



**Carleton University
Strategic Management
BUSI 4609 Section G – Winter 2021 Online**

- Instructor:** Cheryl Volesky
Email: cheryl.volesky@carleton.ca
- TA:** TBA
- Class Schedule:** Fridays 8:35 – 11:25 First class January 15th Last Class April 14th
First Class is compulsory – I will email you with instructions on how to link into this Zoom class. I encourage students to set up four person groups prior to the first class. If this is not possible, we can finalize groups in the first class. In this first class you will obtain the information you need to do the first assignment due in two weeks' time.
- Office Hours:** Available for consultation by prearranged appointment by ZOOM or Big Blue Button (through cuLearn). I also provide a high level of email and phone support. Due to the Covid-19 pandemic, no in-person meetings will be possible.
- Required Text:** Hitt, Ireland & Hoskisson, *Strategic Management Competitiveness & Globalization*, 13th Ed. 2020 Concepts & Cases, Cengage Learning, ISBN 13: 978-0-357-03383-8
- Required Technology:** A broadband internet connection – wired or wireless (3G or 4G/LTE)
Speakers and a microphone – built-in or USB plug-in or wireless Bluetooth
A webcam or HD webcam – built-in or USB plug-in
Group video using ZOOM requires:
720p HD video: 1.5Mbps/1.5Mbps (up/down)
Receiving 1080p HD video requires 2.5 Mbpa (up/down)
Sending 1080p HD video requires 3.0Mbpa (up/down)
- Modality:** Online: Approximately 19.5 hours (50%) asynchronous (prerecorded) and 19.5 hours (50%) synchronous (done in real time via ZOOM or Big Blue Button)
- Prerequisites:** Fourth year standing in all Bachelor of Commerce and successful completion of all 2000 and 3000 level courses in the major requirement. Note that Bachelor of Commerce students with a concentration in International Business require BUSI 4709 instead of 4609. 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.
Lecture equivalent to three hours a week.

COURSE DESCRIPTION

Strategic Management is the Sprott School of Business capstone course. Completed in the final (4th) year of study in the undergraduate program, this course focuses on strategy making in “for profit” business corporations. Students are 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 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 curriculum by application of acquired functional skills to corporate and business strategic analysis. Students are required to carry out very extensive empirical business research for this course using multiple government databases (e.g. Statistics Canada, US Census Bureau, Federal Reserve, Bank of Canada) as well as private databases (e.g. Bloomberg, Mergent, Factiva, and Business Source Premier). Students must select an approved, publicly-traded “for profit” business firm; research the firm, perform a rigorous strategic analysis and develop and present Corporate and Business strategies for the firm complete with a cost/benefit analysis.

Student Learning Outcomes:

1. Students will be able to apply key strategic concepts such as corporate strategy, business strategy, driving forces, key success factors, value chain analysis, economies of scope, core competencies and sustainable competitive advantage when analyzing a firm.
2. Students will be able to apply conceptual frameworks and models such as SWOT and Porter's Five Forces to analyze and evaluate practical business problems.
3. Students will be able to demonstrate applied business research skills through empirical business research.
4. Students will be able to articulate strategic perspectives that link the internal and external environment, the state of an industry and the capabilities and positioning of the firm.
5. Students will be able to integrate the functional knowledge acquired in previously taken business courses to evaluate each business function, as well as the interdependencies of business functions to firm performance.
6. Students will be able to assimilate and evaluate the cross-functional and interdependent nature of strategic business decisions by creating defensible corporate, business, and functional level strategies.
7. Students will be able to apply business writing skills by constructing a comprehensive professional report and PowerPoint slides.
8. Students will be able to demonstrate oral competency by presenting the key elements of their capstone projects in a formal presentation.
9. Students will be able to develop team skills by working and contributing to an interdependent, collaborative, and professional team environment.

