

**Commerce 4PA3
Business Policy & Strategic Management
Winter 2023 Course Outline**

**Strategic Management Area
DeGroot School of Business
McMaster University**

COURSE OBJECTIVE

As the capstone to McMaster’s Commerce program, this course is designed to unify your learning experience at the DeGroot School of Business. It is considered one of the most important courses that you will take during your undergraduate degree as it integrates other courses, builds on them, and acts as a stepping-stone to the real world of business. The purpose of this course is to enhance your capacity to do the job of a general manager responsible for strategic performance.

INSTRUCTOR AND CONTACT INFORMATION

Dr. François Neville

Faculty Instructor
nevillef@mcmaster.ca
Office: DSB #201 x21463
C09: Fri 11:30 – 14:20 DSB B107
C10: Wed 11:30 – 14:20 DSB B107
C11: Fri 14:30 – 17:20 DSB AB103
C12: Tue 14:30 – 17:20 DSB B105

Dr. Paul Snowdon

Faculty Instructor
snowdonp@mcmaster.ca
Office: DSB #209 x23968
C01: Thu 11:30 – 14:20 DSB B107
C05: Thu 8:30 – 11:20 DSB AB103
C06: Tue 8:30 – 11:20 DSB AB103
C08: Mon 11:30 – 14:20 DSB AB103

Professor Linda Stockton

Faculty Instructor
stockton@mcmaster.ca
Office: DSB #203 x24436
C02: Tue 11:30 – 14:20 DSB B107
C03: Mon 8:30 – 11:20 DSB AB103
C04: Mon 19:00 – 22:00 DSB AB103
C07: Mon 14:30 – 17:20 DSB AB103

Dr. Nick Bontis

Course Coordinator

TA name:

TA email:

Website: <http://www.bontis.com/4pa3.htm>

COURSE ELEMENTS

Credit Value: 3	Leadership: Yes	IT skills: Yes	Global view: Yes
Avenue: Yes	Ethics: Yes	Numeracy: Yes	Written skills: Yes
Participation: Yes	Innovation: Yes	Group work: Yes	Oral skills: Yes
Evidence-based: Yes	Experiential: Yes	Case Exam: Yes	Guest speaker(s): Yes

COURSE DESCRIPTION

This course is taught primarily through the case-method but also includes readings, lectures, videos, and a simulation. What you will learn in this course has utility for everyone, not just for the person at the top of an enterprise. Increasingly, the responsibility of general management is shared and all managers need to appreciate how their actions contribute to the overall success of an enterprise. The cases and concepts of the course take the total business as the unit of the analysis and the general manager as the key decision-maker. The materials in the course encompass a wide range of industries and issues to provide the greatest depth and breadth of experience.

LEARNING OUTCOMES

Upon completion of this course, students will be able to complete the following key tasks:

- Actively participate in class discussions while empirically defending choices and actions
- Play the role of the main decision-maker(s) while taking all stakeholders into account
- Assess operational health and business performance while forecasting the organization's prospects as it is currently being run
- Calculate industry metrics, marketing data, and financial ratios to defend recommendations
- Define the capabilities essential for the successful development of a business and formulate a strategic plan while considering the organization's capabilities and environmental context
- Identify the important opportunities and challenges facing a business and setting out a course of action for dealing with them
- Implement changes, as necessary, to position the business for the future and detail an action plan that is operationally specific

REQUIRED COURSE MATERIALS AND READINGS

AVENUE: course content, readings, and submissions (http://avenue.mcmaster.ca)	\$ FREE
ZOOM: video platform for virtual classes (http://mcmaster.zoom.us)	\$ FREE
Textbook: <i>Strategic Analysis and Action</i> , 10th Edition, Crossan, et al.	
• e-book online at the Campus Store, OR	\$ 75 CAD
• e-book 6 month-rental online at the Campus Store	\$ 47 CAD
Custom Courseware: Commerce 4PA3 Business Policy / Strategy	
• e-book 6 month-rental online at the Campus Store online	\$ 29 CAD
Capstone Business Simulation (CAPSIM)	
• Team Member Guide download from website (http://www.CapSim.com)	\$ FREE
• Simulation Registration (per student) use credit card	\$ 54 USD
• COMP-XM Registration (per student) use credit card	\$ 15 USD

OPTIONAL COURSE MATERIALS AND READINGS

- | | |
|--|------------|
| • <i>The Strategy Process</i> , Mintzberg, Lampel, Quinn & Ghoshal | \$ 120 CAD |
| • <i>Harvard Business Review's 10 Must Reads on Strategy</i> | \$ 30 CAD |

EVALUATION

Learning in this course results primarily from in-class discussion and participation of comprehensive business cases as well as out-of-class analysis. The balance of the learning results from the lectures on strategic concepts, from related readings, and from researching your presentations, cases, assignments, and projects. Group members will share the same grade.

