



BUSI 5106 A (0.25 credit)
Business Case Analysis and Presentations
Fall 2 – 2024

Instructor: Julie Caldwell, MBA

Email: julie.caldwell@carleton.ca

Phone: Cell - 613-878-5842
Office - 613-520-2600 x7300

Office: Suite 3500 CTTC Building

Office Hours: By appointment only – email me and we'll coordinate a mutually convenient date/time to chat on the phone, over zoom or in-person

Class Meeting:

Wednesdays from 8:35am to 11:25am

Course Calendar 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. Includes: Experiential Learning Activity

Course Description:

Using a variety of case studies and scenarios from real-world business environments, this course aims to provide students with an opportunity to learn how to use critical thinking and analysis skills to make informed business decisions at a given point in time. In addition, students will learn how to succinctly present their recommendations in brief written formats using business memos and professional business presentations.

Course Learning Objectives:

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

Course Prerequisites:

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

Required Materials:

Student will be required to access a variety of case studies which will be available at no cost through the Carleton University Ares online system. There are no required textbooks. Cases will include:

- Crisis at Binghamton Zoo
- Calveta Dining Services, Inc.: A Recipe for Growth
- Yushan Bicycles: Learning to Ride Abroad

- Blake Sports Apparel and Switch Activewear: Bringing the Executive Team Together
- Uber Technologies, Inc.

Final Exam Date:

There is no final exam for this course but there is a final team presentation and business memo, which will be due during exam week.

Drop Course Policy:

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

Grading Scheme and Course Structure:

1. Short Case Analyses Memo (2 X 10% each)	20% individual
2. Short Case Analyses Memo (2 x 5% each)	10% team
2. Team Presentation (2 x 10% each)	20% individual / team
3. Final Case Presentation and Memo	30% individual / team
4. Course Reflection Memo	15% individual
5. Course Engagement	5% individual
TOTAL	100%

Short Case Analyses Memo (2 x 10% = 20%) Individual

Each person will be required to submit 2 short case analyses, in the form of a written business memo, with no less than 600 words and no more than 1200 words in length. A short case analysis template will be provided. The assignment is to be uploaded to Brightspace by 11:59pm EST on the due date (see detailed course schedule for deadlines).

Short Case Analyses Memo (2 x 5% = 10%) Team Based

In the 2 weeks that a team is doing an in-class presentation, those teams will be required to submit ONE short team case analysis, in the form of a written business memo, with no less than 600 words and no more than 1200 words in length. A short case analysis template will be provided. The assignment is to be uploaded to Brightspace by 11:59pm EST on the due date (see detailed course schedule for deadlines).

In-Class Case Presentation (2 x 10% = 20%) Team /Individual

Each team will be required to make 2 x full-team presentations to the class. In-class presentations will be no less than 8.5 minutes and no more than 10 minutes in length. A copy of the PPT presentation, including the speaking notes for each slide will be required to be submitted to Brightspace by 11:59pm EST on the due date (see detailed course schedule for deadlines). *NOTE: it is possible for students to end up with different marks for the presentation component as grades will be allocated to both individual and team performance.*

Final Case Presentation and Memo (30%) Individual / Team

The team presentation and memo are in place of a final exam. Teams will be required to:

- 1) Conduct a case analysis on the assigned case;
- 2) Prepare a 15-minute presentation of the overall analysis and recommendations including the use of PPT slides. Each member of the team will be required to include their speaking notes in the NOTES section of each page of the PPT along with the name of the person speaking to that section. The presentation will be made live in front of the class. Teams are to conduct themselves professionally, as if presenting as a group of consultants to a potential client; and
- 3) Submit ONE written business recommendation memo for the team. The memo will be no less than 1,000

words and no more than 2,000 words in length, following the appropriate format. Marks will be allocated as follows:

- 15% for team memo
- 15% for group presentation and PPT notes (*NOTE: it is possible for students to end up with different marks for the presentation component as grades will be allocated on both individual and team performance.*)

Course Reflection Memo (15%) Individual

At the end of the course, each student will be required to complete a course reflection memo which will allow them to reflect on their experiences and learning, both as an individual and as a member of a team. The memo will be no less than 500 words and no more than 1500 words. It is to be uploaded to Brightspace by 11:59pm on the deadline.

Course Engagement (5%) Individual

Each week, the class will actively discuss cases, concepts and present analyses and recommendations. Participation marks will depend on overall attendance during classes and structured participation requirements during presentations and discussions. Preparation and active participation in this hands-on and practice-focused course, is the expectation.

Detailed Course Schedule

You are NOT required to read a case in preparation for the first class, but you are required to visit the BUSI 5106A Brightspace course page to ensure that you are familiar with course requirements, and to learn about course cases that you will need to access. The page will be available as of **Monday, October 21, 2024**, if not before. Below is a detailed breakdown of the course format, deliverables and expectations for course load.

