

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

**Strategic Management Area
DeGroote 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 DeGroote 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. Nick Bontis
Course Coordinator
nbontis@mcmaster.ca
Office: DSB #207 x23918
C09: Mon 11:30 – 14:20

Dr. Paul Snowdon
Faculty Instructor
snowdonp@mcmaster.ca
Office: DSB #209 x23968
C05: Fri 8:30 – 11:20
C06: Thu 14:30 – 17:20
C07: Fri 14:30 – 17:20
C08: Thu 11:30 – 14:20

Professor Rita Cossa
Faculty Instructor
cossar@mcmaster.ca
Office: DSB #206 x26197
C01: Mon 8:30 – 11:20
C02: Tue 19:00 – 22:00
C03: Tue 14:30 – 17:20
C04: Wed 8:30 – 11:20
C10: Mon 14:30 – 17:20

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 enterprise** 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:

- Demonstrate the ability to adhere to course timelines and manage individual and group tasks efficiently and effectively to meet project requirements
- Meet all deadlines and complete all course components as instructed (NOTE: there are no extensions, late submissions will NOT be accepted and receive a zero grade)
- Learn to anticipate potential roadblocks and develop contingency plans to ensure timely completion of all strategic tasks and projects
- Develop resilience and adaptability skills in the face of changing timelines or unexpected delays, understanding how to recalibrate strategies and team alignment accordingly
- Treat classroom sessions as business meetings by coming fully prepared to discuss and debate the issues of the day. This entails completing all necessary readings and course components on-time and arriving to class fully prepared to actively participate in case discussions each week while empirically defending your analysis, choices and actions
- Cultivate a habit of critical thinking, self-reflection, and continuous learning in the field of strategic management to adapt to rapidly changing business environments
- Develop the ability to effectively communicate (orally and in written form) strategic analysis and recommendations to diverse stakeholder groups
- Understand the role and importance of strategic leadership in shaping organizational direction and use appropriate tools to make informed strategic decisions
- Play the role of the main decision-maker(s) and conduct whatever strategic analysis is necessary (e.g., Diamond-E drill) while taking all stakeholders into account
- Assess the operational health and business performance of the organization while forecasting its prospects to achieve competitive advantage
- Understand the impact of global and local trends on strategic decision-making in an organizational context while considering national-, industry-, and firm-level implications

- Calculate, analyze and provide implications for industry metrics, marketing data, accounting ratios, financial statements and projections to defend recommendations
- Understand the role of innovation and entrepreneurship and how they contribute to scenario planning and first versus second mover advantage
- Define the capabilities essential for the successful growth of a business and formulate a strategic plan while considering the organization’s capabilities and environmental context
- Evaluate the risks associated with strategic choices and develop plans and contingencies to mitigate such risks
- Critically evaluate the effectiveness and suitability of different strategies in varied industry, regulatory, and competitive contexts
- 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	\$ 87 CAD
• e-book 6 month-rental online at the Campus Store	\$ 49 CAD
Custom Courseware: Commerce 4PA3 Business Policy / Strategy	
• e-book 6 month-rental online at the Campus Store online	\$ 31 CAD
Capstone Business Simulation (CAPSIM)	
• Team Member Guide download from website (http://www.CapSim.com)	\$ FREE
• CAPSIM Simulation Registration (per student) use credit card	\$ 54 USD
• COMP-XM Registration (per student) use credit card	\$ 15 USD

NOTE: there are no hard copy (paper) versions of the textbook or custom courseware available for sale or produced by the publishers

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 in the simulation. There are no extra assignments provided for supplemental grade support.

Assignment	Résumé (individual)	0%
	Porter's 5 Forces (individual)	5%
Capstone Simulation (CAPSIM)	Introductory Lesson Quiz (individual)	0%
	Initial Situational Analysis (shared)	0%
	Business Plan (shared)	0%
	Capstone Simulation Decisions (shared)	20%
	COMP-XM Simulation Decisions (individual)	5%
	Peer Evaluation (individual)	5%
Exam	Multiple Choice Test – in class (individual)	10%
	Case Solution – take home (individual)	30%
Participation	Synchronous weekly 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
Assignments	Synchronous	Avenue
Capstone Simulation	Due: 3am Wed. and Fri.	www.CapSim.com
Multiple Choice Test	Synchronous	in classroom
Case Exam	Asynchronous	Avenue

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
			F	(0)	00 - 49

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 – PORTER’S 5 FORCES ANALYSIS

This assignment must be completed individually. You are required to submit a 5 Forces analysis of a particular industry which will be announced in class. This includes all aspects of Porter’s model. It is important to incorporate facts and figures from the industry document. However, you do NOT need to cite your work. You will be graded on your ability to write a concise, accurate, and in-depth analysis with corresponding implications. You must also specify whether or not each force is a high, medium or low threat in this industry. Read “How competitive forces shape strategy” in the *Harvard Business Review* for background information which you will find on AVENUE.

- The total report is limited to **1 page** of text;
- Your full name, student #, section #, must be at the top right corner of the page;
- 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**
- Late assignments will **NOT** be accepted and receive a **zero grade**

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. 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: customer, internal business, innovation & learning, and financial. 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.

