IS Management and Strategy
BUSI4400A
Fall 2024

Instructor: Ajit Thomas, Ph.D.

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Office:	TBD
Phone:	613-407-6520 (cell)
Office Hours:	By appointment or email (location TBD)
Modality:	In person
Class Term:	Sept 4 - Dec 6 (Tuesday, 18:05 P.M - 20:55 P.M)
TA:	N/A

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Prerequisites

Fourth year standing, BUSI 1401 or BUSI 2400, and BUSI 3103 or BUSI 3602 (with a grade of C- or higher in each)
The School of Business enforces all prerequisites.

Course Description

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

Introduction

Investments in digital information technology (DIT) and DIT-based systems and processes are critical for business organizations operating in an increasingly digitalized world. Business firms and other organizations no longer have the option of not making such investments. Opting not to make DIT investments or making the wrong type of investments can have catastrophic effects for organizations and may leave firms vulnerable to adverse outcomes. For many firms, investments in DIT systems and related processes have been tremendously beneficial. For many other firms, the benefits from their substantial spending on DIT have been marginal. Why is it that some firms are better at

leveraging their investments in DIT systems than others? Popularly termed the 'IT productivity paradox' these asymmetrical outcomes of DIT investments have been of tremendous interest to both researchers and practitioners for many years.

While some have argued that DIT is a commodity with little strategic value (fueled by the rise of phenomena such as cloud computing, BYOD, among other recent trends), others assert that strategic value does not come from simply possessing the DIT assets. They contend that firms derive value from their DIT investments by developing superior capabilities to orchestrate the DIT investment and deployment processes, as well as the capabilities to presciently and effectively govern and apply the technological and human assets to achieve the strategic and operational objectives of the business. The core focus of any DIT investment is the value to be created and delivered that the customer is willing to pay for or fund. We subscribe to that view in this course.

Learning Outcomes

On completion of this course students are expected to have developed a deeper understanding of:

- the key strategic issues facing managers seeking to deploy and exploit enterprise digital information technology and systems.
- issues behind the 'IT productivity paradox' and what often is viewed as asymmetrical outcomes of DIT investments.
- the impact of the external environmental context on the strategic use of DIT in organizations
- the role of DIT systems as enablers of organizational transformation.
- the importance of managerial IT competence in orchestrating the design, implementation, and exploitation of DIT systems.
- the key DIT resources that must be sourced, assembled, and deployed to derive performance benefits.
- the actions that managers should take to build organizational digital information systems capability and ensure value is delivered for the investments made.
- the critical role of effective business leadership (both technology and non-technology) in articulating and governing the delivery of benefits from DIT investments.
- how strategic decisions are made in relation to delivering value from DIT investments and the consequences of such decisions on individual and organizational performance.

Course Material and Additional Reading

There is a textbook and a casebook for this course. Both can be obtained online in either e-book or paper format. There is a copy of both on reserve through the Carleton McOdrum Library as well.

Textbook: Grant, G. and Collins, R. (2016) The Value Imperative: Harvesting Value from your IT Initiatives, New York, Palgrave MacMillan. (ISBN: 978-1-137-59039-8

Case book: Robert D. Austin, Richard L. Nolan, Shannon O'Donnell (2016), The Adventures of An IT Leader, Boston, MA: Harvard Business Press. (ISBN: 978-1-633-69167-4).

Additional Readings will be drawn from a variety of sources. These are listed in the course schedule.

Supplementary Reading:

Students may read the following books for additional information.
- Pearlson, K. E. and Saunders, C. S. and Galletta (2019) Managing and Using Information Systems: A Strategic Approach – 7th Edition, Hoboken, NJ, John Wiley and Sons.

- James D. McKeen and Heather Smith (2009) IT Strategy in Action Publisher: Prentice Hall ISBN-10: 0136036317 ISBN-13: 9780136036319

- Broadbent, M. and Kitzis, E. S. (2005) The New CIO Leader: Setting the Agenda and Delivering Results, Boston: HBS Press (available at leading bookstores)

Online resources:
- Brightspace Learning Management - https://brightspace.carleton.ca/d2l/home
- BigBlueButton – (embedded in Brightspace for Office hours)
- Zoom – www.zoom.us for online synchronous class delivery
- Gartner https://www.gartner.com/home/feed (must use Carleton VPN and access through the Carleton Library databases). Gartner is a global research and consulting company that provides insights on digital IT management and technology issues.

