

**IBH 3BB3 Strategy for Organizations
Fall 2023 Course Outline**

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

COURSE OBJECTIVE

This course is designed to unify the functional knowledge you have gained thus far in the program. This course will also give you a working knowledge of how for-profit, social enterprises and non-profit organizations *create* (and *capture*) value to gain and sustain competitive advantage. This course will enhance your capacity to do the job of a general manager responsible for setting strategy and managing performance.

INSTRUCTOR AND CONTACT INFORMATION

Dr. Brent McKnight

Instructor

bmcknight@mcmaster.ca

Office: DSB 210

Office Hours: After or before class
and by appointment. At times I will
schedule office hours close to
important deliverables.

Chloe Blondin

TA

blondinc@mcmaster.ca

COURSE ELEMENTS

Credit Value:	3	Leadership:	Yes	IT skills:	No	Global view:	Yes
A2L:	Yes	Ethics:	Yes	Numeracy:	Yes	Written skills:	Yes
Participation:	Yes	Innovation:	Yes	Group work:	Yes	Oral skills:	Yes
Evidence-based:	Yes	Experiential:	Yes	Final Exam:	No	Guests:	Yes

COURSE DESCRIPTION

In this course, students will explore frameworks that help them conduct strategic analysis as well as formulate and implement new strategies to improve organizational performance. The course is structured to provide strategic management tools and frameworks to assist organizations of all types, from public and private for-profit firms through social businesses and social enterprises to non-profit and charitable organizations. Through case-based discussion, guest speakers, and experiential exercises, students will be pushed to answer key questions such as: How do organizations across the for-profit and non-profit continuum define their purpose, and conceptualize, create, and capture value? How do these organizations analyze strategic opportunities and structure effective investments? What is the nature of competitive advantage in for-profit and non-profit contexts and how is it gained and sustained?

The course serves as an opportunity to develop skills for strategic thinking and analysis, leadership, communication, teamwork, and cross-functional integration. What you will learn in this course has utility beyond the senior leadership of organizations. Increasingly, organizations need employees that can think strategically and understand how their actions contribute to the overall success of the organization as well as the impact that organizations have in the broader society.

LEARNING OUTCOMES

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

- Assess an organization's performance.
- Analyze how an organization's strategy sustains competitive advantage identifying both strengths and weaknesses.
- Conduct rigorous internal and external environment analysis using strategic management frameworks.
- Understand how strategic management is similar and different across for-profit, social enterprise and non-profit contexts.
- Formulate new business-level strategies under a range of different contexts.

COURSE MATERIALS AND READINGS

Required Materials

Material Description	Cost
Courseware – WDI Publishing https://wdi-publishing.com/coursepack/purchase/?cpack=CQS18	\$15.80 USD
Courseware Ivey Publishing https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c0000EjQiiEAF	\$26.55
Course content and readings http://avenue.mcmaster.ca	Free
Open-source Textbook <u>Mastering Strategic Management</u> (<i>open source</i>) by Ketchen and Shook https://opentextbc.ca/strategicmanagement/	Free
Top Hat Membership	Free

Course Website:

This course has an e-learn website at McMaster Avenue2Learn at <http://avenue.mcmaster.ca>.

On this site you will find:

- Lecture slides in pdf
- Links to useful strategic management content
- Additional information about course evaluation components
- Course documents such as this syllabus, any amendments to the schedule
- Articles of interest

The Avenue site is an important communication platform for this course. You should develop the habit of checking the course page regularly. It is your responsibility to ensure that your e-mail address and account settings in Avenue are correct for you to receive messages.

TopHat membership

We will be using the Top Hat (www.tophat.com) classroom response system in class. You will be able to follow the class discussion and submit answers to in-class questions using smartphones, tablets, or laptops.