Generally speaking, marks for the simulation range from 20 out of 20 for the top-performing team across sections to 12 out of 20 for the worst-performing team across all sections.

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.

- 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 CAPSIM 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 CAPSIM 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.

MULTIPLE CHOICE TEST

There is one multiple choice examination in this course that must be completed individually while in class. The exam will cover material from the textbook, readings, lectures and class discussion. The multiple-choice exam will **NOT** cover case content material and will **NOT** cover optional readings.

No electronic devices (e.g., calculators, tablets, laptops, smartphones) or printed materials are permitted. It's a closed-book exam and should take approximately 60 minutes to complete. However, students are permitted to use the whole 3-hour period of class time if they wish.

FINAL CASE EXAM – SOLUTION SUBMISSION

There is one take home cumulative final 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 (0)** as there are no extensions. The case exam is considered the final comprehensive evaluation component of this course. As such, an adequate level of 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. In the case of a documented and approved medical emergency, students will write the case exam during the next academic term.

PARTICIPATION

Attendance is mandatory for each class. Students are expected to arrive on time and be prepared. 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

(e.g., “I agree”) 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. General speaking, student participation in each class will be assessed according to the following scale:

Level 0	Attended class but didn't talk or contribute to the open class or case discussion
Bronze	Conducted analysis of the case and contributed several times with little context
Silver	Participated multiple times throughout the class with several quality contributions
Gold	Made several memorable and case-cracking contributions with empirical backing and provided detailed implications and context

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.

ELECTRONIC DEVICES POLICY

IMPORTANT: NO one is permitted to record (audio and/or video) or photograph any portion of the class, classmates, the instructor, guest speakers, or TA.

Electronic devices such as tablets, laptops and smartphones are welcome and even encouraged in class so that we can better work together on learning activities and readings. The instructors and TAs in this course work hard to create a lively intellectual experience and so these devices may be used during class discussions (e.g., to research current events, and/or take notes during instructor-led lectures).

However, there will be NO electronic devices permitted during case discussions. All devices must be turned off and stowed away during case participation. Please remember that the case discussion portion of each class is an important evaluative component for this course. If there is a serious need to leave your cell phone on, such as a family emergency, please put it on vibrate and let the instructor and TA know at the beginning of the class. Otherwise, all electronic devices are expected to be removed from your immediate workspace.

There is a zero-tolerance policy for recording or any unauthorized use of electronic devices during case discussion. A first offense will result in a warning and a reduction of participation marks for the class. Any subsequent offenses will result in the student being asked to leave the classroom.

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. The following illustrates three forms of dishonesty:

1. Plagiarism, e.g., submission of work that is not one’s own
2. Improper collaboration in group work
3. Copying or using unauthorized aids in tests and examinations

Please refer to the Academic Integrity Policy:

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

Students are not permitted to use generative AI (artificial intelligence) in this course. This includes work created by generative AI tools. Also stated in the policy is the following, “Contract Cheating is the act of “outsourcing of student work to third parties” with or without payment.” Using generative AI tools is a form of contract cheating.

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. 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. Students should be aware that when they access electronic components of the 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.

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 final case exam by the deadline or receive a **zero (0) mark** on the submission. There will be **no make-up case exam**.

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 OF STUDENTS WITH DISABILITIES

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 policy:

<https://sas.mcmaster.ca/>

<https://secretariat.mcmaster.ca/app/uploads/Academic-Accommodations-Policy.pdf>

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://secretariat.mcmaster.ca/app/uploads/Code-of-Student-Rights-and-Responsibilities.pdf>

RELIGIOUS, INDIGENOUS, OR SPIRITUAL OBSERVANCES (RISO)

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. Students should also contact their instructors as soon as possible to make alternative arrangements for classes, assignments, and tests.

<https://secretariat.mcmaster.ca/app/uploads/2019/02/Academic-Accommodation-for-Religious-Indigenous-and-Spiritual-Observances-Policy-on.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.

DEADLINE POLICY

All deadlines are strict so mark your calendars. Missing a deadline will result in a **zero (0) mark** on that submission for that component. There are **NO extensions** and **NO make-up** for the assignments, simulation, or final case exam. There will be **NO MSAF** accepted for the final case exam. Problems with technology are not an acceptable excuse for late submission of your assignments. You **MUST** assume that technology will fail you at some point. You cannot and should not assume that everything will go smoothly when it comes to the internet, AVENUE, your WiFi connection, calculator, printer, or your computer. It is incumbent upon you to plan ahead and not leave your projects for the last possible moment. It is recommended that you aim to submit all projects well in advance of the deadline.

ACKNOWLEDGEMENT OF COURSE POLICIES

Your enrolment in Commerce 4PA3 will be considered to be an implicit acknowledgement of the course policies outlined above, or of any other that may be announced during lecture and/or on A2L.