Communication with Professor & Email Policy

I do not hold fixed office hours, though you will find me highly accessible. The preferred mode of initial contact on any matter is email. Please use only your MyCarleton (Connect) account to email the Instructor and indicate what course (BUSI 4609G) and project (in the subject line) you are doing every time you email me as I have other courses and it is challenging to keep track of who is doing which project. In keeping with Carleton University policy, your Carleton email address must be used for all enquiries. I do not read emails which come through any other accounts like Gmail accounts. I do not respond to student emails over the weekend. During the work week I will endeavor to answer your emails within 24 hours; you should not expect an immediate response. In addition, there may be occasions when I may not be available for longer periods and I will notify you in advance when those times will be. I will make myself available for in-person discussions online (e.g., ZOOM, Big Blue Button) or by phone (please include your phone number and suggest some suitable times). I do not answer email questions that have already been discussed and answered in class, previous emails and/or are the answers are posted in cuLearn. Please use the cuLearn Forum (discussion board) to ascertain whether your classmates can assist you and check cuLearn and class emails first for any answers to your questions before emailing me. Also please check your email daily as I sent out periodic class emails using cuLearn.

Zoom and Big Blue Button Classes/Meetings

Some classes will be held using the ZOOM platform and some will be prerecorded. If you do not already have a ZOOM account, you must create a free ZOOM account. This can be done by going to (<https://zoom.us/>) and using your Carleton email address (e.g., Firstname.Lastname@carleton.ca) – **DO NOT** use your gmail account. When ZOOM classes/meetings are scheduled, a class/group meeting link and passcode will be posted on cuLearn. At the appointed time (preferably a minute or two before) you can click on the Zoom meeting link and enter the meeting passcode and sign in using your Zoom account and password. I will then admit you to the class/meeting. To make things simple, you have the option to download a Zoom meeting app to your device (<https://zoom.us/download>) and this will give you near instant access.

Zoom classes may be recorded by the professor. The red light in “record” found on the Zoom toolbar will inform you that the class is being recorded. A recording may or may not be posted after the session in which the recording occurred. Any recordings are meant for the viewing purposes of only those students enrolled in the class and students are not authorized to make a copy of the recorded class; any sharing of any recorded is strictly prohibited. The instructor and the TAs may view the recordings for grading and any other academic and/or administrative reasons.

Meetings will typically take place in Big Blue Button found in cuLearn. This platform is very useful as it allows students to meet virtually to work on their case study. Only your group members and the instructor and the TA have access to your Big Blue Button group meeting place. If a session is to be recorded the person recording it must notify all participants of their intention to do so.

If a student has any concerns about privacy issues, this person must bring this issue to the attention of the instructor within the first week of classes so that reasonable accommodations may be made.

Course Material Sharing Policy

Students are not permitted to audio or video record any portion of the class lectures or presentations, nor are you permitted to make digital images of the lecture slides. If you feel that you require this form of accommodation, please contact the Paul Menton Centre to formally request accommodation.

Student or professor created materials which include all videos, lectures, presentations, notes, slides, case studies, assignments and exams remain the intellectual property of the author(s). They are intended for personal use only and may not be reproduced or redistributed without prior written consent of the author(s).

Course Requirements and Student Deliverables:

This is an extremely demanding course. You are required to complete very extensive applied empirical business research for this course. You must select a large “for profit” business firm to research and develop a strategic analysis in conjunction with no more than three other students (4 students per group maximum). It is best to select a diverse group of individuals to form a group as the project must cover all the functional areas of a business (having four marketing students makes it a challenge to do finance and vice versa). Assignments, presentations, or final reports that do not include substantial data and comparative metrics will receive lower grades – including failure. You must source all materials including charts and graphs in both the presentation and on the slides. You will be required to include and sign an academic integrity form with all submissions.

Student Deliverables Mark Break-down

Final course grades are weighted as follows:

Three group assignments @ 5% each	15%
Verbal group presentation (individual grade)	10%
Final group report – group grade	20%
Final group report – individual grade	20%
Final individual closed book examination	35%

TOTAL **100%**

NOTE:

Final Grade: Group component - 35%

Final Grade: Individual component - 65%

Final grades are subject to the Dean’s approval

Automatic failure: Failure to write the final exam, or failure to submit the final report and presentation slides, will result in an automatic failure of the course (an “F” grade). No requests for private deliverable substitutes are permitted.