Assignment	McMaster World Congress (individual)	10%
CAPSIM	1. Introductory Lesson Quiz (individual)	0%
	2. Initial Situational Analysis (shared)	0%
	3. Business Plan (shared)	0%
	4. Capstone Simulation Decisions (shared)	20%
	5. COMP-XM Simulation Decisions (individual)	5%
	6. Peer Evaluation (individual)	5%
MFT	Major Field Test in Business (individual)	5%
Case Exam	Case solution – take home (individual)	30%
Participation	Synchronous in-class participation (individual)	25%
Total		100%

Individual vs. Group Breakdown of Marks

Individual	80%
Group	20%

Activity	Timing	Location
Class Lectures	Synchronous	in classroom
Case Discussion	Synchronous	in classroom
Participation	Synchronous	in classroom
Readings	Asynchronous	prior to class
Case Preparation	Asynchronous	prior to class
CapSim Simulation	Due: 3am Tue. & Thur.	www.CapSim.com

Grade Conversion

Your overall percentage will be converted to a letter grade in accordance with the following:

LETTER GRADE		PERCENT	LETTER GRADE		PERCENT
A+	(12)	90 - 100	C+	(6)	67 - 69
A	(11)	85 - 89	C	(5)	63 - 66
A-	(10)	80 - 84	C-	(4)	60 - 62
B+	(9)	77 - 79	D+	(3)	57 - 59
B	(8)	73 - 76	D	(2)	53 - 56
B-	(7)	70 - 72	D-	(1)	50 - 52
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Communication and Feedback

Students who are uncomfortable in directly approaching an instructor regarding a course concern may send a confidential email to the Course Coordinator.

Students who wish to correspond with instructors or TAs directly via email must send messages that originate from their official McMaster University email account. This protects the confidentiality and sensitivity of information as well as confirms the identity of the student. Emails regarding course issues should NOT be sent to the Area Administrative Assistants.

Instructors are required to provide evaluation feedback for at least 10% of the final grade to students prior to Week #8 in the term.

Instructors may conduct an informal course review with students by Week #4 to allow time for modifications in curriculum delivery.

For the component to be re-evaluated:

- The component must be worth 10% or more of the final grade in the course
- Students pay a fee of \$50 in Gilmour Hall #209 (receipt is then brought to the Student Experience – Academic Office DSB #112)
- The Area Chair will seek out an independent adjudicator to re-grade the component
- An adjustment to the grade for the component will be made if a grade change of three points or greater on the 12-point scale (equivalent to 10 marks out of 100) has been suggested by the adjudicator as assigned by the Area Chair
- If a grade change is made, the student fee will be refunded

Assignment – McMaster World Congress

This assignment is worth **10%** of your final grade and will be marked individually. Students must attend **three (3) sessions** of the McMaster World Congress which takes place on **February 2-3, 2023** at **CIBC Hall, 3rd floor, MUSC**. This event attracts hundreds of attendees who learn from the latest research, case studies and best practices. Of course, students are encouraged to attend as many additional presentations as they wish. 4PA3 students will **NOT** be charged a registration fee. All students must **pre-register** for their sessions on-line. Students will find an agenda from which they can select presentations on the conference website. The conference website is here:

<http://worldcongress.mcmaster.ca>

Each student is required to prepare a concise summary and evaluation of **three (3) presentations**. Each review is limited to **one page** in length and must contain the following three paragraph headings: **1) Summary** – a concise overview of the main content highlighting the presenter(s) and the presentation itself; **2) Evaluation** – a critique of the session (you may wish to comment on the content, implications, methodology, model, measures, conclusions, presentation style, etc.; and **3) Application** – a personal opinion of the usefulness of this presentation as it would apply in business and/or government with a second opinion drawn from another published article or website (full citation is necessary for secondary research reference as a footnote).

