



**BUSI 5106A**  
**Business Case Analysis and Presentation**  
**Fall 2015 (F1)**

**Instructor:** Dr. Robin Ritchie  
**Telephone:** 613-520-2600 ext. 2420  
**Office:** 928 DT  
**Office Hours:** Wednesday 10:00 – 11:30 a.m. or by appointment  
**Class:** Wednesday 11:35 a.m. – 2:25 p.m. (Dunton Tower 701)  
**Practicum:** Tuesday 10:05 – 11:25 a.m. (Dunton Tower 701)  
**E-mail:** [robin.ritchie@carleton.ca](mailto:robin.ritchie@carleton.ca)

**COURSE DESCRIPTION**

*“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.”*

This course will use case studies to introduce you to the tools of business analysis and methods for developing appropriate strategic responses. You will also gain experience in the preparation and delivery of presentations to persuade decision makers of the validity of your reasoning and recommendations.

**LEARNING GOALS**

This course will provide you with the following skills:

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

BUSI 5106 is also a prerequisite for any student interested in competing in academic case competitions at the MBA level through the Sprott Competes training program (see [sprottcompetes.ca](http://sprottcompetes.ca) for details).

**COURSE PREREQUISITE**

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

## REQUIRED READINGS

Various case studies, as described in the session schedule. All cases used in the course can be purchased individually at [iveycases.com](http://iveycases.com) at a cost of \$3.40 each, plus HST. There is no required textbook in this course.

## OPTIONAL READING

The following provide a useful supplement to the course material, and are available on loan from the Carleton library, or for purchase from online booksellers:

- Elliot, William (2007). *The Case Study Handbook: How to Read, Discuss, and Write Persuasively About Cases*. Cambridge, MA: Harvard Business School Press.
- Mauffette-Leenders, Louise A., James A. Erskine, and Michiel R. Leenders (2007). *Learning with Cases* (4<sup>th</sup> ed.). London, ON: Richard Ivey School of Business.

## GROUP WORK

You will be assigned to a team during our initial class session and will work with that group to prepare and deliver presentations. Since each individual enters the course with a unique background and skill set, you are strongly encouraged to identify, learn from, and leverage each others' strengths.

## COURSE STRUCTURE

Our initial class session will provide an introduction to the course and an overview of business case analysis. Weeks 2-5 will consist of a blend of practical and conceptual discussion, with a new case assigned each week. These classes will begin with team presentations of their analysis and recommendations for that week's case, followed by a discussion of concepts and frameworks relevant to case analysis. Our final class session will be devoted entirely to team presentation of the two capstone cases, and will be spread out over two days (Wednesday, October 14 / Thursday, October 15) to ensure that we have sufficient time for all teams to present. Each team will be assigned **one** of the capstone cases; you are only required to attend the session in which your team is presenting.

During weeks 2-4, your team will be assigned **two** of the four cases to present to the class. Your task is to analyze the case and prepare a presentation with your recommendations for the manager / firm. For weeks where your team is presenting, you are also required to participate in the Practicum session. In general, the timeline for preparing your team's presentation is as follows:

- Begin by reading the case on your own to assess the situation, identify key problems / issues, lay out options for the firm, and propose a specific course of action. Aim to do this on **Thursday / Friday**.
- Next, meet with your team to discuss the case, exchange perspectives, and develop new insights. Arrive at a consensus about what the firm should do, then develop a 10-minute presentation summarizing your analysis and recommendations. In general, this meeting should take place **over the weekend**.

- Working with your team, rehearse your presentation in front of the TA and your fellow students during **Tuesday's Practicum**. You will receive feedback on the strengths and weaknesses of your presentation, analysis, and recommendations. In turn, you will be asked to provide feedback to the other two teams participating in that week's Practicum session.
- On **Tuesday afternoon / evening**, reflect on the feedback as a team and make whatever changes you deem necessary. Then, working on your own, prepare a brief (1 page) document summarizing your assessment of the main problem facing the firm, the key issues that need to be considered, any relevant analysis, the 3-4 alternatives that should be considered, and your recommendations for how to proceed. You will submit this document for grading.
- At the beginning of our regular class session on **Wednesday**, working in your group, deliver your presentation. You will then receive additional feedback.

The course will conclude with a final week in which all teams will prepare a case and present to an expert panel of Sprott faculty members who will challenge you with questions and assess your performance.