You can visit the Top Hat Overview (<https://success.tophat.com/s/article/Student-Top-Hat-and-Getting-Started-Guide>) within the Top Hat Success Center which outlines how you will Top Hat account, as well as provides a brief overview to get you up and running on the syst

An email invitation will be sent to you, but if you don't receive this email, you can register by simply visiting our course website: <https://app.tophat.com/e/831922>

Should you require assistance with Top Hat at any time, please contact their Support Team directly by way of email (support@tophat.com), the in-app support button, or by calling 1-888-663-549

COURSE OVERVIEW AND ASSESSMENT

ACTIVITY	DELIVERY	DESCRIPTION	TOOL(S)
Readings	Asynch	Tied to weekly discussion prompts and lecture content	Readings linked in Avenue, from coursepack, and in assigned textbook
Group Discussions	Both	Synch: Breakouts during class to discuss case questions Asynch: Students leverage Teams or other Social Media apps to complete group assignments	In Person
Live Lectures / Case Discussion	Synch	3-hour live session: Opportunity to elaborate on core content, facilitate case discussion, and engage in discussions	In Person
Live Guest Speakers / Q&A	Synch	30 – 45 min virtual and in-person guest speakers/ panelists to enrich student learning. Allows for interactive Q&A	In Person
Live games / quizzes	Synch	Games and quizzes to reinforce core content learning and drive student engagement	TopHat

Evaluative Component

GRADE COMPONENT	WEIGHT	DESCRIPTION
Engagement (individual)	20%	10%: In-Class Quizzes and Reflection (Synch, TopHat) 10%: Participation (Synch, In-Person and Zoom)
Midterm (individual and shared)	20%	15%: individual MC test (Synch) 5%: group MC test (Synch)
Final Case Exam (individual and shared)	40%	10%: Live Case Analysis (shared) (A2L) 20%: Live Case Exam (individual) (A2L) 10%: Presentation to Executives (shared) (Synch, In-Person and Zoom)
Building a Theory of Change (shared)	20%	5%: Draft Theory of Change Presentation (A2L) 15% Final Theory of Change Presentation (Synch, In-Person and Zoom)

COURSE DELIVERABLES

Classroom Engagement (20% individual)

In-Class Quizzes and Reflection (10%). Each class in this course focuses on a topic important for properly understanding strategic management. To guide your learning, during class you will answer questions pertaining to a) the prepared case, b) short answer and multiple-choice on concept comprehension, and c) short reflections on key strategic concepts. The Top Hat platform will be used to facilitate this.

Participation (10%). The daily classroom discussion represents a unique opportunity for you to develop and enhance your confidence and skill in articulating a personal position, reacting to new ideas, and receiving and providing critical feedback from a group of assertive and demanding colleagues. Much of your learning will come from these classroom experiences.

You are expected to come to each class having read cases and assigned readings. Most of all, you are expected to come to class with a readiness and willingness to contribute to class discussion. Close to half of each class will be focused on case discussions. It is not possible to

contribute without having sufficiently prepared for the case. Analyzing the case using the tools and frameworks from the textbook and past classes will give you valuable insights.

A good contribution involves presenting a clear opinion, expressing it civilly, and supporting the opinion with sound logic. Every student shares the responsibility to create an environment where each member of the class feels comfortable offering his or her opinion. Learning from others and contributing to the learning of others through the experience and insights you share is a key part of this learning process. Contribution will be graded based on quality, quantity, and consistency. Some of the things that will determine a contribution include:

- a) Relevance – Do your comments speak directly to the issues and concepts being addressed? Do they extend our understanding of those issues or concepts? Do they reflect your adequate preparation to participate in the discussion?
- b) Additivity – Do your comments reflect active listening to the comments of other class members? Have they incorporated insights introduced earlier and built upon them?
- c) Substance – Do your comments make a real contribution to the ideas being exchanged? Has anything new been gained from your contribution to the discussion?
- d) Persuasiveness – Have your points been well articulated, argued, and supported? Are your arguments convincing?
- e) Questioning – Have your comments reasonably questioned the comments of others or challenged their assumptions without disparaging the person who offered them?
- f) Amount of participation (this does NOT mean dominating the discussion, rather frequency of additive comments).

Multiple Choice Midterm (15% individual and 5% shared)

This is an in-class multiple choice exam. The exam will cover material from the **first 5 classes** (Strategic management content, not case facts or details). This midterm has been created using pedagogical innovations shown to improve learning outcomes.

Generating Multiple Choice Questions. Students are called upon to create the multiple-choice questions that will constitute the exam. By the **Sunday (11:59pm)** following each of the **first 5 classes**, students will submit one (1) multiple-choice question based on content from the required readings and/or classroom learning (no case facts please). The purpose of doing this is to encourage you to actively identify important course content.