Magazines:
- CIO, CIO Insight, Datamation, Baseline, Wired, Fortune, Information Week, Business Week, Forbes, etc.
- IT Service Management Forum International (ISTMFi) http://www.itsmfi.org/
- ITSMF Canada http://www.itsmf.ca/, ISACA https://www.isaca.org/pages/default.aspx , The Open Group www.theopengroup.org

Course Procedures and Grading

The course will primarily be based around cases and readings from the casebook and textbook as well as other sources that illustrate key issues in information systems management. Students must actively participate in the discussions and all associated class activities to get the best out of the course. The final course grade will be derived as follows:

Individual Discussion Contribution	**20 %**
Group Case Analysis and Presentation	**15 %**
Team Case Research Project	**15 %**
Final Exam	**40 %**
Class Participation	**10 %**
TOTAL	**100 %**

Individual Responses to Discussion Questions (weekly)

Each week a series of discussion points or questions will be posted in the online forum in Brightspace). The discussion questions will be drawn from the assigned chapter(s) in the Grant textbook. Each student is expected to individually respond to all the questions, using the online forum and engage in an interactive discussion with their classmates. Each student must make **at least five (5) substantive written contributions** (of at least **500** words each) to the discussion. The contributions must be made **over 5 different weeks** throughout the semester. The objective is to have students give due consideration to the issues emanating from the IVK case and help them prepare for the synchronous class discussion. Well thought out and written responses are expected. There will be **no make-up** contributions for those missed. Late submission of individual assignments will not be accepted after discussion on the topic has taken place in class. Only one submission per person will be marked each week.

Group Analysis of the IVK Corporation Case

In the first class, students shall form themselves into 6 project teams of approximately 4 members per team. The teams shall be denoted as A, B, C, D, E, F. Each team will present 3 chapters from the case book over the term.

As part of the learning experience in this course we will follow the exploits of Jim Barton, the new CIO at IVK Corporation, as he struggles to understand his new role as CIO and manage the challenges that the corporation faces in delivering value from IT investments. Each week, students, working in groups, will present an analysis of the relevant issues being faced by Jim and his team as described in the chapters assigned for that week from the book *Adventures of an IT Leader*.

The presenting group must synthesize the chapter(s) assigned, identifying, and discussing the main issues raised, and the **core problem(s)** to be addressed. The issues and problems should then be thoroughly **analyzed** (not just described again). The analysis should employ **theoretical ideas/models/frameworks** presented in class or relevant readings (those assigned, and others deemed relevant by the group). Alternative courses of action, recommendations, and implementation suggestions should be presented as appropriate. The presenting team will submit the **case presentation slides and a 2-page executive summary of the case** prior to the start of class on the day of presentation. The executive summary should identify the core issues raised by the case, the central problem to be resolved, the options available for resolving the issues and the option chosen. See the following resources on how to analyze a case and write-up a case http://college.cengage.com/business/resources/casestudies/students/overview.htm https://www.thoughtco.com/how-to-write-a-case-study-analysis-466329). In doing the presentation the team is expected to use a variety of strategies that will encourage class participation and active engagement (example: debates, dramatization, polling, videos, etc.). Credit will be given for creativity in presenting the case. Presentations can be developed as a video or presented live online during

class time. Questions and discussion will be live. Each group will have 20 minutes for the case presentation and 10 minutes for questions and feedback.

Team Case Research Project

The teams will conduct a case study of an information system in an **organization of their choice** using primary (interviews with key stakeholders) and published (online and/or print) sources. The case study should focus on the organization's experience with digital IT and can relate to issues such as strategic planning, IT governance, Investment priority setting, project management, IT service management, change management, sourcing IT services, post implementation performance review, training, among others.

Each team will prepare a write-up of the case consisting of no more 5000 words. Teams will then make a presentation of their case studies to the entire class at a time to be assigned. The case studies should be analytical and go beyond a mere description of the situation in the organizations. They should emphasize the strategic issues being tackled and include recommendations on how key challenges or opportunities might be addressed.

Project deliverables:

Deliverables for the team project include the following: a project proposal, project report, project presentation, and a **peer evaluation**.

> a. The proposal should provide a brief background (1 page) on the selected organization and the issues that might be addressed. It should contain the following: a title for the project, background and rationale, possible sources of information and resources that may be needed, and a project schedule. I will review each project proposal. The proposals must be submitted by the third-class meeting.

> b. The project report should be constructed as a business report. It should have a title page, an executive summary page, a table of contents and figures, the report itself, and appropriate appendices and illustrations. It should not be more that 5000 words in length, excluding appendices and illustrations.

> c. Each team will give an in-class online presentation of its project lasting no more than 15 minutes. This will consist of 12 minutes for the actual presentation and 3 minutes for questions. The limited presentation time makes it imperative for the group to organize what is to be presented. Visual aids should be used to enliven the presentations. However, these must be well designed and clear. All team members should take part in the presentation. The presentation can be in the form of a **video** or **live**. Questions will be live.

