



CARLETON UNIVERSITY
SPROTT SCHOOL OF BUSINESS
BUSI4400 /SECTION A
2015 FALL
IS STRATEGY, MANAGEMENT AND ACQUISITION

Instructor: Dr. Shaobo Ji
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Office Hours: TBD
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Course meets: Thursdays 8:35 – 11:25am (September 3 to Nov. 26, 2015)

Pre-requisites & precluded Courses: fourth-year standing, BUSI 2400 and BUSI 3103 with a grade of C- or higher in each

Course Calendar description from the 2015/2016 University calendar:

BUSI 4400 [0.5 credit]

IS Strategy, Management and Acquisition

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.

Prerequisite(s): fourth-year standing, BUSI 2400 and BUSI 3103 with a grade of C- or higher in each.

Lectures three hours a week.

ACM/AIS description: This course explores the issues and approaches in managing the information systems function in organizations and how the IS function integrates / supports / enables various types of organizational capabilities. It takes a senior management perspective in exploring the acquisition, development and implementation of plans and policies to achieve efficient and effective information systems. The course addresses issues relating to defining the high-level IS infrastructure and the systems that support the operational, administrative and strategic needs of the organization. The remainder of the course is focused on developing an intellectual framework that will

allow leaders of organizations to critically assess existing IS infrastructures and emerging technologies as well as how these enabling technologies might affect organizational strategy. The ideas developed and cultivated in this course are intended to provide an enduring perspective that can help leaders make sense of an increasingly globalized and technology intensive business environment.

Course Description and Objectives:

Learning objective

Students will learn to

1. Understand the various functions and activities within the information systems area, including the role of IT management and the CIO, structuring of IS management within an organization, and managing IS professionals within the firm.
2. View an organization through the lens of non-IT senior management in deciding how information systems enable core and supportive business processes as well as those that interface with suppliers and customers.
3. Understand the concepts of information economics at the enterprise level.
4. Appreciate how IS represents a key source of competitive advantage for firms.
5. Structure IS-related activities to maximize the business value of IS within and outside the company.
6. Understand existing and emerging information technologies, the functions of IS and its impact on the organizational operations.
7. Evaluate the issues and challenges associated with successfully and unsuccessfully incorporating IS into a firm.
8. Understand how strategic decisions are made concerning acquiring IS resources and capabilities including the ability to evaluate the different sourcing options.
9. Apply information to the needs of different industries and areas.
10. Understand the role of IT control and service management frameworks from the perspective of managing the IS function in an organization.

Topic

1. The IS function
2. IS strategic alignment
3. Strategic use of information
4. Impact of IS on organizational structure and processes
5. IS economics
6. IS planning
7. Role of IS in defining and shaping competition
8. Managing the information systems function
 - a. IS leadership: The role of the CIO and IS management
 - b. Structuring the IS organization
 - c. Hiring, retaining, and managing IS professionals

- d. Managing a mixed set of internal and external resources
- e. Determining staffing skills allocation models
- 9. Financing and evaluating the performance of information technology investments and operations
- 10. Acquiring information technology resources and capabilities
 - a. Acquiring infrastructure capabilities
 - b. Sourcing information systems services
 - c. Sourcing information systems applications
- 11. Using IS/IT governance frameworks
- 12. IS risk management
 - a. Managing business continuity
 - b. Managing security and privacy

Required textbook:

Robert D. Austin, Richard L. Nolan, Shannon O'Donnell (2009) *The Adventures of An IT Leader*, Boston, MA: Harvard Business Press. (ISBN: 9781422146606). Additional readings are listed below and included in the course schedule.

List of reading:

1. Carleton University, An Information Technology Strategy for the University – Building the Foundation 2013-2016, August 2013, Retrieved on July 16, 2015 from <http://carleton.ca/itstrategy/wp-content/uploads/CU-IT-Strategy.pdf>.
2. Kappelman, L., McLean, E., Johnson, V., and Gerhart, N. (2014) The 2014 SIM IT Key Issues and Trends Study, *MIS Quarterly Executive*, 13(4), pp. 237-263. (Available from Carleton University's Library – [here](#))

Course Requirements & Methods of Evaluation:

The course will primarily be based around cases and readings from the textbook as well as other sources that illustrate key issues in information systems strategy, management and acquisition. Students will be expected to actively participate in the discussions and all class activities. The final course grade will be determined as follows:

TYPE	%
1. Individual class participation	20%
2. Individual assignment (10 @ 2%)	20%
3. Individual term project (a case study)	20%
4. Team technology report and class presentation/discussion	20%
5. In-class final examination	20%
Total	100%

1. Individual class participation (20%)

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 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 grade 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.

2. Individual assignment/case write-up (20%) (Week 2 to Week 11)

As part of the learning experience in this course we will analyze cases included in the textbook (a collection of 18 mini-cases). Each student will be required to submit a total of ten (10) individual case write-ups, with each consisting of two (2) pages of several questions which will be assigned throughout the term. **The deadline for each assignment is midnight, Wednesdays.** Submission should be done online and by email. There will be no make-up for those missed.

