BUSI 5106A
Business Case Analysis and Presentation
Fall 2016 (F1)

Instructor: Julie Caldwell, MBA
Office: 819 Dunton Tower
Telephone: 520-2600 x 6603
Email: julie.caldwell@carleton.ca

Practicum: Mondays -4:00pm to 5:30pm, Room 701 Dunton Tower
Seminar: Mondays -6:00pm to 9:00pm, Room 2104 Canal Building
Office Hours: By appointment, Monday to Friday 8am to 4pm

COURSE CALENDAR ENTRY FROM 2015/2016 GRADUATE CALENDAR:
Introduction to, and practical application of, the methods and tools of rigorous business case analysis and the design of strategic responses, including the preparation and delivery of presentations designed to convince decision makers of the validity of the analysis and strategic response.

LEARNING GOALS:
Using a variety of case studies and scenarios from real-world business environments, this course aims to provide students with the following skills:

- Critical analysis of information through use of case-based corporate scenarios.
- Development of logical, coherent, and well supported arguments.
- Refined presentation, written and verbal skills for use in the business environment.

In addition, this course is considered a prerequisite for MBA students that are interested in competing in academic case competitions at the MBA level through our prestigious Sprott Competes training program (http://sprottcompetes.ca).

COURSE PREREQUISITES:
Enrolment in the MBA program. The Sprott School of Business enforces all prerequisites.

REQUIRED READINGS:
Reading materials for this course will be in the form of case studies, which can be purchased individually through the BUSI5106 Coursepack at Harvard Business Publishing (hbsp.harvard.edu). There will be 5 cases in total during the course and they can be purchased for approximately $4.25 each. A complete list of cases for the course will be distributed to students the week of August 29th, if not sooner.
There is no required text book for this course although the following books would be an excellent supplement to the course material and are on loan from the Carleton Library, or can be purchased in hard copy or on-line format from various sellers:


**GRADING SCHEME**

1. Short Case Analyses (3 X 10% each) 30% individual
2. Personal DIP Video 10% individual
3. Practicum 15% individual
4. Class Participation and Peer Evaluation 20% individual / peer
5. Final Case Presentation and Memo 25% group / peer

**TOTAL** 100%

**COURSE STRUCTURE**

Week 1 will cover an introduction to the course, an overview of business case analysis and presentation skills. A short case will be assigned for the following class. This will happen in each of weeks 2, 3, and 4 and on week 5 students will be required to submit a personal DIP video. There will be an individual and a group component to each case assigned during these weeks.

**Short Case Analyses (30%) Individual**

Individually, it will be your responsibility to come prepared with a short case analysis which will be in the form of a written memo, approximately 1 page in length. A short case analysis template will be provided. This assignment is to be handed in BEFORE the class begins. There are three in total.

After the memo has been handed in, designated groups will be asked to make a business case presentation to the class based on the same case that the written memos were prepared for. The group is only responsible for preparing a presentation – there is NO written component as a group. Marks will be assigned for group presentations as part of the class participation and peer evaluation marks.

**Personal DIP Video (10%) Individual**

In week 5, instead of submitting a writing short case analysis, you will be required to submit a 5 minute DIP video recording. Details will be provided during the first class and you will have the first 4 weeks to work on this assignment. The final deliverable is an up to 5 minute personal video. Students will be required to have access to a video recorder, either through their phone or actual video recorder and will have to submit the video. If students do not have access to a video recorder, notify the instructor at the first class and arrangements will be made. The video will NOT be distributed or viewed by anyone other than the student and the instructor. This is an individual assignment.

**Practicum (15%) Group**
Groups that are designated to present each week will be required to attend the practicum in advance of that class to practice and hone their presentation and analyses skills. Groups will be given a maximum of 20 minutes during the practicum to do a run through of the presentation, seek feedback and ask questions of the Teaching Assistant to ensure that you are on the right track. Only the groups that are presenting that week are required to attend the practicum. Each group will only have to attend TWO practicums which will have marks assigned for participation. Participation marks will be recorded as follows:

2 practicums (15%) = 7.5% per week
- 2.0% for attendance
- 2.0% for presenting with group
- 3.5% for getting involved and sharing feedback, asking questions of other groups, sharing constructive feedback, completing practicum participation grid, etc.