Date	Topic
<p>CLASS #1 Weds. Oct. 30 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Review course modules to ensure access to required cases and reference materials. <p>DURING CLASS:</p> <ul style="list-style-type: none"> ▪ No need to prepare anything for this class but students will be expected to be available in class for the entire period. ▪ Lecture will take place. <p>DELIVERABLE FOR NEXT CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #1 (only teams 1 and 3 are required to present) ▪ Individual Case Analysis Memo for Case #1 (INDIVIDUAL members from team 2 and 4 are required to submit a case analysis memo and teams 1 and 3 are required to submit ONE team memo) ▪ Final Team PPT’s and individual case memos are to be uploaded to Brightspace by 11:59pm on Tues. Nov. 5th. <p>Case for Week 2: Case #1 – Binghampton Zoo</p>
<p>CLASS #2 Weds. Nov. 6 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Come prepared having read the assigned case for the week <p>DURING CLASS:</p>

	<ul style="list-style-type: none"> ▪ Team Presentation for Case #1 (only teams 1 and 3 are required to present) ▪ Class Discussion and Debrief of presentations ▪ Lecture <p>DELIVERABLE FOR NEXT CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #2 (only team 2 and 4 are required to present) ▪ Individual Case Analysis Memo for Case #2 (INDIVIDUAL members from teams 1 and 3 are required to submit a case analysis memo and team 2 and 4 are required to submit ONE team memo) ▪ Final Team PPT's and individual case memos are to be uploaded to Brightspace by 11:59pm on Tues. Nov. 12th. <p>Case for Week 3: Case #2: <i>Calveta Dining</i></p>
<p>CLASS #3 Weds. Nov. 13 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Come prepared having read the assigned case for the week <p>DURING CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #2 (only team 2 and 4 are required to present) ▪ Class Discussion and Debrief of presentation ▪ Lecture <p>DELIVERABLE FOR NEXT CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #3 (only teams 1 and 3 are required to present) ▪ Individual Case Analysis Memo for Case #3 (INDIVIDUAL members from team 2 and 4 are required to submit a case analysis memo and teams 1 and 3 are required to submit ONE team memo) ▪ Final Team PPT's and individual case memos are to be uploaded to Brightspace by 11:59pm on Tues. Nov. 26th. <p>Case for Week 4: Case #3: <i>Yushan Bicycles</i></p>
<p>THERE WILL BE NO CLASS THE WEEK OF NOV 20th</p>	
<p>CLASS #4 Weds. Nov. 27 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Come prepared having read the assigned case for the week <p>DURING CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #3 (only teams 1 and 3 are required to present) ▪ Class Discussion and Debrief of presentations ▪ Lecture <p>DELIVERABLE FOR NEXT CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #4 (only team 2 and 4 are required present) ▪ Individual Case Analysis Memo for Case #4 (INDIVIDUAL members from teams 1 and 3 are required to submit a case analysis memo and team 2 is required to submit ONE team memo) ▪ Final Team PPT's and individual case memos are to be uploaded to Brightspace by 11:59pm on Tues. Dec. 3rd. <p>Case for Week 5: Case #4: <i>Blake Sports Apparel</i></p>

<p>CLASS #5 Weds. Dec. 4 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Come prepared having read the assigned case for the week <p>DURING CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #4 (only team 2 and 4 are required to present) ▪ Class Discussion and Debrief of presentation ▪ Lecture <p>DELIVERABLE FOR NEXT CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #5 (ALL teams are required present) ▪ All teams are required to present ONE team-based case analysis memo for Case #5 ▪ Final Team PPT's and team-based case memos are to be uploaded to Brightspace by 11:59pm on Tues. Dec. 10th. <p>Case for Week 6: Case #5: <i>Uber</i></p>
<p>CLASS #6 Weds. Dec. 11 8:35am to 11:35 am</p>	<p>BEFORE COMING TO CLASS:</p> <ul style="list-style-type: none"> ▪ Come prepared having read the assigned case for the week and be prepared for final presentations <p>DURING CLASS:</p> <ul style="list-style-type: none"> ▪ Team Presentation for Case #5 (ALL teams are required to present) ▪ Class Discussion and Debrief of ALL presentations <p>FINAL COURSE DELIVERABLE:</p> <ul style="list-style-type: none"> ▪ Course reflection memo to be completed INDIVIDUALLY and uploaded to Brightspace by 11:59pm on Sat. Dec. 14th

Late Assignments, Deferred Final Presentation and Written Deliverables:

To ensure fairness for all students, penalties will be applied to late assignments: Failure to submit an assignment on time will result in an initial penalty of five (5) percentage points, followed by an additional (2) percentage points per day thereafter. For example, an assignment that would normally merit a grade of 80% would receive a grade of 75% if submitted after the deadline on the due date, 73% if submitted the following day, and so on. Requests for extension will be considered in cases of illness, family emergency, or other exceptional circumstances.