- The total report is limited to **3 pages** of text (1 page per presentation)
- Your full name, student #, section #, must be at the top right corner of each page
- Presenter's name, affiliation and title of session must be at the top left corner of each page
- 8.5 X 11-inch paper, 1-inch margins, 12-point font, single spaced, 3 headings are necessary
- Submission is done through **Avenue** and assignments will be validated through **Turnitin.com**
- Submission must be converted and uploaded in **PDF format**
- Assignments that are handed in late will receive a grade of **zero**

Capstone Business Simulation ® – CapSim

The Capstone Business Simulation is a simulation-based game that provides a hands-on environment where students can learn to manage and coordinate business functions from marketing to research and development. Capstone participants divide into competing teams where each team acts as an executive committee responsible for running an electronic sensor company. Students use a combination of decision support software and website support to make decisions about the strategy and direction of their company. The simulation is an exciting way to explore the complexities and challenges of running a business. Most real-world, strategic decisions are made after consultation with key executives and colleagues in an atmosphere of committee deliberations and discussion. Capstone is founded on teamwork as it plays a crucial role in the coordination and execution of strategy. Students are permitted to create their own teams from their section. Team sizes will be confirmed by the TA based on overall class size (we expect to have 5 or 6 students per team). If you have a team selected, please notify the TA as soon as possible. One member of your team will register the new team name on the Capsim website (www.capsim.com) and then the rest of the team members will register and join their specific team. Teamwork is an important aspect of this course. Students who, for personal or job-related reasons, are unable to work in teams are advised to consider this factor carefully. The simulation involves a considerable number of team meetings.

CAPSTONE GROUP DECISIONS

Each team must make decisions about various aspects of a simulated company for a given period of **8 years** that take place over several weeks. Please note that simulation decisions must be uploaded before **3:00 a.m.** Teams will meet regularly outside of class time to analyze the strategic position of their company and to discuss issues, problems, financials, etc. Each firm's objectives are achieved systematically and successfully by considering and applying concepts previously developed in lectures, readings and case discussions. Each team's performance will be evaluated using a **Balanced Scorecard** – more than just a grouping of financial measures, the Balanced Scorecard is a strategic assessment tool that can accurately portray a business unit's strategic progress. An overall score will be calculated from four perspectives: the customer, internal business, innovation & learning, and financial measures. Later years will be weighted more than earlier ones. Teams compete against teams in their industry and across all 4PA3 groups. Each team is required to submit a set of the firm's decisions for each round of the simulation. Based on the results the team achieves, the team will be given a relative ranking across all 4PA3 groups. Any team that goes bankrupt will receive a grade of zero. Emergency loans are permitted. At the end of the simulation, each group member will share the same mark.

INTRODUCTORY LESSON QUIZ

This quiz will be completed individually and reviews the content of the introduction to the simulation. There are no marks for this quiz. The quiz is available directly from the CapSim website.

INITIAL SITUATIONAL ANALYSIS

The Initial Situational Analysis (shared) is not worth any marks but **MUST** be completed by each team. Each team will prepare a **one (1) page report** detailing the status of their company at the start of the simulation. This report will clearly answer the four following questions:

1. How will technology reshape customer expectations over the next 8 years?
2. How will demand increase, and how will that effect your investments in capacity?
3. How much money can you make? Determine the profit potential in a best-case scenario.
4. How will customers perceive you and your competitors today? Is there room for improvement?

Students should pay special attention to this assignment since truly understanding the nature of the simulation and the environment in which the simulation is taking place is crucial to success.

- This report is limited to **1 page** of text (attach as many graphs and tables as you wish)
- SIMID#, company name, section #, all members' names, student #s, must be at top
- 8.5 X 11-inch paper, 1-inch margins, 12-point font, single spaced, converted to **PDF format**
- Submission is done through **Avenue** and assignments will be validated through **Turnitin.com**

BUSINESS PLAN

The Business Plan (shared) is not worth any marks but **MUST** be completed by each team. Each team will prepare a **one (1) page report** detailing the mission statement for their company, the objectives and business strategy they plan to use to attain these objectives as well as details on what market(s) they intend on targeting. These reports will be turned in at the early stages of the simulation. Teams are expected to refer to their business plan during their final oral presentations.

- This report is limited to **1 page** of text (attach as many graphs and tables as you wish)
- SIMID#, company name, section #, all members' names, student #s, must be at top
- 8.5 X 11-inch paper, 1-inch margins, 12-point font, single spaced, converted to **PDF format**
- Submission is done through **Avenue** and assignments will be validated through **Turnitin.com**

COMP-XM INDIVIDUAL DECISIONS

As a follow-up to the group simulation, each student will compete by running an organization individually. Decisions will be uploaded on the system and deadlines must be adhered to carefully. Any student that goes bankrupt will receive a grade of zero. At the end of this individual simulation, a mark worth **5%** of their final grade will be calculated based on relative results.

PEER EVALUATIONS

Students must submit a peer rating for each team member. If you do **NOT** complete a rating for each of your fellow team members, you will personally receive a **zero** grade for this component.