Grade changes: Informal requests for grade increases are always denied. All student deliverables (i.e., exam, assignments, presentation slides and final report) are retained for one year. The student may file an appeal of the final grade pursuant to university regulations. I provide all documentation to the Appeal Committee.

Student Deliverables

To obtain a passing grade for the course, all students must complete the following deliverables:

1. Group Assignment 1: external environmental analysis
2. Group Assignment 2: internal value chain and competitive analysis
3. Group Assignment 3: corporate and business-functional strategies
4. Final Individual CLOSED BOOK Exam (in class)
5. Final Group Presentation BUT individual grade (delivered during Weeks 9-12)
6. Final Group Project Report (due exactly one week after date of group presentation)

Assignments: Each group will research, write, and submit three assignments each worth 5% of your overall course grade. **Each section must be labelled with the name of the person who authored it.** The three assignments collectively represent the first draft of your final research report. Each assignment must be uploaded to CuLearn. Detailed assignment requirements will be posted to cuLearn.

Poorly written and edited (including poorly formatted) papers may receive a deduction of up to twenty percent. Why? No one will take you seriously in business if you cannot convey your ideas properly. **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; this means that everyone in the group must proof read this. Please Note: An executive summary is **not** an introduction describing what the paper will discuss; rather, it is a summary of

the key findings in the report and I like to see metrics because they tell a story. Please refer to the document on cuLearn on writing executive summaries. Also, every paper must have a table of contents and page numbers. Your list of sources is placed before your appendices. You must also include an academic integrity form in each submission which attests that all materials used have been properly sourced (each student must take full responsibility for doing this – it is not someone else’s job to figure out where you found something – no editor should have to do this). Allow sufficient time for an editor to edit and format your paper – this is a **big job** as the report is to appear seamless and professional. I recommend that all work be completed three days ahead to allow for sufficient time for the editor to “perfect” the report. All reports must be submitted as a **Word document** into the assignment section on CuLearn so that I can track changes in the document. This will greatly help you when revising the document. Once graded, your paper and a rubric will be returned to you with feedback in cuLearn.

Presentation: The presentation represents the second draft of your strategic analysis of the firm. **Every slide must indicate the name of the student who authored that slide.** All charts and graphs must be sourced just below each one. Each group will make a thirty minute oral presentation 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). The question period after the presentation is **not** included in the time limit. Each group member must participate. There will be a 10% automatic deduction for overtime presentations. The group PowerPoint presentation **MUST** be uploaded to CuLearn 24 hours before the presentation. The slide deck must include your speaker notes (inserted into the notes pages attached to the PowerPoint slide and identified by who will present each part). The assigned grade will be based on the quality, effectiveness, and professionalism of the presentation.

Final report: The final report will consist of final, revised versions of the original three assignments and the presentation. This capstone report must be uploaded to CuLearn seven (7) days after the verbal presentation as both a Word file and a PDF. Please verify that the files are readable. You are not required to provide a printed copy. **All files must be labelled with your company name appearing first in the file name followed by the year** (for example: Tim Hortons 2017 – please do not add anything else to the file name). 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 {up to 20%} with lower grades. Fluff reduces credibility in the business world as people then suspect that you do not have enough valuable information to share. It also shows disrespect for the reader’s time. You must remove any overlap of information between assignments two and three. Recall that the only reason that the metrics from assignment 2 are repeated in assignment 3 is for ease of marking or to explain or defend a particular strategy. Failure to submit all required components will result in failure of the course. There is a group grade for the final report **AND** a separate individual grade for the final report. Each section and subsection (i.e. each PEST factor, each of the 5 forces, individual VC activities, 3 dimensions of corporate strategy, business strategy and each functional area etc.) must be labelled with the name of the person who authored it. It is essential that you include authors names in the headings of each section and subsection so that this will be included in the table of contents as well.

Final exam: A multiple choice examination will be given in class. The final exam will be based on key strategic concepts from the course. **Students may find the final exam very difficult if lectures are missed since the key strategic concepts are reviewed each week – which is the basis of the exam.** If the exam is missed due to illness or emergency, the student must apply with documentation to Registrar’s to write in the official Deferred Exam Period in the following term. No make up exams will be administered within the term.