Students unable to complete course deliverables and/or participate in the final presentation and/or contribute to the final assignment because of illness or other circumstances beyond their control, must contact the instructor in writing to determine alternate arrangements. Permission 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 Communication:

Information on weekly assignments and other general information will be communicated to you by email, during class on a regular basis and through the course learning platform, Brightspace. All supporting documents and details regarding upcoming assignments will be posted to the course webpage through Brightspace. **It is your responsibility to visit Brightspace regularly** to ensure you are keeping up with the course requirements and if you are uncertain at any time of what is required, to please speak with me as soon as possible.

Contribution to Program Learning Goals ([MBA](#)):

MBA Learning Goal	Not Covered	Introduced	Taught but Not Assessed	Taught and Assessed
MB1 Leadership and Collaboration <i>Graduates will be equipped for leadership and collaboration.</i>				✓
MB2 Communication <i>Graduates will be effective communicators</i>				✓
MB3 Critical Thinking and Problem Solving <i>Graduates will be skilled in critical thinking and problem solving.</i>				✓
MB4 Functional Knowledge <i>Graduates will have functional knowledge of all areas of business.</i>			✓	
MB5 Global Business <i>Graduates will have an appreciation of the global environment of business.</i>			✓	
MB6 Ethical Reasoning <i>Graduates will be skilled in ethical reasoning and decision-making.</i>				✓

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).

Group Work:

The Sprott School of Business encourages group assignments. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, followership and other group skills. Group assignments are also an effective way to learn integrative skills for putting together a complex task. Your professor may assign one or more group tasks, assignments, or 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. There is no formal peer assessment as part of the course requirements.

Letter Grades:

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 F = Below 50
 A = 85-89 B = 73-76 C = 63-66 D = 53-56

A - = 80-84 B - = 70-72 C - = 60-62 D - = 50-52

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:

Carleton is committed to providing academic accessibility for all individuals. You may need special arrangements to meet your academic obligations during the term. The accommodation request processes, including information about the *Academic Consideration Policy for Students in Medical and Other Extenuating Circumstances*, are outlined on the Academic Accommodations website (students.carleton.ca/course-outline).

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

- **Pregnancy**

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: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

- **Religious Obligations**

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: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

- **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. <https://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: <https://carleton.ca/sexual-violence-support/>

- **Student Activities**

Carleton University recognizes the substantial benefits, to both the individual student and the university,

that result from participating in activities beyond the classroom experience. Reasonable accommodation will 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: <https://students.carleton.ca/course-outline/>

Academic Integrity:

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 cooperation or collaboration or completing work for another student—are a serious academic offence, 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/>

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: <https://carleton.ca/csas/>

Other 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 email account. If you do not have or have yet to activate this account, you can do so by visiting <https://carleton.ca/its/get-started/new-students-2/>

Covid-19 Information:

It is important to remember that COVID is still present in Ottawa. The situation can change at any time and the risks of new variants and outbreaks are very real. There are [a number of actions you can take](#) to lower your risk and the risk you pose to those around you including being vaccinated, wearing a mask, staying home when you’re sick, washing your hands and maintaining proper respiratory and cough etiquette.

Feeling sick? Remaining vigilant and not attending work or school when sick or with symptoms is critically important. If you feel ill or exhibit COVID-19 symptoms do not come to class or campus. If you feel ill or exhibit symptoms while on campus or in class, please leave campus immediately. In all situations, you must follow Carleton’s [symptom reporting protocols](#).

Masks: Carleton has paused the [COVID-19 Mask Policy](#), but continues to strongly recommend masking when indoors, particularly if physical distancing cannot be maintained. It may become necessary to quickly reinstate the mask requirement if pandemic circumstances were to change.

Vaccines: Further, while proof of vaccination is no longer required as of May 1 to attend campus or in-person activity, it may become necessary for the University to bring back proof of vaccination requirements on short notice if the situation and public health advice changes. Students are strongly encouraged to get a full course of vaccination, including booster doses as soon as they are eligible, and submit their booster dose information in [cuScreen](#) as soon as possible. Please note that Carleton cannot guarantee that it will be able to offer virtual or hybrid learning options for those who are unable to attend the campus.

All members of the Carleton community are required to follow requirements and guidelines regarding health and safety which may change from time to time. For the most recent information about Carleton's COVID-19 response and health and safety requirements please see the [University's COVID-19 website](#) and review the [Frequently Asked Questions \(FAQs\)](#). Should you have additional questions after reviewing, please contact covidinfo@carleton.ca.