MFT – Major Field Test in Business

The DeGroot School of Business is accredited by the AACSB (Association to Advance Collegiate Schools of Business). To maintain accreditation, the business program must satisfy the expectations of a wide range of quality standards that all are mission linked. The process forces comparisons of our work with international accreditation standards on faculty quality, library, computer facilities, students, and institutional service. It is therefore a form of accountability to the graduates of our program. There are additional benefits that derive from accreditation:

1. The process serves as a catalyst to identify what programs are the best for our students because top administrators must articulate their views to an external evaluation team.
2. Accreditation is key to recruiting high quality faculty on an international level.
3. Accreditation assures students and their parents of the high quality of our undergraduate program and creates greater visibility for students in the job market.
4. It increases the program's appeal to transfer students, helping develop a global reputation.

The Major Field Test measures student academic achievement and assesses the educational outcomes of our undergraduate program. In addition, area groups will use the results of the MFT to evaluate their curricula and measure their progress. The tests also provide students with an assessment of their own level of achievement within a field of study compared to that of students in their program and to international comparative data. The test is designed to assess mastery of concepts, principles, and knowledge expected of students at the conclusion of the undergraduate program. In addition to factual knowledge, the test evaluates students' abilities to analyze and solve problems, understand relationships, and interpret material. The test is two hours in length and is multiple choice. You will receive **five (5) marks** for taking the test. Your performance on the test will **NOT** be reflected in your final 4PA3 grade. However, if you do **NOT** take the test, you will **NOT** receive the marks. Sample questions are available for download from AVENUE. NOTE: All exchange students are **EXEMPT** from taking this test. The 5 marks will be removed from your final grade calculation.

Case Exam – Solution Submission

There is one take home case examination in this course. Each case solution must be completed individually. You will use Avenue for submission and all assignments will be validated through **Turnitin.com**. Your submission must be converted and uploaded in **PDF format**. Students who submit similar solutions (in any way) will be subjected to a review as per the university's **academic integrity policy**. Exams that are handed in late will receive a grade of **zero**. The case exam is considered as the final comprehensive evaluation component of this course. As such, performance on this exam is critical for successful completion of this course. There will be **no make-up case exam**. All students **MUST** complete this exam. Students who do **NOT complete the exam** will **NOT receive a course credit** regardless of their performance in other course components.

Participation

The **case-method** requires students to be cooperative in sharing their views. Instructors and TAs will feel free to **cold call** on anyone at any time. Hence, it is imperative that you prepare for each and every case and reading. In general, contributions are evaluated in an ascending order from good chip shots to quite substantial comments, to case cracking contributions. Debate and challenge are important activities that help in the learning process and the willingness of individuals to engage in such activities with their classmates is appreciated. However, using **airtime** involves an obligation to actually contribute. None of us has time for recitation of case facts, bland summaries of prior discussion, and so on, that are devoid of implications. Before you speak, always answer the question **so-what?** Participation will **NOT** be graded by counting each contribution a student makes. Participation will be graded by examining the quality of contributions in each class.

A student's FULL NAME in the classroom on a name card must be displayed and is used to help give credit for your participation. You **MUST** always attend the same section in this course. If you continue to switch sections throughout the term, you will **NOT** be guaranteed any participation marks for those classes you attend outside your section. Attendance does **NOT** constitute participation. Effective communication is a prerequisite to success in the business world. For that reason, all marks in this course will be based on both the substance of your work and the quality of your written and oral communication. Particularly poor communication could result in a reduction in your overall final mark as great as one or two letter grades. In the past, students who have received the highest grades in this course also had the highest participation marks. They were also the students that contributed high quality insights several times during class. The key to a high participation mark is making numerous quality contributions during **every** case discussion. With respect to case discussions, try to contribute comments that:

- Get the discussion off to a productive start by highlighting the key characters in the case and the main decisions that still need to be made
- Shape the discussion through the meaningful introduction of theoretical concepts, current events, financial calculations, or alternative analysis
- Triangulate case discussions with current events or readings and by matching or referring to previous points made during the class
- Link or contrast the main highlights of this particular case with previous cases

- Change or reverse the direction of the discussion when appropriate and support the alternative hypothesis or opposing view, and
- Summarize and bridge the comments of others without undue repetition.

Immerse yourself in each discussion case by reading it twice, the first time to obtain an overview, the second to flesh out the detail. Make notes to facilitate your contribution to the class discussion. Work with other students when preparing for a case discussion in order to learn from each other. You will get next to nothing out of a case discussion if you are not fully prepared, and you run the risk of being embarrassed if you are called upon to contribute. Your TA will be assigning a grade for participation after each case discussion. Please note participation marks may also be evaluated for homework assignments. Case discussion marks and homework assignments cannot be made up if you miss a class. An interim participation grade will be posted mid-term.

