each will present separately and neither will witness the presentation of the other group. Once the third assignment is complete, no groups will be permitted to disband.

It is not a defence to the decision to argue “the other students do not like me”. Students are very self-interested. If your group colleagues do not “like” you, it is because you are not performing and are pulling down their grade. In other words, you are a value-destroyer – not a value-creator. You will not be evaluated by a lower standard in recognition of the increased work load due to the smaller group size. Do everything possible to ensure harmony and equitable sharing of the research and work. Otherwise, each of you will pay a price in increased work load and a probable lower final grade. It is also essential that you are prepared to start the project on the first day as the time lines are extremely condensed.

COMMUNICATION WITH INSTRUCTOR

Please use your MyCarleton (Connect) account to email the Instructor and **indicate what project you doing every time you email me**. It is a new University policy that the University may only contact you through your connect account. If you have not done so please activate your account immediately at: <http://apps.carleton.ca/ccs/acct/student/account.asp> and check it regularly please. Also include your phone number as it is often helpful to clear up problems quickly by phone. I provide a high level of support for this course but I may take up to 24 hours to respond to you on the weekdays and 48 hours on the weekend.

COMPANY/FIRM SELECTION POLICY

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 research necessary to determine if sufficient information is available. For example, each group must select a **publicly traded firm** (in any industry) with a **minimum of four years of consecutive financial statements**. Please verify that some of the major competitors also have a minimum of four years of financial statements so that appropriate comparisons can be made.

You are not permitted to analyze any firm on the ineligible list provided on cuLearn and your final selection must be approved by the instructor. In addition to the firms on the list(s), government owned corporations like CMHC, VIA and the Bank of Canada and all non-profits and NGOs are also unsuitable. You must select a for-profit publicly traded firm on a major stock exchange. As a key component of this project is to compare things like market capitalization over time; therefore, you must have trend data to complete the project.

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. Authorization by the professor is not a guarantee that there is sufficient information but rather that no other group has already selected that firm. It is the group's responsibility to ensure the adequacy of information available to complete the required exhaustive, comprehensive strategic analysis. Should it subsequently become apparent that there is insufficient information to adequately complete the assignments, it is the students' responsibility to change firms and obtain authorization of the new firm. The students may change the selection of the business firm at any time prior to the due date of the second assignment, but must receive the necessary approval. No extensions in assignment deadlines will be granted and the final report must fully analyze the last authorized firm.

To summarize Firm Selection:

- No two groups may select the same business firm in the same course section
 - firms analyzed in past 24 months in capstone course are not eligible, nor are any other firms indicated on the ineligible list posted to cuLearn
- Firm must be publicly listed (i.e. TSX, NYSE, NASDAQ) on the US or Canadian stock exchange for at least the last 4 years – the NASDAQ breaks out all listings into small cap, mid cap and large cap: <http://www.nasdaq.com/screening/companies-by-industry.aspx?exchange=NASDAQ> (see tabs on the left side where you can click on small cap or mid cap)
- It must be a single business firm - avoid corporations that operate in multiple businesses (e.g. diversified firms like GE, Bombardier are too complex)
- 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
- It must be only doing business in the USA and/or Canada but not in multiple countries (exporting excluded) Avoid firms doing business on multiple continents (e.g. McDonalds – too complex – operates in over 170 countries)
- Avoid very small firms (e.g. less than 500 employees, due to insufficient information)
- The firm selected must a SMALL or MID cap. firm – you may not select a large cap. firm
- A firm analyzed in previous courses by a student is eligible – provided that the student discloses this information to the professor in writing in the first assignment; you are however reminded it is a violation of academic plagiarism policy to submit substantially the same analysis for two courses.
- **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)
- It is the group's responsibility to ensure that there is sufficient information to complete all the assignments and the final report.

Additional Guidance on Citations/Bibliography:

You are being graded in part on the degree, depth and quality of your empirical research, demonstrated by citations to appropriate sources. A minimal number of citations points to inadequate research. Ensure that you cite every graph, table, report, quote, original idea or piece of information taken from somewhere else, to avoid plagiarism. For citations, **footnotes - not endnotes must be used** (see the footnote function under references in Word). Given the amount of empirical research required, there should be footnotes for almost every page. When in doubt, cite, paying particular attention to correctly identify phrases as quotations with precise references to their source. Any use of more than 5 consecutive words is a quotation and should be cited accordingly.

