



**Carleton University
Strategic Management
BUSI 4609 Section F – Winter 2018**

- Instructor:** Cheryl Volesky
Email: cheryl.volesky@carleton.ca
- Class Schedule:** Tuesday 8:35-11:25 (Section F) Southam 415
First Class will be in the Library Room 252 & others will also be in the Library – please refer to the class schedule
- Office Hours:** Available for consultation after class on either Tuesday or Thursday.
Additional hours provided according to need – high level of email and phone support –due to the quick pace, students tend to find this to be more helpful.
- 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 Bachelor of Commerce 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. To develop business writing skills including the writing of executive summaries.

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 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

Data produced by corporations that are “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. Information from data aggregators like IBIS WORLD and Marketline is helpful for getting ideas but you are expected to go to the actual sources of the information they collect and use these as your sources. Wikipedia is also not an acceptable source for data. Be aware that company produced information may not be neutral – be careful to ensure that your paper does not read like an advertisement for the firm under discussion.

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 that you will hand in with your first assignment. Each group must select an eligible (refer to ineligible list on cuLearn) **"for profit" publicly 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** as page 1 of the report (**placed before TOC**). 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**. You must also include an academic integrity form in each submission. Please Note: An executive summary is **not** an introduction describing 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: A copy of your slides 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 35%) must be submitted to the Instructor **7 days after the verbal presentation** in both hard copy (please print in colour) and a soft copy must be handed in on a memory stick (you must include a Word file and PDF file plus a copy of your PowerPoint slides). Please verify that the files are readable. 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). Be especially careful that you remove any overlap of information between assignment two and three. That means that the extra metrics required in assignment three will be included with the assignment two material and in that way the third section of the paper will only discuss strategy (current and proposed). Failure to submit all required components will result in failure of the course.
4. There is an attendance, participation and professional conduct grade of 5%:
Meeting minutes from classes in the Library: 1% in total
Four Days of Presentations: 1% each day (last four weeks of class)
Your attendance, participation and professional conduct 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 and failing to show up for sessions in the library. Attendance will be verified at any point during the class. You may forfeit your class participation marks if you are present for only part of the class. Attendance at other classes is also mandatory as this is where you will learn how to do the project and have an opportunity to ask questions.

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. **Automatic Failure:** Failure to write the final exam or return all examination materials to the instructor (signing out is required) or failure to submit the final report in hard copy and hand in a memory stick which has on it: your PowerPoint Slides and your report as both a Word File and PDF file will result in an automatic failure of the course (an “F” grade) and an FND grade (in case of missed Final exam or project).

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

| | |
|---|------|
| Three group assignments 3 @ 5% each | 15% |
| Verbal case presentation | 10% |
| Final Examination | 35% |
| Attendance (including meeting minutes), Participation and Professional Conduct..... | 5% |
| Final Written Case Report (include academic integrity form and a one-page exec. summary) .. | 35% |
| TOTAL | 100% |

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

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. However, there are instances where raw data is also relevant – for example, when determining market share and comparing size of market capitalization.

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 (including the order of the elements as it is logical).

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.**

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 Winter 2018 BUSI 4609 F Tuesday 8:35 CLASS SCHEDULE*