ACADEMIC INTEGRITY

You are expected to exhibit honesty and use ethical behaviour in all aspects of the learning process. Academic credentials you earn are rooted in principles of honesty and academic integrity. Academic dishonesty is to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. This behaviour can result in serious consequences (e.g., the grade of zero on an assignment, loss of credit with a notation on the transcript “Grade of F assigned for academic dishonesty”, and/or suspension or expulsion from the university). It is your responsibility to understand what constitutes academic dishonesty. Please refer to the Academic Integrity Policy:

<http://www.mcmaster.ca/academicintegrity>

The following illustrates only three forms of academic dishonesty:

1. Plagiarism, e.g., the submission of work that is not one’s own or for which other credit has been obtained
2. Improper collaboration in group work
3. Copying or using unauthorized aids in tests and examinations

AUTHENTICITY / PLAGIARISM DETECTION

In this course we will be using a web-based service Turnitin.com which is a plagiarism detection service to reveal authenticity. Students will be expected to submit specific work electronically which will be assessed by Turnitin.com against the internet, published works and Turnitin’s database for similar or identical work. If a student refuses to submit his or her work to Turnitin.com, he or she cannot be compelled to do so and should not be penalized. The assignment can be subjected to a Google search or some other kind of search engine if the instructor wishes.

AVENUE TO LEARN

In this course we will be using Avenue (<http://avenue.mcmaster.ca>). Students should be aware that when they access the electronic components of this course, private information such as first and last

names, usernames for the McMaster e-mail accounts, and program affiliation may become apparent to all other students in the same course. The available information is dependent on the technology used. Continuation in this course will be deemed consent to this disclosure.

ON-LINE ELEMENT

This course may use on-line elements (e.g., e-mail, Avenue to Learn (A2L), Zoom, Top Hat, web pages, etc.). Students should be aware that, when they access the electronic components of a course using these elements, private information such as first and last names, usernames for the McMaster e-mail accounts, and program affiliation may become apparent to all other students in the same course.

REQUESTING RELIEF FOR MISSED ACADEMIC TERM WORK

In the event of an absence for medical or other reasons, students should review and follow the Academic Regulation in the Undergraduate Calendar “Requests for Relief for Missed Academic Term Work” and the link below:

<http://ug.degroote.mcmaster.ca/forms-and-resources/missed-course-work-policy/>

NOTE: The MSAF cannot be used during any final exam period (e.g., for COM 4PA3, this includes the final take-home case exam). All students **MUST** complete the case exam by the deadline or receive zero (0) on the submission.

NOTE: If an attendance conflict does arise, students are encouraged to attend another section during the same week so that they do **NOT** miss any participation grades. It is the student’s responsibility to coordinate this effort with both TAs and should include the reason why this request is being made. In the communication, share the reason why you must miss your scheduled class and ask if there is room for you as seats are limited. Switching may be necessary for a single class in a single week but switching for the entire term or several weeks is prohibited.

ACADEMIC ACCOMMODATION AND STUDENT ACCESSIBILITY SERVICES

Students with disabilities who require academic accommodation must contact Student Accessibility Services (SAS) at 905-525-9140 ext. 28652 or sas@mcmaster.ca to make arrangements with a Program Coordinator. For further information, consult McMaster University’s *Academic Accommodation of Students with Disabilities* policy.

<http://sas.mcmaster.ca>

CONDUCT EXPECTATIONS

As a McMaster student, you have the right to experience, and the responsibility to demonstrate, respectful and dignified interactions within all of our living, learning and working communities.

These expectations are described in the *Code of Student Rights & Responsibilities* (the “Code”). All students share the responsibility of maintaining a positive environment for the academic and personal growth of all McMaster community members, whether in person or online. It is essential that students be mindful of their interactions online, as the Code remains in effect in virtual learning environments. The Code applies to any interactions that adversely affect, disrupt, or interfere with reasonable participation in University activities. Student disruptions or behaviours that interfere with university functions on online platforms (e.g., Avenue), will be taken very seriously and will be investigated. Outcomes may include removal of the involved students’ access to these platforms.

<https://sscm.mcmaster.ca/the-code/>

ACCOMMODATION FOR RELIGIOUS, INDIGENOUS, OR SPIRITUAL OBSERVANCES

Students requiring academic accommodation based on religious, indigenous, or spiritual observances should follow the procedures set out in the RISO policy. Students should submit their request to their Faculty Office **normally within 10 working days** of the beginning of term in which they anticipate a need for accommodation or to the Registrar's Office prior to their examinations.