APPLIED STRATEGY RESEARCH PROJECT

This course is very front loaded which means that you have to begin your research immediately. It is also an extremely demanding course. Students are required to complete an extensive applied empirical business research project for this course. Students will form groups of four (maximum), select a publicly traded company on the US or the Toronto stock exchange, research the company and its competitive environment, and develop a strategic analysis. The following overview serves as an introduction to the project and covers these topics:

- Library research services

- Group selection guidelines
- Company selection guidelines
- Feedback and communication with professor

Library Research Services

The Carleton University MacOdrum Library has prepared an intensive tutorial for the first week of 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. Students are strongly encouraged to review the BUSI 4609 course guide prior to this class, available at the Library website:

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

The volume of information available will easily overwhelm the uninitiated student. The library course guide and tutorial cover several of the databases available to support your research and will help you access those resources most likely to be useful to your research.

You are also expected to read recent business media articles from reputable international newspapers, 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.

You are strongly discouraged from using data from advocacy groups, unions, or business associations as they are not neutral but rather advocacy groups (lobbyists) trying to persuade the public and 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 Statista, IBIS World and Marketline is strongly discouraged as you are expected to go to the actual sources of the information they collect and use these as your sources e.g. Stats Canada. Wikipedia is also not an acceptable source for data.

Every section of your assignments, presentation and final report must include metrics and empirical comparative normalized data to support what you are arguing throughout (this includes the referencing of all charts and graphs by using footnotes).

Group Selection Guidelines:

The Sprott School of Business encourages group assignments in the school for several reasons. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Students will **self-organize** themselves into groups of no more than four people from the same section of the course. Please refer to cuLearn for the class list and reach out to your fellow students. If you do not know anyone in the class reach out through email by providing a brief overview of your skill set and major/minor and state that you are looking to join a group. Select group members who have similar goals in terms of achievement and construct a group contract that you must hand in with your first assignment (see suggestions on cuLearn). Please also consider putting together a heterogenous group. Like a firm, having all team members coming from the same functional discipline can create challenges when other areas of a business are not represented. Groups will be finalized up to and including the first class, so it is imperative that you organize your team prior to start of term. Each student should keep working records and estimated time spent on his/her research and contribution to the team project. Keep minutes of all group meetings.

Each term, some groups experience conflict concerning the relative contribution of each student. Try to resolve it amongst yourselves. You are about to enter the business or professional world where you are responsible for your own choices and decisions. In the past, when conflicts cannot be resolved, I have split the group into two groups – subsequent to written documentation of missed deadlines, lack of contribution etc. If there is one person who is not contributing to the group standards, that person may be asked to leave the

group and continue to work alone with no change in the expected deliverables which will be graded to the same standard as applied to all groups. If someone in your group is not measuring up to the group standards, please address this issue immediately. Once the third assignment has been submitted, no groups will be permitted to divide.

Company Selection Guidelines

It is the responsibility of the student group to select the business firm that will be the basis of the assignments and comprehensive strategic analysis. Consider selecting a firm in an industry that appeals to you as the knowledge you will gain through this process can be useful when applying for jobs in your chosen industry. It is the students' responsibility to undertake the preliminary research necessary to determine if sufficient information is available on the company. The selection of a business firm is an assurance – by the students to the professor – that there is sufficient information available to complete the assignments and strategic analysis.

Firm selection must be authorized by the instructor to ensure that two groups do not select the same business firm or an ineligible firm. The ineligible list is posted on cuLearn so please check it first. As many students are requesting firms at the same time, the list may not be a 100% accurate at any one time so you must verify your choices with the instructor. Authorization by the instructor is not a guarantee that there is sufficient information to complete the analysis. Having a **minimum of four years of full financial statements** is a requirement so that proper financial trend analysis can be done, and comparisons made between competitors. Also verify that some (at least two and preferably three or more) of the major competitors also meet the same requirements. Why? High availability of information makes the project easier to complete. Consequently, you are not only looking for a firm to study, but a firm in an industry with big enough firms that have been publicly traded for at least four years. Recall that under SWOT analysis that strengths and weaknesses are determined through cross-company comparisons. Should it subsequently become apparent that there is insufficient information to adequately complete the assignments, it is the students' responsibility to select a new firm and obtain authorization to make the change. The students may change the selection of the business firm at any time prior to the due date of the first assignment but must first receive the necessary approval.