Footnotes:

Every source for citations, statistics, tables, etc. should be sequentially referenced to a footnote at the bottom of the page. Full information should be provided to allow a reader to know exactly where you obtained the data, remembering that direct quotations require a specific page number(s). When a subsequent citation is made to the exact same one that proceeds you may identify it as *ibid* (for more details see: http://www.chicagomanualofstyle.org.proxy.library.carleton.ca/16/ch13/ch13_sec064.html).

Bibliography:

It is important that you follow a recognized style to present a comprehensive bibliography that ensures an integrated **alphabetical** order and recognizes multiple citations to same year documents from a common source. Guidance provided by the Academy of Management in its Style Guide may be found at: http://journals.aomonline.org/ami/style_guide.pdf - see from page 4 for details (disregard the *in-text*, *in-parenthesis* identification, as the required use of footnotes replaces this format).

Be consistent when ordering your citation sources so that like items are grouped together. For example, Natural Resources Canada may also be referred to as NRC (both of which are acceptable), however in ordering citations from multiple NRC documents select one format and list consecutively by date (from oldest to most recent).

It is strongly recommended that you designate an editor for your Capstone report to ensure the coherence of your document, ensure that all required elements have been included (see assignment instructions and rubrics) and that all citations are accurate and correctly included in the bibliography. Remember that this can be a very onerous task if group members are sloppy with their work. Each group member should carefully proof read his or her work before submitting it to the editor and ensure that all references are cited. Also when dividing up the work, remember that editing is a very time consuming task and for the final report this could be more than two full days of work – adjust everyone’s workload accordingly.

Assignments, Verbal Presentation and Final Report

- Each assignment and the final report should incorporate and integrate the knowledge acquired in the core business courses taken prior to this course. That is why this course is called "capstone" and why the student completes the capstone course at the very end of the degree program.
- The assignments represent the major components of the final capstone project. Comments and suggestions will be provided on each assignment and through the use of rubrics. It is expected that those comments will be considered and incorporated into the final presentation and final report.
- Very detailed rubrics and instructions are available on cuLearn - please refer to them while working on your project and follow the order suggested in the assignment instructions. I suggest that each group member proof read the paper before submission for grading as poorly written papers will not be given an "A" grade regardless of content. Remember that I cannot mark a paper that I cannot understand. Poorly edited papers will be assigned a deduction of up to twenty percent of the paper’s grade value. Why? In business, how you present information matters – sloppy work affects credibility.
- **VERY IMPORTANT:** I require an **executive summary for each of the three assignments** of no more than two double spaced pages (or one single spaced page) placed before the TOC **from each group member**. These four (if you are a group of four) executive summaries will be helpful when composing the final group executive summary (one single spaced page) for the final submission of the capstone project. Spend time on them and ensure that they are well written, analytical and error free as the executive summary is the most important page in any paper. In the final paper (and third assignment) the executive summary must include your recommended strategy for the firm and remember that executive summaries are not “introductions”. Introductions explain the approach that will be used to write a paper including what the paper will address. In contrast, executive summaries provide a summary of what was found – in other words your key findings and conclusions drawn (in the case of your third assignment, this will also include your proposed strategy). In the executive summary for the third assignment, you must explain your proposed strategy including financial justifications for your plan (and a timeline). For example, you should include what your proposal(s) would cost and what you believe would be the benefits from that spending. If you wish, your paper can have an introduction to situate what follows but this is in addition to the executive summary (not in place of it); this should appear immediately after the TOC. Each assignment should include an academic integrity form signed and dated by all group members (see page 12 for sample please).
- Please note that page numbers suggested in the outline for the three separate reports are **approximate** and each assignment will be unique. I will not be counting the number of pages but I expect you to write very concisely and make sure that the paper does not contain unnecessary information or repetition (no filler or excess adjectives please). Remember that in business, BRIEF IS BEST! Also, avoid unnecessary words like "more and more" and colloquial language. Also, all reports must have page numbers and a TOC. The most common grammar error I find is confusing singular with plural. For instance, a firm is a single entity and therefore should not be referred to as plural.