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 Fall 2023 Course Schedule

Section	Date	Start	End	Instructor
C01	Monday	08.30	11.20	Rita Cossa
C02	Tuesday	19.00	22.00	Rita Cossa
C03	Tuesday	14.30	17.20	Rita Cossa
C04	Wednesday	08.30	11.20	Rita Cossa
C05	Friday	08.30	11.20	Paul Snowdon
C06	Thursday	14.30	17.20	Paul Snowdon
C07	Friday	14.30	17.20	Paul Snowdon
C08	Thursday	11.30	14.20	Paul Snowdon
C09	Monday	11.30	14.20	Nick Bontis
C10	Monday	14.30	17.20	Rita Cossa

WEEK	DATE	ASSIGNMENT
1	Mon. Sep. 11 to Fri. Sep. 15	Discuss: course outline, schedule, participation, grading, AVENUE Discuss: Selecting team members for CAPSIM simulation Lecture: Introduction to Strategy and Strategic Process Guest Speaker: CPD to discuss résumé, cover letter, and job interviews VIDEOS: Improving Case Participation (Parts 1 and 2) on AVENUE
2	Mon. Sep. 18 to Fri. Sep. 22	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 (soft copy on Avenue, hard copy bring to class) Lecture: Porter's 5-forces Case 1: Jay Zee at DeGroote Case 2: Cola Wars
3	Mon. Sep. 25 to Fri. Sep. 29	Read: SAA Chapters 3 and 4 Optional Read: HBR Why good companies go bad, Strategy as stretch Case 3: Canadian Airlines Read: Capstone Simulation (www.CAPSIM.com) Team Member Guide Activity: CAPSIM teams must be formed, and TA notified, register on-line
4	Mon. Oct. 2 to Fri. Oct. 6	Read: SAA Chapters 5 and 6 Case 4: Designer Classics Assignment Porter's Due: AVENUE (Fri. Oct. 6 @ 4:00pm)
5	Mon. Oct. 9 to Fri. Oct. 13	No Classes (mid-term recess)

6	Mon. Oct. 16 to Fri. Oct. 20	<p>Read: SAA Chapters 7 and 8 Case 5: Harlequin Enterprises Class Activity: PEEST and 5 Forces analysis CAPSIM Practice Round #1 Decisions Due: Wed. Oct. 18 @ 3:00am CAPSIM Practice Round #2 Decisions Due: Fri. Oct. 20 @ 3:00am CAPSIM Restart Simulation: Sat. Oct. 21 @ 12:00pm</p>
7	Mon. Oct. 23 To Fri. Oct. 27	<p>Read: SAA Chapters 9, 10 and 11 Optional Read: BQ There's a price on your head Case 6: Rehabilitation Research Centre Lecture: Special Topic (optional) CAPSIM Year 1 Decisions Due: Wed. Oct. 25 @ 3:00 am CAPSIM Year 2 Decisions Due: Fri. Oct. 27 @ 3:00 am CAPSIM Introductory Lesson Quiz Due: Fri. Oct. 27 @ 4:00pm CAPSIM Business Plan Due: AVENUE (Fri. Oct. 27 @ 4:00 pm) CAPSIM Initial Situational Analysis Due: AVENUE (Fri. Oct. 27 @ 4:00pm)</p>
8	Mon. Oct. 30 to Fri. Nov. 3	<p>Case 7: Hyperion Aurora Trust Hyperion Assignment Due (soft copy in Avenue, hard copy bring to class) Optional Read: HBR Why be honest if honesty doesn't pay Case 8: Fifth Column CAPSIM Year 3 Decisions Due: Wed. Nov. 1 @ 3:00am CAPSIM Year 4 Decisions Due: Fri. Nov. 3 @ 3:00am</p>
9	Mon. Nov. 6 to Fri. Nov. 10	<p>Case 9: Weytjen's First Assignment Optional Read: CDI Managing & improvising, HBR When is virtual virtuous? CAPSIM Year 5 Decisions Due: Wed. Nov. 8 @ 3:00am CAPSIM Year 6 Decisions Due: Fri. Nov. 10 @ 3:00am</p>
10	Mon. Nov. 13 to Fri. Nov. 17	<p>Multiple Choice Test (in-class) CAPSIM Year 7 Decisions Due: Wed. Nov. 15 @ 3:00am CAPSIM Year 8 Decisions Due: Fri. Nov. 17 @ 3:00am</p>
11	Mon. Nov. 20 to Fri. Nov. 24	<p>Case Exam: Download from AVENUE on Mon. Nov. 20 @ 9:00am Case Exam: Due on AVENUE on Fri. Nov. 24 @ 4:00pm</p>
12	Mon. Nov. 27 to Fri. Dec. 1	<p>Comp-XM Start: Mon. Nov. 27 @ 9:00am CAPSIM Peer Evaluations Start: Mon. Nov. 27 @ 9:00am Comp-XM Complete Years 1-4 and Board Queries by Fri. Dec. 1 @ 4:00pm CAPSIM Peer Evaluations Due: Fri. Dec. 1 @ 4:00pm</p>

Commerce 4PA3

Case Questions/Guidance for Participation (25 marks)

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

1. Assignment: Your resume must be uploaded soft copy on AVENUE + hard copy bring to class
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. What industry are we in?
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.