> d. Each student will be required to take part in two peer evaluation exercises. One of the project team presentations and one of his or her peers' involvement and performance in the project team. The evaluation of the presentation should be submitted at the end of the class

session in which the presentation was given. The evaluation of team member involvement and performance in the project preparation should be submitted separately to the teacher in the designated space on Brightspace. This evaluation should be done individually and not as a team. If the evaluation is not submitted, up to 5% of the project grade will be deducted for that individual.

e. The project submitted should be original work. A group that submits a project that is not original work will get a final class grade of Zero (0) and be subject to university policy regarding instructional offenses.

Class Participation:

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

Summary of Deliverables

The following schedule may be changed at the discretion of the instructor.

#	Deliverable	Submit To	Due Date	% of Grade
1	Project Proposal	Professor	3rd week of class	-
5	Individual responses to online discussion questions.	Professor	At the start of class on assigned date.	20
1	IVK Case Presentation	Professor	At the start of class on assigned date.	15
1	Team Case Research Project	Professor	Nov 22, 2023	15
1	Project Group Peer Evaluation	Professor	Nov 29, 2023	-
1	Own group peer evaluation	Professor	Nov 29, 2023	-
1	Final Exam	Professor	TBD	40

Assignment Submission
All written assignments including the group project should be submitted to the Professor by **8:00 a.m. (EDT/EST) via Brightspace,** on the day they are due. The assignments should be submitted in **.docx format. No printed document is required. However, you should retain a hard copy of your submitted work.** All documents should have the student's name, number, email address and course section.

It is the student's responsibility to ensure that all assignments are received in an accessible format on or before the due date. Assignments are due at the time indicated. **Late assignments will normally not be accepted.**

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Tentative Class Schedule

Dates	Topic Grant, G. and Collins, R. (2016) The Value Imperative: Harvesting Value from IT Initiatives, New York, Palgrave MacMillan	Cases/ Assignments Chapters in the Austin, Nolan and O'Donnell book	Additional Reading	Practitioner's Perspective
Sept 10	**Introduction and Class Organization Business and IT challenges for today's organizations** Chapter 1: Business and IT Challenges in Today's Organization		*Articles:* Kappelman, Leon; Maurer, Chris; McLean, Ephraim R.; Kim, Kevin; Johnson, Vess L.; Snyder, Mark; and Torres, Russell (2021) "The 2021 SIM IT Issues and Trends Study," MIS Quarterly Executive: Vol. 20 : Iss. 1 , Article 8. Available on Brightspace.	2021 CIO Agenda: Global Perspectives on Winning in the Turns https://www.gartner.com/document /3981533?ref=solrAll&refval=259466 155 (must access through the Carleton Library online databases). Digital Business Ambition:Transform or Optimize? https://www.gartner.com/document /3995632?ref=solrAll&refval=277677 662 (must access through the Carleton Library online databases).
Sept 17	**IT Leadership** Chapter 12: The Role of Leadership <mark>Individual Discussion Assignment #1</mark>	Chapter -1: The new CIO (<mark>Team A</mark>) Chapter -2: CIO challenges (<mark>Team B</mark>) Chapter-3: CIO leadership (<mark>Team C</mark>)	How to succeed as a CIO when you come from a non-IT background https://www.gartner.com/document/code/428684?ref=authbody&refval=	The skill traits of a next-generation CIO CIO.com Heller, M. (2019) Why the CIO Reporting structure matters, CIO.com Elberfeld, J (2019) Transforming your leadership approach in a digital transformation https://www.forbes.com/sites/forbestechcouncil/2019/07/15/transforming-your-leadership-approach-in-a-digital-transformation/amp/

			(must access through the Carleton Library online databases).	
Sept 24	**The cost of IT investments** Chapter 2: The Value Cycle Individual Discussion Assignment #2	Chapter-4: the cost of IT (Team D) **Group project proposal due**		Nicolas Carr's discusses his ideas on "IT doesn't matter" http://www.youtube.com/watch?v=PO2dCaaSDk8&feature=related Wilczek, M. (2019) Headache for the CIO: Shadow IT is soaring as LoBs seek greater autonomy, CIO.com
Oct 1	**The value of IT investments** Chapter 3: The Engineering Model of Business-IT Alignment Chapter 4: The Agricultural Model Individual Discussion Assignment #3 *** (answer min of 2 questions from each chapter)	Chapter-5: the value of IT (Team E)		Finding the Strategy Gaps Avoiding Alignment Traps http://resultsbrief.bain.com/videos/0711/index.htm
Oct 8	**Delivering Value from IT investments** Chapter 5: The Value Realization Cycle **Setting IT investment priorities** Chapter 8: IT Investment Portfolio	Chapter-6: Project Management (Team F) Chapter-7: The Runaway Project (Team A)	The Agile Admin "What is DevOPs https://theagileadmin.com/what-is-devops/	Son, Bryant (2019) A beginner's guide to building DevOps pipelines with open source tools https://opensource.com/article/19/4/devops-pipeline Cooper, R. The Stage-Gate Idea-to-Launch process http://www.stage-gate.net/downloads/working_papers/wp_30.pdf