**DROP COURSE POLICY:**

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

**GRADING SCHEME**

Your grade for this course will be computed from the following components:

1. Short Case Analyses (4 × 10%)	40%
2. Contribution to Class Discussion	15%
3. Practicum	20%
4. Final Case Presentation (Group Assignment)	25%
<b>TOTAL</b>	<b>100%</b>

Each component of your grade will be assigned a percentage score. Your final course grade will be a weighted average of each of these components. **Note that all final grades are subject to approval by the Dean.**

**NOTE: There is NO final exam in this course.**

**1. Short Case Analyses (4 X 10% Each) – Individual Assignment**

Each week, a specific case will serve as the basis for much of the day's practical discussion. Regardless of whether your team is presenting, you will need to submit a short analysis of this case in the form of a 1-page written report. (See Appendix A for a case analysis template.) These reports will be individually graded and will serve as the basis for 40% of your course grade.

**2. Contribution to Class Discussion (15%)**

In each Lecture/Discussion we will actively discuss business concepts and analytical frameworks, and apply them to the assigned case. You are expected to contribute meaningfully to this discussion. Your grade will depend on three factors: presence, preparation, and positive contribution to the class. Students who are absent from class will not earn contribution credit for that week. Likewise, students who attend class but do not contribute substantively or positively to the discussion will receive minimal credit. Preparation and active participation in this hands-on and practice-focused course is the expectation. Examples of meaningful contribution include (but are not limited to):

- Raising or answering important questions
- Commenting on issues raised by the instructor or other students
- Mentioning relevant items of interest from the media or personal experiences
- Offering constructive criticism of another's ideas

### **3. Practicum (20%)**

Beginning in Week 2, the Lecture/Discussion will be preceded by a Practicum, the aim of which is to give teams presenting that week an opportunity to rehearse their presentations and receive feedback. These sessions will be led by the course TA, and will take place on Tuesdays from 10:00-11:30 a.m. in our usual classroom. Each Practicum session will involve three teams, meaning that your team will only attend two sessions.

**NOTE: Attendance is mandatory at the two Practicum sessions to which your team has been assigned.**

The Practicum is intended to be a shared learning experience. During each session, each of the three participating teams will have 25 minutes to deliver their presentation, receive feedback, and ask questions to ensure they are on the right track. When not presenting, the other two teams will observe the presentations of their peers in order to provide constructive feedback and learn from their strengths and weaknesses. Your grade for this component of the course will be based on the quality of the verbal and written feedback you provide to the other teams, as assessed by the TA.

### **4. Final Case Presentation (25%) – Team Assignment**

During our final week of class, all six teams will have an opportunity to present their analysis of the assigned capstone case. Presentations should be 20 minutes in length, and will be followed by an opportunity for Q&A and feedback from special guest judges. Your presentation will be evaluated on both content and style, and all team members will receive the same grade (subject to adjustment based on peer evaluation).

**NOTE: A written report is NOT required on the day of this presentation.**

### **COURSE POLICIES**

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

**Recording of Presentations.** Each week, presentations will be videotaped and made available for review by the teams. Students not comfortable with this component should speak with the instructor at the first class. When possible, invited guests will attend classes for presentations and share feedback with teams.

**Classroom Distractions.** Because of their potential to disrupt classroom discussion, mobile communications

devices should be turned off while in class. If special circumstances require you to keep your device turned on, please discuss this with me prior to class. Laptops are permitted in class for course-related activities, but please do not use your laptop for other purposes (e.g., surfing, e-mailing) since these can be distracting. Inappropriate classroom use of laptops will be noted and will negatively affect your participation grade.

**Course Website.** The website for this course can be accessed through cuLearn. You are encouraged to visit the site regularly for announcements and supplementary course materials, including PowerPoint slides and information related to course assignments. Assignment grades will also be posted to cuLearn as soon as they become available. If you are not familiar with the use of cuLearn, consult the Carleton University help page at <http://carleton.ca/culearnsupport/>.

**Email Policy.** I do not generally respond to e-mails over the weekend. During the week, I will strive to answer your e-mails within 48 hours, although some of my responses may be quicker. Please note that I expect regular attendance and will not provide e-mail answers to questions that have already been asked and answered in class; please consult your classmates in such cases.

**Food / Drink.** Since our class takes place in the morning, I recognize that some students may wish to eat or drink during class. This is fine. However, in consideration of your classmates, please avoid food with strong odors or loud/crinkly packaging, and be discreet when eating.

**Peer Evaluation for Group Work.** To deter social loafing and ensure fairness in grading, peer evaluation will be used for the final case presentation. The specific procedure will be as follows: Each member will take 100 points and allocate those points to their group members (including him or herself) to reflect the contributions made by each member. So, for instance, if there are 3 members in a group and everyone contributed equally, each individual would receive 33⅓ points. Conversely, if an individual contributed relatively little, the remaining group members might allocate few points to that member. To ensure that these peer evaluation scores are reasonable and free from personal bias, you will be asked to provide a detailed written explanation for your point allocation.