Each question should be accompanied by 4 potential answers (a through d) with the correct answer clearly identified. Questions must be submitted using the **excel spreadsheet template** found on Avenue. Subsequent submissions should build on this spreadsheet such that the final submission of an Excel spreadsheet has **5 questions**. Submissions will be due on Avenue. All finalized questions must be submitted by **Sunday October 22nd at 11:59pm**.

Strong questions and answers should:

- Be clearly worded and not misleading.
- There must be one, and only one, correct answer.
- Demonstrate understanding of strategic management concepts taught in class.
- Present a range of difficulty—questions should not have an obvious answer.
- Reflect either learning from readings or learning from classroom discussion.
- Questions should not be specific to teaching cases from class. For example, do not ask a question about what strategy Amazon adopted.

There is a presentation on Avenue under Course Administration with some tips on writing strong multiple-choice questions.

The strongest ~60 questions will be selected for inclusion on the multiple-choice test (see above). It is therefore in your best interest to produce high quality questions, because these will be only minimally altered before examination (corrected as necessary). The professor reserves the right to add questions beyond those submitted by students if necessary.

As a strong incentive, if at least one of your questions is used to create the midterm, you will receive **one bonus mark/percent** on your final course grade. This is a valuable incentive as it can be the difference between a B+ and an A- (for example)!

Group Exam Writing. You will first write the multiple-choice exam individually. Once completed individually, students will get into their course groups to complete the same test. Writing tests in groups has been showing to improve learning outcomes. The course groups will be the same for the midterm, live case exam, and theory of change assignment. The individual submission will account for 15% of the final grade while the group submission will account for an additional 5%. Students who score individually better than their group will receive their individual test score weighted for the full 20%.

NOTE: The use of a McMaster standard calculator is allowed during examinations in this course but not necessary.

Live Final Case Exam (20% individual case exam) and (20% shared analysis and presentation)

Your final exam is a live case that starts right after the Fall break. A real executives will make a presentation in your class detailing their organization, industry, and their strategic problem(s). You will receive an approximately 5-page case detailing the organization along with documents as appropriate. In addition, you will continue to engage the client, asking questions and clarifying the problem throughout the duration of the course.

You may be asked to sign a non-disclosure agreement (NDA) in support of this project.

Please acknowledge intellectual debts and facts and figures in your case using a superscript number and endnotes to reports. Draw on the library citation guide

(<https://library.mcmaster.ca/sites/default/files/businesscitation.pdf>) paying particular attention to page 6 and page 15 for endnote and citation support.

The case exam takes place in three parts; two of which you will work in your groups to accomplish.

PART 1: Live Case - Analysis (**Shared 10%**)

In the first phase, students will work in their course groups to conduct analysis of both the resources and capabilities within the organization as well as the organization's external environment. Students will use knowledge gained in the course to apply strategic analysis frameworks to this analysis. This case *analysis* will be graded both on thoroughness and detail as well as how the analysis highlights "so what" implications from the internal and external analysis.

Note: While a SWOT analysis can be a useful brainstorming exercise, the strategy tools taught in the class are better ways of organizing this information. Strengths and weaknesses are best organized through VRIO analysis, value chain, and strategic understanding through generic strategy identification and strategy diamond resource analysis whereas opportunities and threats are best organized through PEST, Porter's, Strategic Groups. Seek to show a holistic understanding of how these tools inter-relate.

Analysis portion of report **8-10 pages**, 12-point Times New Roman, 1.5 spacing, 1-inch margins. The report must be completed in essay format with enclosed exhibits. Endnotes can take additional pages as necessary.

Student groups will submit their solutions through dropbox in Avenue. Submissions will be subject to the turnitin.com service and will be reviewed in accordance with the university's academic integrity policy. Please be careful to read the case exam instructions carefully.

Live Case analysis will be due **Sunday November 5th at 11:59pm** to dropbox. Exams that are handed in late will be penalized at a rate of 25% per day starting at 11:59pm on the Wednesday following the due date.

PART 2: Live Case Exam (**Individual 20%**)

Students will submit solutions to the live case exam. These solutions constitute the recommendations you as a consultant are making to the client. This case exam will be graded on how well the proposed solution demonstrates an understanding of the client's situation, an assessment of strengths and weaknesses including internal and external strategic fit, as well as how proposed solutions are argued to improve strategic fit and performance. ***Each case solution must be completed individually.***

Live Case Exam portion **maximum of 7 pages**, 12-point Times New Roman, 1.5 spacing, 1-inch margins. The report must be completed in essay format with enclosed exhibits. Endnotes can

take additional pages as necessary. Please include as an appendix your group's Case analysis. Cite your group report like an existing published work such as: "Group 5 Live Case Report, IBH 3BB3 course submission, November 2023."