Example: **Correct** As Tim Horton's is a coffee shop chain, it is very concerned with the price of coffee
Incorrect As Tim Horton's is a coffee shop chain, they are very concerned with the price of coffee

- After each verbal presentation, you will receive a one sheet written critique. These comments may be incorporated into the final written report due 7 days after the presentation along with computer files (Word, PDF and Powerpoint) uploaded into cuLearn. Each assignment, PowerPoint presentation and final report MUST include the students' first and last names, the name of the firm, and the course section number e.g. 4609A. Please do not include student numbers on any communication or work - these are highly confidential.

Assignment Format Requirements

All assignments must meet the following:

Font size: 12 pt minimum - Use Tahoma, Arial or Calibri (**please DO NOT use Times New Roman**)

Spacing: At least 1.5 line spacing for the text - I must have space to make comments

Margins: 1 inch all around

Pagination: Required

Printing: Only use single sided printing. You can print in black and white or colour for the three assignments. If you chose to print the three assignments in black and white then you must colour in the graphs manually so that they can be interpreted as it is virtually impossible to differentiate between shades of grey. The final paper must be bound and printed in colour. Print final paper as a PDF so that your spacing is properly maintained. This is particularly important if you have someone else print your document.

Cover Page: Include the name of the firm being analyzed, assignment number, and names of all group members (**do not** include student numbers)

Declaration of Academic Integrity: Example included below. Reminder that all group members must sign to obtain a grade on the assignment. It can be placed at the back of the assignment.

Executive summary: I require an executive summary from **each group member for each of the three** assignments of no more than two double spaced pages each placed before the TOC. For the final project a **one page single spaced group executive summary** is required. All of the summaries must be written in paragraph form.

Table of Contents (TOC): Required for each assignment and the final report. Include major captions and subheadings and of course page numbers. This follows the executive summary/summaries.

Quotations format: When more than 2 lines, single space and indent at both right and left margins, but do not insert quotation marks at beginning/end.

Bibliography: Complete details for all sources using Chicago style (good explanation on the library home page) or other recognized format, including specifics on web material and date accessed - **date accessed** must also be included in the footnotes for all web sources. Bibliography must be in alphabetic order.

Footnotes: References (same criteria as bibliography) must be included. Do **not** use endnotes or in text citations. The accuracy of all footnotes and references should also be verified. Cite **ALL** sources including

those from the World Wide Web (with date accessed). You should have many pages of references when your project is completed.

Text editing: Go beyond just *spell-check*, ensure correct grammar, syntax and sentence structure is appropriate for a business document (i.e. avoid colloquialisms, identify any acronyms the first time they are used in the text, integrate the members' writing styles to achieve coherence by a thorough editing). Papers that are poorly written are challenging to understand and will not receive an "A" grade regardless of the content. One of the most common complaints made by business people is that many university graduates write poorly. Remember that your credibility is reduced when you present an unprofessional report. In the business world, a poorly edited paper would likely not be taken seriously and may not even get a full reading. Please proof read carefully. If writing is not your strength, please take advantage of the resources offered through the university or enlist someone's help to edit your paper.

One person should be assigned the role of editor and that person should ensure that the sections completed by the individuals in the group, are integrated into a seamless web so that the entire report is consistent. Grammatical errors will be circled and it is up to the group to make changes before handing in the final paper.

This should be a professional looking paper (watch page breaks - **use print preview** - charts and tables should not be split between two pages). You may want to do your printing in PDF format to avoid any nasty surprises – especially consider this if you are having an outside party like Staples printing your document. There is also reasonable printing available from the print shop in the basement of Robertson Hall where they also do binding.