<https://ug.degroot.mcmaster.ca/files/2019/07/RISO-Form.pdf>

COPYRIGHT AND RECORDING

Students are advised that lectures, demonstrations, performances, and any other course material provided by an instructor include copyright protected works. The Copyright Act and copyright law protect every original literary, dramatic, musical and artistic work, including lectures by University instructors. The recording of lectures, tutorials, or other methods of instruction may occur during a course. Recording may be done by the instructor for the purpose of authorized distribution.

EXTREME CIRCUMSTANCES

The University reserves the right to change the dates and deadlines for any or all courses in extreme circumstances (e.g., severe weather, labour disruptions, etc.). Changes will be communicated through regular McMaster communication channels, such as McMaster Daily News, AVENUE and/or McMaster email. It is the responsibility of the student to check their McMaster email and course websites weekly during the term and to note any changes.

ACKNOWLEDGEMENT OF COURSE POLICIES

Your registration and continuous participation (e.g., on Avenue, in the classroom, etc.) to the various learning activities of Commerce 4PA3 will be considered an implicit acknowledgement of the course policies outlined above, or of any other that may be announced during classes and/or on Avenue. It is your responsibility to read this course outline, to familiarize yourself with the course policies and to act accordingly. Lack of awareness of the course policies cannot be invoked at any point during this course for failure to meet them. It is your responsibility to ask for clarification on any policies that you do not understand.

Commerce 4PA3
Business Policy & Strategic Management
Winter 2023 Course Schedule

SECTION	INSTRUCTOR	DATE	START	END	CLASSROOM
C01	Paul Snowdon	Thursday	11.30	14:20	DSB_B107
C02	Linda Stockton	Tuesday	11.30	14:20	DSB B107
C03	Linda Stockton	Monday	08.30	11:20	DSB AB103
C04	Linda Stockton	Monday	19.00	21:00	DSB AB103
C05	Paul Snowdon	Thursday	08.30	11:20	DSB AB103
C06	Paul Snowdon	Tuesday	08.30	11:20	DSB AB103
C07	Linda Stockton	Monday	14.30	17:20	DSB AB103
C08	Paul Snowdon	Monday	11.30	14:20	DSB AB103
C09	François Neville	Friday	11.30	14:20	DSB B107
C10	François Neville	Wednesday	11.30	14:20	DSB B107
C11	François Neville	Friday	14.30	17:20	DSB AB103
C12	François Neville	Tuesday	14.30	17.20	DSB B105

WEEK	DATE	ASSIGNMENT
1	Mon. Jan. 9 to Fri. Jan. 13	Discuss: course outline, schedule, participation, grading, AVENUE Discuss: Selecting team members for CAPSIM simulation Lecture: Introduction to Strategy and Strategic Process CPD Slides: résumé, cover letter, and job interviews
2	Mon. Jan. 16 to Fri. Jan. 20	Read: SAA (Strategic Analysis and Action) Chapters 1 and 2 Read: Guide to case analysis Read: HBR How competitive forces shape strategy Optional Read: HBR What is strategy?, McKinsey Core competence Activity: Peer Review Résumé (bring your résumé to class) Lecture: Porter's 5-forces Case 1: Jay Zee at DeGroote Case 2: Cola Wars
3	Mon. Jan. 23 to Fri. Jan. 27	Read: SAA Chapters 3 and 4 Optional Read: HBR Why good companies go bad, Strategy as stretch Case 3: Canadian Airlines Read: Capstone Simulation (CAPSIM) Team Member Guide Activity: CAPSIM teams must be formed, and TA notified, register on-line
4	Mon. Jan. 30 to Fri. Feb. 3	Attend McMaster World Congress Theme: Smart Technology Thursday February 2 – Friday February 3, 2023 CIBC Hall, 3 rd floor, McMaster University Student Centre Register for at least 3 sessions at: https://worldcongress.mcmaster.ca