Students will submit their solutions through dropbox in Avenue. Submissions will be subject to the turnitin.com service and will be reviewed in accordance with the university's academic integrity policy. Please be careful to read the case exam instructions carefully.

Your final solution to the case will be due to **Sunday November 26th at 11:59pm**. Exams that are handed in late will be penalized at a rate of 25% per day starting 11:59pm on the Tuesday following the due date. Remember, these individual assignments need to be submitted before you can work in groups towards a final presentation!!

The case exam is considered the final comprehensive evaluation component of this course. As such, performance on this exam is critical for successful completion of this course.

PART 3: Presentation to Executives (Shared 10%)

Following submission of the individual portion of the case exam, students will work in their course groups. They will share and then discuss their individual case exam solutions to arrive at a final recommendation and solution for the client executives. Historically, the strongest presentations are those that have carefully considered the assumptions and insights behind each group member's individual solutions, and crafted a comprehensive solution in these groups, students will then prepare a **9-minute** presentation with supporting documentation for delivery as a final exam. Groups will have **3 additional minutes** to answer questions. This presentation will take place on the final day of class during normal class time.

Please submit presentations files and any other material through Avenue prior to the start of class on the day of presentation. ***Students will get a 0% for late or absent presentation files.***

Theory of Change Assignment (Shared 20%)

In this group assignment, you will work with a local agency provided through the United Way of Halton and Hamilton to identify their challenges and craft a Theory of Change that identifies the Activities and Change Mechanisms that will lead to their desired Impacts and Outcomes for an Agency program.

Students will find the following resources useful for completing this assignment:

- Delivering on the Promise of Non-Profits - <https://hbr.org/2008/12/delivering-on-the-promise-of-nonprofits>
- Engines of Impact, Chapter 8: Scaling - In your courseware
- Theory of Change – Davide Hearle <https://www.youtube.com/watch?v=lkpLmeVc5ck> (3:23)

- Measuring your social impact: Theory of Change
<https://www.youtube.com/watch?v=dpb4AGT684U> (2:25)
- <https://www.thinknpc.org/resource-hub/ten-steps/> (resource for theory of change assignment)

For detailed Theory of Change assignment details, please refer to the **Theory of Change Assignment Details** document found on Avenue2Learn.

Throughout this assignment, you will work in groups with a local non-profit organization that will be assigned to you.

The Assignment includes the following components and activities

1. **Theory of Change Lecture:** Non-profit agencies associated with United Way Halton and Hamilton will attend a lecture given by Lynn Fergusson introducing the concept of Theory of Change. Representatives from these agencies will be learning about the Theory of Change alongside you and some of them will offer up their organizations for experiential learning.
2. **Agency Data Gathering:** During the second week of the course students will work in groups conducting a 1-hour interview with your partner organization. A draft interview guide will be provided.
3. **Draft Theory of Change:** This involves completing a structured set of slides related to completing a theory of change including slides related to impacts, outcomes, activities, change mechanisms and a theory of change diagram. This draft will be reviewed, and feedback will be provided.
4. **Final Theory of Change:** Students will present theory final theory of change insights to their agency and others during an in-class theory of change showcase.

Component	Date	Description	Grade Assignment
Draft Theory of Change Slide Deck	Sep 24 th , 11:59pm	This presentation will be submitted on Avenue for feedback	5%
Final Theory of Change Slide Deck	Oct 4 th in-class	This presentation will happen in the in-class Theory of Change Showcase	15%

Student groups should submit their Draft Theory of Change Slide Deck in a single file on Avenue. Late assignments will be penalized at a rate of 25% per day – the TA requires time to grade and provide feedback.

Please acknowledge intellectual debts and facts and figures in your case using a superscript number and endnotes to reports. Draw on the library citation guide (<https://library.mcmaster.ca/sites/default/files/businesscitation.pdf>) paying particular attention to page 6 and page 15 for endnote and citation support.

COMMUNICATION AND FEEDBACK

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. All students must receive feedback regarding their progress prior to the final date by which a student may cancel the course without failure by default.