Class Participation and Peer Evaluation (20%) Group / Individual
Each week, the class will actively discuss new concepts and cases and present analyses and recommendations. Participation marks will depend on several factors: overall attendance and class participation, role in group presentations and peer evaluations. Marks will be allocated as follows:

- 6.0% overall for attendance at each class (6 classes, 1% each week)
- 4.0% overall peer evaluation from group for role in group throughout course (completed at end of course)
- 5.0% overall class participation from week to week (includes being prepared for class, discussions, feedback during presentations, etc.)
- 5.0% overall for role in group presentations (2)

Students who do not attend class OR arrive late/leave early will not be awarded attendance participation marks for that week. Students who attend class but do not contribute in a positive manner to class discussions will also lose marks. Preparation and active participation in this hands-on and practice-focused course, is the expectation.

Final Case Presentation and Memo (25%) Group
The final class will be designated to final group presentations. One written memo for each group must be submitted before the presentations begin, along with a printed copy of the presentation being made. The memo will be no more than approximately 2 pages in length (no more than 800 words).

The group will then be required to make a 20 minute presentation on the assigned case, followed by 10 minutes of Q&A. Please note that the final class will take place on Monday, October 17th and will begin at 4pm and finish at 9pm. There will be a break. Further details will be provided. Marks will be allocated as follows:

- 12.0% for group presentation
- 8.0% for written memo
- 5.0% for peer evaluation of role in final group project

VIDEO RECORDING OF CLASS PRESENTATIONS
Please note that class presentations will be videotaped from week to week and made available.
available for team review and practice. Students not comfortable with this component should speak with the instructor during the first class. When possible, invited guests will attend classes for presentations and share feedback with teams.

**LATE ASSIGNMENTS POLICY**
Assignments must be handed in before the class begins. Late papers will not be accepted.

**FINAL EXAM**
There is NO final exam for this course however there will be a final group presentation, as well as a written short case analysis memo. More details will follow on this.

**COURSE COMMUNICATION**
Information on weekly assignments and other general information will be communicated during class on a regular basis. However all supporting documents, information, updates about the class and details regarding upcoming assignments will be posted to the course webpage through (https://carleton.ca/culearn/). It is your responsibility to visit cuLearn regularly to ensure you are keeping up with the course requirements.

**IMPORTANT ADDITIONAL INFORMATION**

*Drop Course Policy*
The deadline for academic withdrawal is the last day of classes (each term).

*Deferred Final Presentation*
Students unable to participate in the final group presentation (Oct. 17th) and/or participate in contributing to the final written group memo (due Oct. 17th) because of illness or other circumstances beyond their control must contact the instructor and the MBA office in writing. Alternate arrangements may be granted when the absence is supported by a medical certificate and or appropriate document/s to support the reason for the deferral.

*Course Sharing Websites*
Student or professor 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).

*Policy on Mobile Devices*
The use of mobile devices IS NOT PERMITTED in this class. It is disruptive to the instructor and class members. If you carry such a device to class, please make sure it is turned off. If an emergency situation requires you to keep it turned on, please discuss this with your instructor prior to class.

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**Group Work**
The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your instructor 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.

**Person with Disabilities**
Students with disabilities requiring academic accommodations in this course are encouraged to contact a co-ordinator at the Paul Menton Centre for Students with Disabilities to complete the necessary letters of accommodation. After registering with the PMC, make an appointment to meet and discuss your needs with me at least two weeks prior to the first in-class test or ITV midterm exam. This is necessary in order to ensure sufficient time to make the necessary arrangements. Please refer to [http://www.carleton.ca/pmc/](http://www.carleton.ca/pmc/) for all PMC information.

**Religious Observance**
Students requesting academic accommodation on the basis of religious observance 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 academic event. Accommodation is to be worked out directly and on an individual basis between the student and the instructor(s) involved. Instructors will make accommodations in a way that avoids academic disadvantage to the student.

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

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

**Academic Integrity**
Violations of academic integrity are a serious academic offence. Violations of academic integrity – presenting another’s ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student – weaken the quality of the degree and will not be tolerated. Penalties may include expulsion; suspension from all studies at Carleton; suspension from full-time studies; a refusal of permission to continue or to register in a specific degree program; academic probation; and a grade of Failure in the course, amongst others. Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: [http://carleton.ca/studentaffairs/academic-integrity/](http://carleton.ca/studentaffairs/academic-integrity/).