5	Mon. Feb. 6 to Fri. Feb. 10	Read: SAA Chapters 5 and 6 Case 4: Designer Classics CAPSIM Practice Round Starts: Mon. Feb. 6 @ 9:00am
6	Mon. Feb. 13 to Fri. Feb. 17	Read: SAA Chapters 7 and 8 Case 5: Harlequin Enterprises Class Activity: PEEST and 5 Forces analysis CAPSIM Practice Round #1 Decisions Due: Wed. Feb. 15 @ 3:00am CAPSIM Practice Round #2 Decisions Due: Fri. Feb. 17 @ 3:00am CAPSIM Restart Simulation: Sat. Feb. 18 @ 12:00pm MWC Assignment Due: Fri. Feb. 17 @ 6:00pm
7	Mon. Feb. 20 to Fri. Feb. 24	No Classes (mid-term recess)
8	Mon. Feb. 27 To Fri. Mar. 3	Read: SAA Chapters 9, 10 and 11 Optional Read: BQ There's a price on your head Case 6: Rehabilitation Research Centre (download from AVENUE) Lecture: Special Topic (optional) CAPSIM Year 1 Decisions Due: Wed. Mar. 1 @ 3:00 am CAPSIM Year 2 Decisions Due: Fri. Mar. 3 @ 3:00 am CAPSIM Business Plan Due: AVENUE (Fri. Mar. 3 @ 6:00 pm) CAPSIM Initial Situational Analysis Due: AVENUE (Fri. Mar. 3 @ 6:00pm)
9	Mon. Mar. 6 to Fri. Mar. 10	Case 7: Hyperion Aurora Trust Hyperion Assignment Due: AVENUE (Fri. Mar.10 @ 6:00 pm) Optional Read: HBR Why be honest if honesty doesn't pay Case 8: Fifth Column (download from AVENUE) CAPSIM Year 3 Decisions Due: Wed. Mar. 8 @ 3:00am CAPSIM Year 4 Decisions Due: Fri. Mar. 10 @ 3:00am
10	Mon. Mar. 13 to Fri. Mar. 17	Case 9: Weytjen's First Assignment Optional Read: CDI Managing & improvising, HBR When is virtual virtuous? CAPSIM Year 5 Decisions Due: Wed. Mar. 15 @ 3:00am CAPSIM Year 6 Decisions Due: Fri. Mar. 17 @ 3:00am
11	Mon. Mar. 20 to Fri. Mar. 24	Major Field Test in Business (in class on campus) CAPSIM Year 7 Decisions Due: Wed. Mar. 22 @ 3:00am CAPSIM Year 8 Decisions Due: Fri. Mar. 24 @ 3:00am
12	Mon. Mar. 27 to Fri. Mar. 31	Case Exam: Download from AVENUE on Mon. Mar. 27 @ 9:00am Case Exam: Due on AVENUE on Fri. Mar. 31 @ 6:00pm
13	Mon. Apr. 3 to Thu. Apr. 6	Comp-XM Start: Mon. Apr. 3 @ 9:00am Comp-XM Complete Years 1-4 and Board Queries by Thu. Apr. 6 @ 6:00pm CAPSIM Peer Evaluations Start: Mon. Apr. 3 @ 9:00am CAPSIM Peer Evaluations Due: Thu. Apr. 6 @ 6:00pm

Commerce 4PA3

Case Questions/Guidance for Participation (25 marks)

Case 1: Jay Zee at DeGroot [Marks = 1]

1. Assignment: Your resume must be uploaded on AVENUE Porto receive 1 mark
2. What was Jay Zee's fatal flaw? Is there any other action Jay Zee should take?
3. Could Jay Zee have taken pre-emptive action to undercut any objections to his candidacy (i.e., by co-opting the authority of Mr. Fraser?)
4. For tool #M18: Management Preferences, in whose interest is Mr. Fraser acting, and in whose interest should Jay Zee be acting?

Case 2: Cola Wars [Marks = 2]

1. Conduct a Porter's 5 Forces analysis on the industry.
2. Why, historically, has the soft drink industry been so profitable?
3. Compare the economics of the concentrate business to that of the bottling business: Why is the profitability so different?
4. How has the competition between Coke and Pepsi affected the industry's profits?
5. How can Coke and Pepsi sustain their profits in the wake of flattening demand and the growing popularity of non-CSDs?
6. What substitute products have been embraced by the Cola giants in order to diversify their corporate risk in case colas fall out of favour? (Hint: Consider Tool #E10: Porter's 5 Forces.)
7. A majority of respondents favour Coca Cola pre-taste test, yet the Pepsi Challenge yields significantly different results post-taste test. Discuss citing Tool #S7: Product/Market Matrix.