## **ADDITIONAL INFORMATION**

### **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).

**Group Work.** The Spratt School of Business encourages group assignments, as these provide students with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. When completing group assignments, you may find it useful to consult the resources available at <http://spratt.carleton.co/students/undergraduate/bcom/forms/>. 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 coordinator 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/> 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://www2.carleton.ca/sasc/advisingcentre/academic-integrity/>.

**Important Dates and Deadlines.** See <http://sprott.carleton.co/students/mba/dates-deadlines/>.

## SESSION SCHEDULE

Date	Topic & Chapters	Deliverables
CLASS Sept. 9	<b>Part 1:</b> COURSE OVERVIEW & EXPECTATIONS <b>Part 2:</b> HOW TO APPROACH CASE ANALYSIS <b>Part 3:</b> BUSINESS PRESENTATION SKILLS	None
PRACTICUM Sept. 15	PRACTICE PRESENTATIONS – Case 1: Able Translations: International Strategy at the Crossroads (Ivey <a href="#">9B15M009</a> )	None
Sept. 16	<b>NO CLASS (Rescheduled to Friday, Sept. 25)</b>	
PRACTICUM Sept.22	PRACTICE PRESENTATIONS – Case 2: Paris Baguette: The Expansion Question (Ivey <a href="#">9B15M014</a> )	None
CLASS Sept. 23	<b>Part 1:</b> TEAM PRESENTATIONS – Case 1: Able Translations: International Strategy at the Crossroads  <b>Part 2:</b> DEFINING THE PROBLEM & IDENTIFYING KEY ISSUES	<ul style="list-style-type: none"> <li>▪ Individual Written Case Analysis for Case 1</li> <li>▪ Team Presentation: Case 1</li> </ul>
CLASS Sept. 25 (Friday) 8:35-11:25 DT 1020	<b>Part 1:</b> TEAM PRESENTATIONS – Case 2: Paris Baguette: The Expansion Question  <b>Part 2:</b> ANALYSIS: APPLYING STRATEGIC FRAMEWORKS	<ul style="list-style-type: none"> <li>▪ Individual Written Case Analysis for Case 2</li> <li>▪ Team Presentation: Case 2</li> </ul>

Date	Topic & Chapters	Deliverables
PRACTICUM Sept. 29	PRACTICE PRESENTATIONS – Case 3: L’Atelier Art Lounge: Times of Uncertainty (Ivey <a href="#">9B14M139</a> )	None
CLASS Sept. 30	<b>Part 1:</b> TEAM PRESENTATIONS – Case 3: L’Atelier Art Lounge: Times of Uncertainty  <b>Part 2:</b> GENERATING AND EVALUATING ALTERNATIVES	<ul style="list-style-type: none"> <li>▪ Individual Written Case Analysis for Case 3</li> <li>▪ Team Presentation: Case 3</li> </ul>
PRACTICUM Oct. 6	PRACTICE PRESENTATIONS – Case 4: National Dairy: Defending Market Leadership (Ivey <a href="#">9B15A001</a> )	None
CLASS Oct. 7	<b>Part 1:</b> TEAM PRESENTATIONS – Case 4 National Dairy: Defending Market Leadership  <b>Part 2:</b> MAKING RECOMMENDATIONS & ACTION PLANS	<ul style="list-style-type: none"> <li>▪ Individual Written Case Analysis for Case 4</li> <li>▪ Team Presentation: Case 4</li> </ul>
PRACTICUM Oct. 13	Practice Final Presentations	None
CLASS (DT 328) Oct. 14	FINAL TEAM CASE PRESENTATIONS	Final Case Presentations: United Daily News Group (A) (Ivey <a href="#">9B15M075</a> )
CLASS (DT328) Oct. 15 (Thursday)	FINAL TEAM CASE PRESENTATIONS	Final Case Presentations: Tesla’s China Drive (Ivey <a href="#">9B15M024</a> )



**BUSI 5106**  
**Business Case Analysis**

**MEMO**

**Date:**

**To:**

**From:**

**Re:**

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[Write introductory paragraph for memo here]

[Summarize each of the following in the spaces below as part of the memo format]

1. **PROBLEM:** What is the main (underlying) problem/opportunity in this case?

2. **ISSUES:** What are all of the issues relevant to this case?

3. ANALYSIS: Use a framework (PEST, Porter, SWOT, etc.) to analyze the issues in this case

4. ALTERNATIVES: What solutions can you think of?

5. RECOMMENDATIONS: What would you do? Why?