| | |
|---------------------------|---|
| Jan. 9 th | <p>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></p> <p>You will make up your own group so please pick carefully and draw up a group contract to be submitted with the first assignment please. Share contact information. 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</p> |
| Jan. 16 th | <p>Report to the library room 482 (Activity Learning Centre) with your laptops. Be prepared to work on your external analysis (it should be well underway) You must hand in your meeting minutes by the end of the class. Chapter 1 & 2: Strategic Management & the External Environment (PEST Analysis)</p> |
| Jan. 23 rd | <p>In Southam 415 Chapter 3 & 12: Internal Environment & Leadership Chapter 4: Business Level Strategy <u>ASSIGNMENT # 1 DUE</u> Plus please include academic integrity form and your signed group contract - see group contract suggestions/sample on pages 13 & 14 of this course outline.</p> |
| Jan. 30 th | <p>Report to the library room 482 (Activity Learning Centre) with your laptops and be prepared to continue to work on your internal analysis. You must hand in your meeting minutes by the end of the class. Chapter 5: Competitive Rivalry</p> |
| Feb. 6 th | <p>In Southam 415 Chapter 6: Corporate Level Strategy Chapter 7: Corporate Strategy - Mergers & Acquisitions Chapter 8: Corporate Strategy - International Strategies <u>ASSIGNMENT #2 DUE</u> (include academic integrity form)</p> |
| February 13 th | <p>In Library Room 482 – we may move to Southam 415 – I will notify class by email You must hand in your meeting minutes by the end of the class. Chapter 9: Cooperative Strategies Chapter 10: Corporate Governance</p> |
| Feb. 20 th | <p>BREAK WEEK – NO CLASS</p> |
| Feb. 27 th | <p><u>ASSIGNMENT # 3 DUE</u> (include academic integrity form) Finish any leftover course material & Exam Review</p> |
| March 6 th | <p>FINAL EXAM</p> |
| March 13 th | <p>4 Group Presentations</p> |
| March 20 th | <p>4 Group Presentations</p> |
| March 27 th | <p>4 Group Presentations</p> |
| April 3 rd | <p>Remaining Presentations and Final Wrap Up: Business Etiquette Class</p> |

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

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 week two, three and four which take place in the library, you will be required to submit your meeting minutes to me by the end of the class.

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 reduces 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. I will not write in the final report so that you can share it with others (but of course I mark it according to a detailed rubric).

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 as I have a minimum of 24 projects and it is challenging to keep track of who is doing what project.** It is 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 as I do use email to communicate with the class. Also include your phone number in your message 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. This is the most challenging part of the project (picking a firm to analyze). Be sure to pick a firm which has revenues.

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 (too challenging).
- 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 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. For the final paper I require an Executive Summary which is only one single spaced page. Ensure that it is well written, analytical and error free as the executive summary is the most important page in the paper is assigned more marks than any other page. 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 must 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) given to me on a memory stick. 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.**

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.

IMPORTANT TIP: Printing of the project can be expensive due to the length. For example, most final projects will cost around \$100 or more to print and bind (binding is not that expensive and can be done at many places). Therefore, you may find that it is cheaper to buy a colour printer and go in on it with your group as it may cost less than printing the paper and then you will have a printer at the end.

**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.

SUGGESTIONS FOR GROUP CONTRACT FOR CAPSTONE PROJECT

Period Contract Covers: January 9, 2018 to April 10, 2018

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 DEADLINES AND DATES:

January 8

Winter term classes begin.

January 12

OSAP deferral deadline. **Late payment charges and late registration charges** applied to the student account on or after this date for eligible OSAP students.

January 19

Last day for registration for winter term courses.

Last day to change courses or sections (including auditing) for winter 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 Winter 2018 and must register for the Winter 2018 term.

January 19-21, 26-28

Fall-term deferred examinations will be held.

January 31

Last day for a **fee adjustment** when withdrawing from Winter term courses or the Winter portion of two-term courses (financial withdrawal). Withdrawals after this date will create no financial change to Winter term fees and will result in a grade(s) of WDN appearing on your official transcript.

February 16

April examination schedule available online.

February 19

Statutory holiday, University closed.

February 19-23

Winter Break. Classes are suspended.

March 1

Last day for receipt of applications from potential spring (June) graduates.

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

March 9

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

Date TBA

Last day to pay any remaining balance on your Student Account to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents. An account balance may delay Summer 2018 course selection.

March 27

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

March 30

Statutory holiday, University closed.

April 7

Last day to pay any remaining balance on your Student Account to avoid a hold on access to marks through Carleton Central and the release of transcripts and other official documents.

April 11

Winter term ends.

Last day of fall/winter and winter-term classes.

Classes follow a Friday schedule

Last day for academic withdrawal from fall/winter and winter 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/winter and winter-term courses.

April 12-13

No classes or examinations take place.