- *For Level 1 and Level 2 courses, this feedback must equal a minimum of 20% of the final grade.*
- *For Level 3 courses and above, this feedback must equal a minimum of 10% of the final grade.*

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

Grade Conversion

At the end of the course your overall percentage grade will be converted to your letter grade in accordance with the following conversion scheme.

LETTER GRADE	PERCENT	LETTER GRADE	PERCENT
A+	90 - 100	C+	67 - 69
A	85 - 89	C	63 - 66
A-	80 - 84	C-	60 - 62
B+	77 - 79	D+	57 - 59
B	73 - 76	D	53 - 56
B-	70 - 72	D-	50 - 52
		F	00 - 49

REQUESTING RELIEF FOR MISSED ACADEMIC 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/>

More specific instructions for each assignment can be found above under Course Deliverables.

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. **It is your responsibility to understand what constitutes academic dishonesty.**

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 (notation reads: “Grade of F assigned for academic dishonesty”), and/or suspension or expulsion from the university.

For information on the various types of academic dishonesty please refer to the [Academic Integrity Policy](https://secretariat.mcmaster.ca/university-policies-procedures-guidelines/), located at <https://secretariat.mcmaster.ca/university-policies-procedures-guidelines/>

The following illustrates only three forms of academic dishonesty:

- plagiarism, e.g. the submission of work that is not one’s own or for which other credit has been obtained.
- improper collaboration in group work.
- copying or using unauthorized aids in tests and examinations.

AUTHENTICITY/PLAGIARISM DETECTION

Some courses may use a web-based service (Turnitin.com) to reveal authenticity and ownership of student submitted work. For courses using such software, students will be expected to submit their work electronically either directly to Turnitin.com or via an online learning platform (e.g. A2L, etc.) using plagiarism detection (a service supported by Turnitin.com) so it can be checked for academic dishonesty.

Students who do not wish their work to be submitted through the plagiarism detection software must inform the Instructor before the assignment is due. No penalty will be assigned to a student who does not submit work to the plagiarism detection software.

All submitted work is subject to normal verification that standards of academic integrity have been upheld (e.g., on-line search, other software, etc.). For more details about McMaster’s use of Turnitin.com please go to www.mcmaster.ca/academicintegrity.

COURSES WITH AN ON-LINE ELEMENT

Some courses may use on-line elements (e.g. e-mail, Avenue to Learn (A2L), LearnLink, web pages, capa, Moodle, ThinkingCap, 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, user names 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 a course that uses on-line elements will be deemed consent to this disclosure. If you have any questions or concerns about such disclosure, please discuss this with the course instructor.

ONLINE PROCTORING

Some courses may use online proctoring software for tests and exams. This software may require students to turn on their video camera, present identification, monitor and record their computer activities, and/or lock/restrict their browser or other applications/software during tests or exams. This software may be required to be installed before the test/exam begins.

CONDUCT EXPECTATIONS

As a McMaster student, you have the right to experience, and the responsibility to demonstrate, respectful and dignified interactions within all 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. use of Avenue 2 Learn, WebEx or Zoom for delivery), will be taken very seriously and will be investigated. Outcomes may include restriction or removal of the involved students’ access to these platforms.

ACADEMIC ACCOMMODATION OF STUDENTS

Students 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.

ACADEMIC ACCOMMODATION FOR 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.

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 either the instructor for the purpose of authorized distribution, or by a student for the purpose of personal study. Students should be aware that their voice and/or image may be recorded by others during the class. Please speak with the instructor if this is a concern for you.

COURSE MODIFICATION

From time to time there may be a need to remove/add topics or to change the schedule or the delivery format. If these are necessary, you will be given as much advance notice as possible.

Changes will be communicated through regular McMaster communication channels, such as McMaster Daily News, A2L and/or McMaster email.

GENERATIVE AI

Students may use generative AI for ***brainstorming*** their work throughout the course so long as the use of generative AI is referenced and cited following citation instructions given in the syllabus. Use of generative AI outside the stated use of ***brainstorming*** without citation will constitute academic dishonesty. It is the student's responsibility to be clear on the limitations for use and to be clear on the expectations for citation and reference and to do so appropriately.

RESEARCH USING HUMAN SUBJECTS

All researchers conducting research that involves human participants, their records or their biological material are required to receive approval from one of McMaster's Research Ethics Boards before (a) they can recruit participants and (b) collect or access their data. Failure to comply with relevant policies is a research misconduct matter. Contact these boards for further information about your requirements and the application process.