Case 3: Canadian Airlines [Marks = 3]

1. What is the difference between a regulated and deregulated industry?
2. What are the implications of deregulation for companies, the government and customers?
3. What is your assessment of CA's strategic initiatives during the various phases of its history?
4. In retrospect, should CA have done something different?
5. How does this industry make money? (i.e., explain using Appendix B)
6. Conduct a Porter's 5 Forces analysis on the industry.
7. How do airlines differentiate in order to compete?
8. What is unusual about a particular entry in Exhibit 3? Why does it make sense to have a non-numeric entry?
9. Describe the nature of the rivalry between CA and AC (use Exhibits 3 and 4)
10. As you evaluate Plan A and Plan B, consider whether enacting one of them would flow into enacting the other one. Tool #S4 Performance Matrix – longitudinal perspective
11. Choose and defend either Plan A or B

Case 4: Designer Classics [Marks = 4]

1. Assess the company's strategic components (use Figure 2.1 in SAA text)
2. Succinctly explain the company's core competence and value proposition
3. What are the pros and cons of the following strategic initiatives (Tool #22: Decision Matrix)?
 - a. WSM acquisition
 - b. Elite Carpets acquisition
 - c. Ownership Exchange with Distributor
 - d. Importing Company
4. Draw the value chain starting with "Fleece" and ending with the "Customer"
5. Jim Dunlop has a disdain for unions to the point of not being willing to give employees a raise in the face of low regional unemployment (Tool #S2: Organization Performance) and significant employee turnover (Tool #S3: Organizational Health). Assume the consequent effect of a 10 cent/hour raise countered by a scenario of lower turnover, decreased administration, and training costs for new employees (assume employees need three months to be fully trained). Is Jim's attitude actually hurting Designer Classics because the cost of not giving them a raise could be more than the cost of the raise? What would you advise Jim Dunlop to do? Consider Tool #22: Decision Matrix.
6. Which deal(s) should Jim Dunlop make? Make a decision matrix with criteria.

Case 5: Harlequin Enterprises [Marks = 4]

1. Complete the 2X2 performance / health matrix.
2. What product is Harlequin offering?
3. What are the key success factors in the industry?
4. Conduct an Environment and Resource analysis.
5. Is it possible that the alternatives developed in Tool #22: Decision Matrix could all be supported simultaneously by #R16: Resource Analysis because Harlequin is financially quite healthy (Tool #S2: Organization Performance)? Furthermore, are the alternatives being evaluated symbiotically? Might you suggest they all be implemented?
6. Develop and evaluate alternatives and make a recommendation for action.

Case 6: Rehabilitation Research Centre [Marks = 3]

1. Evaluate the 2X2 performance - health matrix.
2. What is the potential liability to Korpela and RRC if he were to unilaterally leave RRC after six months of his one-year contract? Tool #E12 identify and compare Stakeholder Interests.
3. Why would RRC invest \$400,000 into a trust fund? (Hint: Consider Tool #S2: Organizational Performance.)
4. What is the Net Liquidation Value?
5. Evaluate Korpela's Diamond-E report.
6. What are the pros and cons of each alternative?
7. What should Korpela do personally?

Case 7: Hyperion Aurora Trust [Marks = 4]

1. What factors are driving the changes in the mutual fund industry?
2. What is the industry structure?
3. Explain the pricing of mutual funds (use Exhibit 1A)
4. What are some possible future developments in the industry?
5. How is CIBC SI trying to position itself?
6. Who are the stakeholders Athena Collins must please?
7. **Every student must complete the spreadsheet analysis and upload it to Avenue to receive 1 mark**

Assume a typical investor purchases \$10,000 worth of Aurora using the back-end load option which includes a performance bonus; what are the cash flow impacts for CIBC SI, the broker, and van Berkom? (i.e., assume the fund grows at 10 per cent each of the first two years and the TSX grows at 7 per cent the first year and 15 per cent the second)

8. If van Berkom hits his bonus targets, should he be assessed and paid monthly, quarterly, or annually? Tool #M18 Management Preferences (in whose interest is van Berkom acting?)

Case 8: Fifth Column [Marks = 1]

1. Download the case from AVENUE
2. What is the ethical dilemma in this case?
3. What is the meaning of “Fifth Column”, and why is the title applicable to this case? i.e., who is in a position to harm the company? Tool #E12 Stakeholder Interest.
4. What are Olivia Jones' options?
5. What would you do if you were Olivia Jones?

Case 9: Weytjen’s First Assignment [Marks = 3]

1. This case has multiple follow-up readings that are available from AVENUE:
 - a. Strike
 - b. A delegation of chefs
 - c. A plan of action
2. What is the decision context that Erik faces?
3. What personal, business and environmental factors influence Erik’s actions?
4. What is your assessment of the situation at Sabena catering?
5. How ready is the organization for change?
6. What specific actions should Erik take to resolve the problems?
7. Specify tools and elements of the Diamond-E in your analysis.