3. Individual term project (a case study) (20%)

Each student is required to conduct a case study of an information system in an organization of her/his choice. The case study should focus on a particular issue or theme related to the implementation or use of a system. Issues include IS strategic planning, IT governance, IT project management, IT service management, IT and change management, post implementation performance review, training, among others. Students are required to conduct background research and interview at least two people in an organization regarding the issue of interest. Ideally interviews should be conducted with both IT and business personnel. Each student will prepare a write-up of the case consisting of no more 5000 words. The case studies should be analytical and go beyond a mere description of the situation in the organizations. They should emphasize the issues of IS strategy, management, and acquisition being tackled and include recommendations on how key challenges or opportunities might be addressed. For choice of topics, please refer to Learning Objective and Topic section of this document.

Deliverables:

Deliverables for the term project include the following: a project proposal and a final term project report.

The term project proposal should provide a brief background (1 page) on the issue that has been assigned. 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. **The term project proposal is due on the 3rd week of the class (i.e., September 17, 2015).**

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 than 5000

words in length, excluding appendices and illustrations. The project submitted should be original work. A student 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. **The final term project report is due on December 3, 2015, i.e., one week after the last class.**

4. Technology report, class presentation and class discussion leadership (20%)

This a team assignment. As a member of a team of 3-4 individuals, students are required to participate in a research project on a particular (information) technology, e.g., big data, cloud computings, mobile, smart machines, social media technologies, etc. or a particular information systems, e.g., electronic medical records (EMR), CRM/ERP/SCM, etc. In particular, each team is asked to provide a report on a technology of their choice (subject to the approval of the instructor) from the follow aspects WHAT, USE, IMPACT, and MANAGEMENT. In addition, each team is required to present the technology and lead the class discussion. Each team is required to select a particular technology, with the approval of the instructor, prepare a written report, present the findings to the class, and lead the class discussion.

Deliverables:

Deliverables for the Technology Report include a written technology report (10%) and a class presentation and class discussion leadership (10%).

The written report should be limited to no more than 10 pages (double space, 12 Time New Roman font size) and it must include the descriptions of WHAT the technology/or system is, HOW it is used (by individual or organization), what are the (potential) IMPACTS on individual/group/organization/society, and what are the ORGANIZATIONAL and MANAGERIAL issues associated with the technology. The written technology report is due on one week after the last day of the class, i.e., December 3, 2015.

Team technology presentations and class discussion leadership are scheduled between week 4 (September 24) and week 11 (November 19).

Tentative Class Schedule

Date	Topic / Activity	Case / Chapter	Reading	Assignment
1.Sept. 3	<ul style="list-style-type: none"> • Introduction and Class Organization • Course overview • IT strategy, management, and acquisition: an organizational perspective (IT/IS USE, IT/IS IMPACT, and MANAGEMENT OF IT/IS) 	Team organization (for technology report and class presentation)	Kappelman, L., McLean, E., Johnson, V., and Gerhart, N. (2014) Carleton IT Strategy 2013-16	
2.Sept. 10	<ul style="list-style-type: none"> • Managing the information systems function • IS leadership: The role of the CIO and IS management 	Ch. 1: The new CIO Ch. 2: CIO challenges Ch. 3: CIO leadership		Refer to assignment schedule.
3.Sept. 17	<ul style="list-style-type: none"> • IT cost and value • Role of IS in defining and shaping competition • IS Economics • Financing and evaluating the performance of information technology investments and operations 	Ch. 4: the cost of IT Ch. 5: the value of IT		Refer to assignment schedule. Individual term project proposal is due.
4.Sept. 24	<ul style="list-style-type: none"> • Measuring IT performance • Acquiring information technology resources and capabilities – Building IT capabilities • Technology presentation and class discussion – TEAM#1 	Ch. 6: Project Management Ch. 7: The Runaway Project		Refer to assignment schedule.
5.Oct. 1	<ul style="list-style-type: none"> • Using IS/IT governance framework • Governing and aligning the information systems with organization business goals • Technology presentation and class discussion – TEAM#2 	Ch. 8: IT Priorities Ch. 9: IT and the board of directors		Refer to assignment schedule.
6.Oct. 8	<ul style="list-style-type: none"> • Managing crisis • Communication and coordination • Technology presentation and class discussion – TEAM#3 	Ch. 10: Crisis Ch. 11: Damage Ch. 12: Communication		Refer to assignment schedule.
7.Oct. 15	<ul style="list-style-type: none"> • Technology adoption • Managing emerging technologies • Technology presentation and class discussion – TEAM#4 	Ch. 13: Emerging technology		Refer to assignment schedule.