McMaster Research Ethics Board (General board): <https://reo.mcmaster.ca/>

Hamilton Integrated Research Ethics Board (Medical board): <http://www.hireb.ca/>

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 to Learn and/or McMaster email.

ACKNOWLEDGEMENT OF COURSE POLICIES

Your enrolment in IBH 3BB3 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.

COURSE SCHEDULE

**IBH 3BB3
Strategy for Organizations**

Week	Overview and Learning Goals	Readings, Cases, and Class Activities	Dates and Deadlines
1 Week of Sept 4 th	Introduction to Strategic Management <ul style="list-style-type: none"> What is strategy? Theory of Change 	<ul style="list-style-type: none"> Lecture: What is Strategy? Reading: Porter’s What is Strategy Reading: “The Nature of Nonprofit Organizations” from Strategic Management in Nonprofit Organizations Class 1 Readings available through Avenue Guest Presentation: Theory of Change Lecture, Lynn Fergusson Partner at Social Impact Advisors 	<i>Multiple Choice Question Due Sunday September 10th at 11:59pm</i>
2 Week of Sept 11 th	Analysis of External Environment – Problem Space <ul style="list-style-type: none"> Models of rivalry and competition Industry analysis Understanding problem space 	<ul style="list-style-type: none"> Case: Cola Wars Continue: Coke and Pepsi in 2010 Exercise: Conduct external industry analysis Lecture: External analysis Reading: “External Environment” from Strategic Management in Nonprofit Organizations Class 2 Readings available through Avenue 	<i>Multiple Choice Question Due Sunday September 17th, 11:59pm</i>
3 Week of Sept 18 th	Resources and Capabilities <ul style="list-style-type: none"> Resource Based View Capabilities 	<ul style="list-style-type: none"> Case: Kombi Sports Inc.: Staying Ahead of the Curve Class 3 Readings available through Avenue Exercise: Building a Getaway Vehicle 	<i>Multiple Choice Question Due Sunday September 24th, 11:59pm Draft Theory of Change assignment due Sunday September 24th, 11:59pm</i>

4 Week of Sept 25 th	Business-Level Strategy <ul style="list-style-type: none"> • Generic business strategies • Value price and cost Framework 	<ul style="list-style-type: none"> • Case: A Maestro without Borders: How Andre Rieu Created the Classical Music Market for the Masses • Class 4 Readings available through Avenue • In Class Theory of Change workshop 	<i>Multiple Choice Question Due Sunday October 1st, 11:59pm</i>
5 Week of Oct 2 nd	Theory of Change Case Theory of Change Showcase	<ul style="list-style-type: none"> • Event: Theory of Change showcase 	<i>Theory of Change Showcase</i>
6 Week of Oct 9 th	Midterm Recess		
7 Week of Oct 16 th	Managing Value Chains; Certifications <ul style="list-style-type: none"> • Value Chains • Certification systems 	<ul style="list-style-type: none"> • Case: Ikea’s Global Sourcing Challenge: Indian Rugs and Child Labor • Live Case presentation – Guest Speaker • Class 7 Readings available through Avenue 	<i>Multiple Choice Question Due Sunday October 22nd 11:59pm</i>
8 Week of Oct 23 rd	Collective Impact and Scaling <ul style="list-style-type: none"> • Collective Impact • Cross-sector partnership • Scaling, Replicating and Growth 	<ul style="list-style-type: none"> • Case: Dell: Upcycling Ocean Plastics Through Supply Chain Innovation • Read: “Scaling” from Engine of Impact • Lecture: Scalability and Replicability • Class 8 Readings available through Avenue 	
9 Week of Oct 30 th	In Class Midterm Exam		<i>Live Case – Group Analysis due Sunday November 5th 11:59pm</i>