GRAMMAR, SYNTAX, STYLE

- Colloquialisms are generally acceptable in speech but not in a written report e.g. "company was burned", "executive was fired"
- Delete as many adverbs as possible e.g. "perfectly clear"
- Delete as many adjectives as possible e.g. terrible incomprehension, phenomenal advantages, blatant inequity, very dependent, drastically reduced
- Use the simple past tense e.g. "the firm has already been through" should read "the firm went through"
- Avoid lazy phrases and clichés e.g. "at this point in time", "it should be noted", "we wish to point out", "as you may know", "more and more"
- Only use last names - not first names - of CEOs
- Do not use the word "feel" - analysts think, believe, judge, determine, decide, ascertain, resolve, assume, infer, deduce, conclude, are of the opinion, but never "feel"

Printing: If you do not use colour (few do for the first three assignments), make sure that your charts and graphs are legible - use highlighters or markers when colour is needed. You will not receive credit for graphs that are unclear (i.e. indistinguishable lines)

Submissions: Assignments in printed form must be submitted at the beginning of the class when they are indicated as *due* on the course syllabus. For any assignment or final report that is late there is a one letter grade level penalty for each week late, prorated by the number of days, as explained in the course outline. Refer to course syllabus for final report presentation/submission requirements.

**BUSI4609: Declaration of Academic Integrity
Assignment _____**

DECLARATION OF ACADEMIC INTEGRITY: Must be included with each submission (all three assignments and the final complete project (do not bind it into the paper - just attach with a paperclip please). You can use the following sample of a similar one. All group members must sign to obtain a grade on the assignment. This can be attached to the back of the assignment.

The University Senate defines plagiarism in the regulations on instructional offenses as: “to use and pass off as one’s own idea or product work of another without expressly giving credit to another.”

I/we declare that the work submitted herewith is my/our work. All sources have been referenced in the footnotes and listed in the bibliography. This work has not been shared with anyone outside this group. This work is the intellectual property of each of the group members and will be returned to any one of the group members to be shared with the other group members, unless all members choose to designate only _____ to whom the work should be returned.

Student Name	Signature of Student (Everyone must sign to receive a grade)

Assignment submitted (date): _____

Instructional offence cases must be referred to the Associate Dean (Undergraduate Studies); individual solutions are not permitted.

GROUP CONTRACT FOR CAPSTONE PROJECT

Period Contract Covers: September 1, 2017 to December 16, 2017

Group Members Names and Contact Information

Student Name	Contact Information: Email and Phone Number	

Division of Labour (tasks, roles and responsibilities with expected completion dates):

Outline the specific duties of each team member (for example, you will need someone to assume the role of:

1. Group leader to direct the meetings (like a chairperson)
2. Secretary to keep meeting minutes
3. Editor to put together project components and ensure consistency and coherence
4. Printing – who will do this and how will printing costs be divided?
4. Project component tasks (consult the project instructions to ensure that all project components are addressed) with due dates for completion. Group member should agree to make equal contributions to group work and submit his/her work to the assigned person by the agreed upon due date – and make revisions as requested by the due date

Meetings

1. Meeting guidelines should address attendance requirements, frequency of meetings and the conditions under which an emergency meeting can be called
2. Group member should agree to carry out the expected preparation for meetings such as completing assigned tasks
3. Meeting and joint group work rules – sticking to the topic at hand by not conducting personal business during group meetings (phones off) and providing constructive feedback and suggestions, avoiding personal insults, contributing proactively to discussions

Commitment to use a variety of credible sources in accordance with the course guidelines, and use of proper formal academic style (i.e. proper footnoting and referencing), and to have no incidents of plagiarism

Address communication issues – communication frequency and type (email, phone and in person) including response times to email and phone calls and in person requests.

Process for solving disagreements and unmet expectations that might arise (include a method for peer feedback so that problems can be dealt with in a timely fashion)

Declaration: You might say “I have read the preceding group contract for the capstone project and I agree to the contractual items related to this project and I agree to be bound by its terms and conditions.

Student Name	Signature of Student (Everyone must sign to receive a grade)	Date

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).

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			

Grades Entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

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

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*). **Requests made within two weeks will be reviewed on a case-by-case basis.** After requesting accommodation from PMC, meet with me to ensure accommodation arrangements are made. Please consult the PMC website (www.carleton.ca/pmc) for the deadline to request accommodations for the formally-scheduled exam (*if applicable*).