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

Requirements and Suggestions for Firm Selection

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

Data Reliability

You will be required to use data that is reliable. It is mandatory that you review the annual reports and the audited financial statements for the firm you chose to study. You must also review the chosen firm's key competitors' reports as major cross-company comparisons are essential. You must use data produced by government departments and agencies such as Stats Canada or the US Census Bureau, or US Federal Reserve FRED or the US Department of Energy or Transport Canada. You will also use data produced by International Governmental Organizations (IGOs) such as the OECD, IMF, WTO, IEA, FAO, ICAO.

You will also use published reports by the international accounting and consulting firms e.g. Deloitte, McKinsey, BCG, Mercer, Gartner. You will also use the "quality business media" such as Wall Street Journal, Reuters, Bloomberg, Globe ROB, New York Times, Financial Times.

Data Normalization and Comparison

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

Assignment and Final Report Formatting Guide

All assignments must include:

- File format: Microsoft Word (.docx) is required
- Font: Please use 12pt Tahoma or Arial (**NO Times New Roman**). Do not use "fancy" embellished fonts
- Double spacing
- Margins: 1 inch all around
- Pagination: place page numbers in the upper right margin (header)
- TOC must include page numbers and the names of the contributors to each section – to do this put the contributors name in your heading and sub-headings please.

Each written assignment should include the following items:

- Cover Page: Include the name of the firm being analyzed, assignment number, and names of all group members.
- Declaration of Academic Integrity: Example included on cuLearn. 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: a one-page executive summary, written by the group and placed before the TOC. All the summaries must be written in paragraph form (i.e., no bulleted lists).
- Table of Contents (TOC): Required for each assignment and the final report. Include major captions and subheadings which should also include the name of the person who authored that section and of course, page numbers. This follows the executive summary.
- Bibliography: Complete details for all sources using Chicago style (review a good explanation on the library home page) 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. Note that Microsoft Word also has powerful features to make your source reference management substantially easier. Click on References in the Ribbon and then insert citation to do both the referencing and the bibliography. Do not attempt to do this manually.
- Footnotes Mandatory: 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 internet (with date accessed & URL). Given the amount of empirical research required, there should be footnotes on almost every page.

- 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
- Graphics: you are expected to insert all graphics (figures and tables of statistics) directly in the text and not in appendices (only normalized company and direct competitor income statements and balance sheets for last 4 years are to be placed in appendices). Provide source information for ALL graphics. Graphics should NOT be split over a page break. Please do a thorough formatting review before submitting to ensure that your embedded graphics appear as intended. Each graphic should be sourced underneath albeit in a shortened form with the full reference appearing in the footnote please.
- File size: when pasting in graphical image files, please take care to ensure to format the image to consume minimal disk space at the desired level of resolution.
- Some charts require modification because they contain some irrelevant material and/or they look unreadable or unprofessional. Be sure to create new charts using the data. You will produce a much more professional product if you have consistency between your charts.
- Quotations format: direct quotations may usually be cited inline using quotation marks. When citing a direct quotation of more than 2 lines, single-space and indent at both right and left margins, but do not use quotation marks.

Grammar and language suggestions:

- 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).
- Text editing: please do more than just run spell check – ensure correct grammar, syntax, and sentence structure is appropriate for a business document (i.e., avoid colloquialisms like more and more and drastic). Identify any acronyms the first time they are used in the text. Integrate the members' writing styles to achieve coherence by a thorough editing).
- Please proofread carefully. 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. I recommend allowing three days for this task as it can be onerous. 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. Be vigilant about proper referencing. 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.
- It is obvious to me when no one has proofread the entire report as typically there will be inconsistencies and even contradictions within the paper which greatly reduces the credibility of the paper and the grade of course.
- 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: As Tim Hortons is a coffee shop chain, it is very concerned with the price of coffee (**Correct** because Tim Hortons is a single entity). As Tim Hortons is a coffee shop chain, they are very concerned with the price of coffee (**Incorrect** because "it" is one firm).
- Colloquialisms are generally acceptable in speech but not in a written report, e.g., do not write "company was burned", "executive was fried"
- Do not use superfluous adverbs, e.g., "perfectly clear"
- Do not use superfluous adjectives, e.g., "terrible incomprehension", "phenomenal advantages", "blatant inequity", "very dependent", "drastically reduced"
- Use the simple past tense, e.g., write "the firm went through" instead of "the firm has already been 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 company executives
- 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"

COURSE CALENDAR

Class meets on Fridays (8:35am—11:25am) by Zoom or on Big Blue Button in smaller groups.