	Individual Discussion Assignment #4 (answer min of 2 questions from each chapter)	Chapter-8: IT Priorities (Team B)		IT Portfolio Management http://cisr.mit.edu/research/research-overview/classic-topics/it-portfolio-management/
Oct 15	**Governing IT services.** Chapter 6: Governing IT services Individual Discussion Assignment #5	Chapter-9: IT and the board of directors (Team C)		An Executive View of IT Governance Why IT Governance should fall to the board
Oct 21-25 Study Break – no classes				
Oct 29	**Managing Service Operations and Business Continuity** Individual Discussion Assignment #6	Chapter-10: Crisis (Team D) Chapter-11: Damage (Team E) Chapter-12: Communication (Team F)		An Introductory Overview of ITIL Version 3 Verizon Suffers Cloud Data Leak Lindros, K. and Tittel, E. (2017) How to create an effective business continuity plan, CIO.com July 18.
Nov 5	**Building and managing the digital platform** Chapter 7: Enterprise Architecture Individual Discussion Assignment #7	Chapter-13: Emerging technology (Team A) Chapter-16: Standardization (Team B) Chapter-17: Innovation (Team C)		IT Priorities in the Downturn http://www.computerweekly.com/news/2240117393/IT-Priorities-Feature Emerging Technologies – Jack Shaw http://www.youtube.com/watch?v=9iQbt0uNwz0&feature=related CIOs discus cloud computing http://www.youtube.com/watch?v=C9WYyO2FKrU Nicolas Carr on cloud computing http://www.youtube.com/watch?v=7ymafpmWBA8&feature=related
Nov 12	**Sourcing IT Services and Talent**	Chapter-14: Vendor partnering (Team D)		Kaplan, J. (2017) How SaaS industry is becoming a victim of its own success, Datamation, July 10

	Chapter 9: Sourcing IT services ==Individual Discussion Assignment #8==	Chapter-15: Managing talent (==Team E==)		Greengard, S. (2019) 15 Top Manaaged Services Providers, *Datamation* https://www.datamation.com/cloud-computing/top-managed-services-providers.html Deliotte: Mind the talent gap http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/Consulting/ca_consulting_MindtheGap.pdf
Nov 19	**Managing IT Service Performance and Risk** Chapter 10: Measuring IT value delivery Chapter 11: Return on Investment (ROI) ==Individual Discussion Assignment #9== ==(answer min of 2 questions from each chapter)==	Chapter-18: Managing risk (==Team F==)		Olavsrud, T. (2017) 9 biggest information security threats through 2019, CIO.com March 28. Rechtman, Y. (2019) Shifting the risk of cybercrime, CPA Journal, July accessed at https://www.cpajournal.com/2017/06/19/shifting-risk-cybercrime/ Franklin, C. (2019) Equifax to pay up to $700M for data breach damages accessed https://www.darkreading.com/attacks-breaches/equifax-to-pay-up-to-$700m-for-data-breach-damages/d/d-id/1335315 Dellinger, A. J. (2019) Capital One hit with class-action lawsuit following massive data breach, access July 31, 2019 at https://www.forbes.com/sites/ajdellinger/2019/07/30/capit
Nov 26	**Harvesting Value from IT Investments** Chapter 13: It is not about technology: It is about value	Chapter-19: Looking forward		
Dec 3	**Project Presentations** **All Projects Documents Due Today**			
TBA	**Final examinations**			

* Case assignments may be adjusted depending on class registration

Contribution to Learning Goals of the Program (BCom, BIB)

Program Learning Goal	Competencies Not Covered	Competencies Introduced (only)	Competencies Taught But Not Assessed	Competencies Taught and Assessed
BC1 Knowledge *Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.*				X
BC2 Collaboration *Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.*				X
BC3 Critical Thinking *Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases and assumptions, and draw conclusions based on analysis and evaluation.*				X
BC4 Communication *Graduates will be effective and persuasive in their communications.*				X
BI5 Global Awareness (BIB ONLY) *Graduates will be globally-minded.*		X		

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/

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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 is 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.

Process: If an alleged violation occurs, all relevant documentation will be forwarded to the Dean. If the allegation proves true, the 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. **For a first offence, at a minimum, the penalty assigned will normally be a zero on the submitted work and at least a minimum full grade reduction of the final course grade.**

For a second offence, at a minimum, the penalty assigned will normally lead to a suspension from studies.

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 Undergraduate Student Services Office offers program advising and overall student success support. Our team is available to discuss your academic goals and your program progression plans. We can also work with you to develop strategies for success, including study skills for Business. If you experience any difficulty this term or if you would like to access support, please contact our team at bcom@sprott.carleton.ca or at bib@sprott.carleton.ca.

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/**