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**Important dates and deadlines**

BUSI 5106A  Fall 2016 F1
Sept. 5  University closed, Statutory holiday.
Sept. 6  F1 (six weeks) and F1&F2 (12 weeks) classes begin.
Sept. 30 Last day to withdraw from fall term courses with a full fee adjustment (financial withdrawal).
Oct. 10 University closed, Statutory holiday.
Oct. 14 F1 classes end. Deadline for academic withdrawal is the last day of classes (each term).
Oct. 17-21 F1 Exam and final project week. No regularly scheduled MBA classes with the exception of non-MBA courses, e.g. INAF/PADM/DATA classes.
Oct. 24-28 Fall break, no classes.
Oct. 31 F2 (six weeks) classes begin.
Oct. 31 Winter Payment Deadline. Visit the Fee Payment page for important payment information. Late charges may be applied to the student account any time after this date.
Nov. 25 F2 classes end. Deadline for academic withdrawal is the last day of classes (each term).
Dec. 9 F2 Exam and final project week. No regularly scheduled MBA classes with the exception of non-MBA courses, e.g. INAF/PADM/DATA classes.
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<thead>
<tr>
<th>Date</th>
<th>Topic</th>
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<tbody>
<tr>
<td>CLASS #1</td>
<td>Course Overview / Group Assignments / What is a case? / Case Study Process / Presentation Skills / DIP Video Assignment (due week 5) Deliverable: NONE</td>
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<tr>
<td>Mon. Sept. 12</td>
<td>Only groups 2, 4 and 6 are required to attend. Deliverable: Groups must be prepared with final draft of presentation for class and does a practice run through.</td>
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<tr>
<td>Mon. Sept. 12</td>
<td>Case analysis – Defining the problem; Identifying the issues; Analyzing the issues – exhaustive analysis. Deliverable: Group Presentations by groups 2, 4 and 6 / Independent Written Short Case Analysis Memo</td>
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<tr>
<td>Mon. Sept. 12</td>
<td>Case analysis – Analyzing the issues; Identifying alternatives. Deliverable: Presentations by groups 1, 3 and 5 / Independent Written Short Case Analysis Memo</td>
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<tr>
<td>Mon. Sept. 12</td>
<td>Case analysis – Making recommendations; Action plans. Deliverable: Presentations by groups 2, 4 and 6 / Independent Written Short Case Analysis Memo</td>
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<tr>
<td>Mon. Oct. 3</td>
<td>All groups have the OPTION to attend a final presentation run through and receive feedback. This is not required and marks are NOT assigned for attendance at this session. Deliverable: Groups must be prepared with final draft of presentation for class and does a practice run through.</td>
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<tr>
<td>Mon. Oct. 17</td>
<td>Deliverable: Final group presentations and group memo</td>
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**BASIC NORMS FOR THIS CLASS:**

**A CALL TO ACTION FOR LEARNING AND SUCCESS THROUGH COMMITMENT**

You are investing a lot of time, energy, and money in your education. Your chances of earning a potential return on your investment in each course end when each course does. Learning and success in your education requires your active commitment to it. You will be successful in this course if during class and homework times you are prepared to learn, engage in, and commit to the learning process. I am prepared to do everything I can to help you.

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<tr>
<th>My Commitment</th>
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<tr>
<td>Prepare a learning environment for each class.</td>
<td>Come to all classes ready to learn and participate.</td>
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<td>Start and finish on time, provide a break</td>
<td>Attend all classes, attend each class in full. Missing classes and/or arriving late or leaving early, except for emergencies and with notification, is rude to the class and disruptive of the learning environment.</td>
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<tr>
<td>Cell phone/PDA switched off throughout class.</td>
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<td>Solicit and encourage participation.</td>
<td>Participate constructively, presenting own ideas and critiquing those of others.</td>
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<td>Present opportunities to learn new ideas.</td>
<td>Strive to learn, seek clarification, and ask questions.</td>
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<td>Provide opportunities to apply new learning.</td>
<td>Think about how to apply new learning to examples given and share with class.</td>
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<td>Provide assistance and opportunities to consult during class breaks, during office hours, by email, and at other times as required subject to availability.</td>
<td>Seek assistance as issues arise. Do not expect 24 hour e-mail feedback, and consider your colleagues – the instructor deals with many students.</td>
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<tr>
<td>Provide detailed instructions on assignments. Follow instructions. Hand assignments in on time, learn from feedback.</td>
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<tr>
<td>Treat all course participants as responsible professionals, and act with civility and professionalism at all times.</td>
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*Original prepared by Dr. L.A. Heslop; adjusted by Dr. N. Papadopoulos*