Date	Topic / Activity	Case / Chapter	Reading	Assignment
8. Oct. 22	<ul style="list-style-type: none"> • Acquiring information technology resources and capabilities <ul style="list-style-type: none"> ○ Acquiring infrastructure capabilities ○ Sourcing information systems services ○ Sourcing information systems applications • Procurement • Technology presentation and class discussion – TEAM#5 	Ch. 14: Vendor partnering		Refer to assignment schedule.
9. Nov. 5	<ul style="list-style-type: none"> • Impact of IS on organizational structure and processes • Managing the information systems function <ul style="list-style-type: none"> ○ Structuring the IS organization ○ Hiring, retaining, and managing IS professionals ○ Managing a mixed set of internal and external resources ○ Determining staffing skills allocation models • Technology presentation and class discussion – TEAM#6 	Ch. 15: Managing talent Ch. 16: Standardization and innovation		Refer to assignment schedule.
10. Nov. 12	<ul style="list-style-type: none"> • IS risk management • Managing business continuity • Managing security and privacy • Technology presentation and class discussion – TEAM#7 	Ch. 17: Managing risk		Refer to assignment schedule.
11. Nov. 19	<ul style="list-style-type: none"> • IS profession and CIO career path • Course wrap-up • Technology presentation and class discussion – TEAM#8 (if necessary) • Final examination review 	Ch. 18: Looking forward	Recap: Kappelman, L., McLean, E., Johnson, V., and Gerhart, N. (2014) Carleton IT Strategy 2013-16	Refer to assignment schedule.
12. Nov. 26	<ul style="list-style-type: none"> • In class final examination 			
Dec. 3, 2015	Last day to submit “Individual term project report” and “Team technology report” before 23:59:59.			

*Tentative, may be adjusted based on guest speaker’s availability.

FND:

To reduce instances of miscommunication Carleton introduced a grade FND (Failure with No Deferral) to be assigned to students who fail to meet the minimum in-term performance standards explicitly set out in the outline and applied consistently (i.e., there is no other hidden criteria).

Satisfactory In-term Performance

1. Unless otherwise stated below in item #2, the requirement for Satisfactory In-term Performance is set at 50% of all, not each, pre-final term work (i.e. assignments, participation marks, tests etc.).
2. The criterion/criteria and the standard(s) for Satisfactory In-term Performance are as follow(s):
 - a. Assignments – less than 50%
 - b. Class participation – less than 50%
3. Unsatisfactory In-term Performance in this course will lead to failure in this course (regardless of the performance at the Final exam or final project) **Yes**
FND grade in this course (in case of missed Final exam and/or project) **Yes**

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).

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			

WDN = Withdrawn from the course

ABS = Student absent from final exam

DEF = Deferred (See above)

FND = (Failed, no Deferred) = Student could not pass the course even with 100% on final exam

Academic Regulations, Accommodations, Etc.

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 Accommodations

For Students with Disabilities:

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or pmc@carleton.ca for a formal evaluation. If you are already registered with the PMC, contact your PMC coordinator to send me your **Letter of Accommodation** at the beginning of the term, and 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 me to ensure accommodation arrangements are made. The deadlines for contacting the Paul Menton Centre regarding accommodation for final exams for the December 2015 exam period is November 6, 2015 and for the April 2016 exam period is March 6, 2016.

For Religious Obligations:

Students requesting academic accommodation on the basis of religious obligation 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 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.

For 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; a grade of Failure in 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:

<http://www2.carleton.ca/sasc/advisingcentre/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're 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/support-services/>

Be in the know with what's happening at Sprott: Follow @SprottStudents and find us on Facebook SprottStudents Sprott.

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, it would be easier to respond to your inquiries if you would send all email from your Carleton account. If you do not have or have yet to activate this account, you may wish to do so by visiting <http://carleton.ca/ccs/students/>
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Important Dates and Deadlines – Fall 2015**Fall term: September 2, 2015 – December 7, 2015****September 2**

Fall term begins.

Fall and fall/winter classes begin.

September 4

Classes follow a Monday schedule.

September 7

Statutory holiday. University closed.

September 18

Last day of registration for fall term and fall/winter courses.

Last day to change courses or sections (including auditing) for fall/winter and fall term courses.

September 25-27

Summer deferred final examinations held.

September 30Last day to withdraw from fall term and fall/winter courses with a full **fee adjustment**. Withdrawals after this date will create no financial change to Fall term fees (financial withdrawal).**October 9**

December examination schedule (fall term final and fall/winter mid-terms) available online.

October 12

Statutory holiday. University closed.

October 15

Last day for receipt of applications for admission to an undergraduate degree program for the winter term from applicants whose documents originate from outside Canada or the United States.

October 26-30

Fall break. Classes are suspended.

November 6

Last day to submit Formal Examination Accommodation Forms to the Paul Menton Centre for Students with Disabilities for December examinations.

November 15

Last day for receipt of applications for admission to an undergraduate degree program for the winter term.

November 24, 2015

Last day for tests or examinations in courses below the 4000-level before the final examination period (see Examination Regulations in the Academic Regulations of the University section of this Calendar).

November 25**Final Payment Deadline.** Click **here** for important payment information. **Late charges** may be applied to the student account any time after this date.**December 1**

Last day for receipt of applications from potential winter (February) graduates.

Last day to upload your Master's or PhD thesis for your thesis defence in order to graduate this winter.

December 7

Fall term ends.