BUSI 4609 G Friday Class Schedule*

Week	Date	Content and Assignments
1	Jan .15	ATTENDANCE MANDATORY Library Session via Zoom – library business and statistics database tutorial. Do not miss this class as there are no make-up classes and student groups and presentation dates will be finalized Read: https://library.carleton.ca/research/course-guides/busi-4609 Review SWOT analysis on your own (online lecture slides posted on cuLearn) Finalize Project Groups and Presentation Dates Read: HIH Chapter 1 Introduction to Strategic Management Pre-recorded Lecture: Introduction to Strategic Management
2	Jan. 22	Read: HIH Chapter 2 External Environment Pre-recorded Lecture: External Environment (PEST Analysis) External Factor Evaluation Matrix (EFE) Explanation Meet each group to discuss EFE & Assignment 1 deliverables & progress – see shedule
3	Jan. 29	Read: HIH Chapter 3 Internal Environment Read: HIH Chapter 4 Business Level Strategy Pre-recorded Lecture: Internal Environment - Value Chain & Competitive Analysis Pre-recorded Lecture: Business Strategy DUE: ASSIGNMENT 1 Please include your signed group contract (see suggestions on cuLearn for drafting contract) and your academic integrity form
4	Feb. 5	Read: HIH Chapter 6 Corporate Level Strategy Read: HIH Chapter 7 Mergers & Acquisitions Pre-recorded Lecture: Corporate Level Strategy Pre-recorded Lecture: Mergers & Acquisitions Meet with each group to discuss IFE & Assignment 2 deliverables & progress
5	Feb. 12	Read: HIH Chapter 8 International Strategies Pre-recorded Lecture: International Strategies DUE: ASSIGNMENT 2 Please include your signed academic integrity form BBB Group Meetings upon request
	Feb. 19	WINTER BREAK
6	Feb. 26	Read: HIH Chapter 5 Competitive Rivalry Read: HIH Chapter 9 Cooperative Strategy Pre-recorded Lecture: Competitive Rivalry Pre-recorded Lecture: Cooperative Strategy Prerecorded Lecture: Corporate Governance Meet with each group to review assignment 3 deliverables & progress
7	Mar. 5	FINAL Exam (in class) DUE: ASSIGNMENT 3 Please include your signed academic integrity form
8	Mar. 12	Group presentations (slots 1-3)
9	Mar. 19	Group presentations (slots 4-6)
10	Mar. 26	Group presentations (slots 7-9)
11	April 9	Group presentations (slots 9-12)
12	April 14	Any remaining group presentations & course wrap-up

**Note: While every attempt will be made to keep to the schedule listed, unforeseen circumstances may necessitate modifications throughout the semester. Due to this very new online format and/or other unforeseen circumstances like documented illness or emergencies, some presentations may be scheduled outside of the regular class time. Additionally, the presentation schedule may become condensed and therefore completed earlier.

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

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

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

Requests for Academic Accommodation

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

Pregnancy obligation

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

Religious obligation

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

Academic Accommodations for Students with Disabilities

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

Survivors of Sexual Violence

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

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

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

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 on the submitted work and/or course; academic probation; a refusal of

permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, amongst others. Students are expected to

familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <https://carleton.ca/registrar/academic-integrity/>.

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 are 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/>

* Note that the office is physically closed. However, e-drop in is available between 8:30-4:30 until social distancing requirements are updated by the Province.

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, in order to respond to your inquiries, please send all email from your Carleton CMail account. If you do not have or have yet to activate this account, you may wish to do so by visiting <https://carleton.ca/its/get-started/new-students-2/>