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 and instructors can confirm accommodation eligibility of a religious event or practice by referring to the Equity Services website (<http://carleton.ca/equity/accommodation/religious-observances/>) for a list of holy days and Carleton's Academic Accommodation policies. If there are any questions on the part of the student or instructor, they can be directed to 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; a grade of Failure in 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: <http://carleton.ca/studentaffairs/academic-integrity>.

Sprott Student Services

The Sprott student services office, located in 710 Dunton Tower, offers academic advising, study skills advising, and overall academic success support. If you're having a difficult time with this course or others, or just need some guidance on how to successfully complete your Sprott degree, please drop in any weekday between 8:30am and 4:30pm. Our advisors are happy to discuss grades, course selection, tutoring, concentrations, and will ensure that you get connected with the resources you need to succeed! <http://sprott.carleton.ca/students/undergraduate/learning-support/>

Be in the know with what's happening at Sprott: Follow @SprottStudents and find us on Facebook SprottStudents Sprott.

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 hard 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, it would be easier to respond to your inquiries if you would send

all email from your Carleton account. If you do not have or have yet to activate this account, you may wish to do so by visiting <http://carleton.ca/ccs/students/>

Important Dates and Deadlines – Fall 2017

Graduate, Undergraduate and Special Students

September 1

Last day for receipt of applications from potential fall (November) graduates.

September 2-3

Residence move in weekend.

September 4

Statutory holiday. University closed.

September 5

Academic orientation (undergraduate and graduate).

Orientation for Teaching Assistants.

All students are expected to be on campus. Class and laboratory preparations, departmental introductions for students and other academic preparation activities will be held.

September 6

Fall term begins.

Fall and fall/winter classes begin.

September 15-17

Full and late summer deferred final examinations held.

September 19

Last day of registration for fall term and fall/winter courses.

Last day to change courses or sections (including auditing) for fall/winter and fall term courses.

Graduate students who have not electronically submitted their final thesis copy to the Faculty of Graduate and Postdoctoral Affairs will not be eligible to graduate in Fall 2017 and must register for the fall 2017 term.

September 30

Last day to withdraw from fall term and fall/winter courses with a full [fee adjustment](#) (financial withdrawal).

Withdrawals after this date will create no financial change to Fall term fees.

October 6

December examination schedule (fall term final and fall/winter mid-terms) available online.

October 9

Statutory holiday. University closed.

October 15

Last day for receipt of applications for admission to an undergraduate degree program for the winter term from applicants whose documents originate from outside Canada or the United States.

October 23-27

Fall break. Classes are suspended.

November 1

Application deadline to study at another institution on a [letter of permission](#) for the winter term.

November 10

Last day to request formal exam accommodations for December examinations to the Paul Menton Centre for Students with Disabilities. Late requests will be considered on case-by-case basis.

November 15

Last day for receipt of applications for admission to an undergraduate degree program for the winter term.

November 24

Last day for summative or final examinations in fall term courses before the official examination period (see [Examination Regulations](#) in the Academic Regulations of the University section of the Undergraduate Calendar).

November 25

Winter Payment Deadline. Click [here](#) for important payment information. [Late charges](#) may be applied to the student account any time after this date.

December 1

Last day for receipt of applications from potential winter (February) graduates.

Last day for graduate students to submit their supervisor-approved thesis in examinable form to the department.

December 8

Fall term ends – Monday classes will have a class on this day which means two classes are scheduled for the last week of classes.

Last day of fall-term classes.

Classes follow a Monday schedule.

Last day for academic withdrawal from fall term courses.

Last day for handing in term work and the last day that can be specified by a course instructor as a due date for term work for fall term courses.

Last day for receipt of applications for undergraduate degree program transfers for winter term.

Last day to pay any remaining [fall tuition fees](#) to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents.

December 9

No classes or examinations take place.

December 10 – 22

Final examinations in fall term courses and mid-term examinations in fall/winter courses may be held.

Examinations are normally held all seven days of the week.

December 22

All take home examinations are due.

December 25-January 1, 2018

University closed