10 Week of Nov 6 th	Stakeholders and ESG <ul style="list-style-type: none"> Stakeholders and Shareholders ESG 	<ul style="list-style-type: none"> Case: BlackRock’s ESG Investment Dilemma: Managing Stakeholder Differences. Class 10 Readings available through Avenue Guest: Meaghan McKnight, CEO of Make-a-Wish Canada 	
11 Week of Nov 13 th	Giving Voice to Values <ul style="list-style-type: none"> Giving voice to values Live Case Discussion 	<ul style="list-style-type: none"> Giving Voice to Values interactive exercises Live Case Workshop: Discussing the Live Case 	
12 Week of Nov 20 th	Implementing Strategic Change: Design, Structure, and Culture <ul style="list-style-type: none"> Realized and emergent strategy Organizational design Organizational Culture 	<ul style="list-style-type: none"> Case: Interface: The Journey Towards Carbon Negative Class 12 Readings available through Avenue Debate: Be it resolved that technology will fix our environmental and social challenges 	<i>Individual Live Case – Strategy due Sunday November 26th 11:59pm</i>
13 Week of Nov 27 th	New Case Workshop	<ul style="list-style-type: none"> TBD – but possibly exploring developing a new case based on IBH student work experiences. 	
14 Week of Dec 4 th	Final Client Presentations	<ul style="list-style-type: none"> Final group presentations 	<i>Final Live Case Presentations in class Presentations to be submitted via Avenue on Dec 5th, 11:59pm</i>

September						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
	Class Starts – Theory of Change					
10	11	12	13	14	15	16
MC Due		Interview Non-Profit Organization – Theory of Change				
17	18	19	20	21	22	23
MC Due						
24	25	26	27	28	29	30
MC Due Draft Theory of Change Assign						

October						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
MC Due			Theory of Change Showcase			
8	9	10	11	12	13	14
Midterm Recess						
15	16	17	18	19	20	21
			Live Case Kick off			
22	23	24	25	26	27	28
MC Due						
29	30	31				

November						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
			In Class Midterm			
5	6	7	8	9	10	11
Live Case Group Analysis						
12	13	14	15	16	17	18
19	20	21	22	23	24	25
Live Case Strategy - Individual						
26	27	28	29	30		

December						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
		Presentation Slides on Avenue	Presentations In class		LAST DAY	

LEARNING OBJECTIVES AND READINGS

Class 1 – Introduction to Strategy; Exploring Organizational Types; Theory of Change

Learning Objectives

1. Form an opinion on what strategy is (and is not)
2. Understand different types of organizations
3. Introduction to Theory of Change

Required Reading

- Ketchen and Short Chapter 1 and 2
- Porter's What is Strategy – eReserves on Avenue
- How Strategy Differs for Non Profits <https://www.strategy-business.com/blog/Strategy-talk-How-strategy-differs-for-nonprofits>

Further Reading

- <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/eight-shifts-that-will-take-your-strategy-into-high-gear> (about the strategy process)
- <https://blog.hubspot.com/marketing/inspiring-company-mission-statements> (Some top mission/vision statements and some discussion)
- Martin, Social Entrepreneurship: The case for definition https://ssir.org/articles/entry/social_entrepreneurship_the_case_for_definition

Class 2 – Analysis of External Environment – Problem Space

Learning Objectives

1. Provide an assessment of industry attractiveness and what drives that attractiveness (using Porter's 5 Forces)
2. Analyze the role industry dynamics (ie PESTEL) play with respect to changing competitive conditions (Porter)

Required Reading

- Ketchen and Short - Chapter 3
- Porter's 5 Forces <https://hbr.org/video/3590615226001/the-explainer-porters-five-forces> (2 minutes)
- The 6th force for Non-Profits <https://www.forbes.com/sites/meehanjonker/2018/08/13/business-strategy-for-the-social-sector-in-praise-of-sharon-osters-6-forces-model/#65319552297b>

Further Reading

- The way we think about charity is dead wrong
https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong
- Confronting Uncertainty in Strategy <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/how-to-confront-uncertainty-in-your-strategy>
- Industry Analysis Videos – <https://www.youtube.com/watch?v=UUKAX0E4ckM> and <https://www.youtube.com/watch?v=LMZS2l0Urck>

Class 3 – Resources and Capabilities

Learning Objectives

1. Articulate the critical assumptions of the resource-based view
2. Apply the VRIO framework to assess the competitive implications of a firm's resources

Required Reading

- Ketchen and Short Chapter 4

Further Reading

- VRIO Model <https://www.strategicmanagementinsight.com/tools/vrio.html>
- Corporate Growing Pains: Build, Borrow or Buy?
<https://knowledge.insead.edu/strategy/corporate-growing-pains-build-borrow-or-buy-2318>
- Organizational health <https://www.mckinsey.com/business-functions/organization/our-insights/organizational-health-a-fast-track-to-performance-improvement>
- Capability Driven Strategy https://www.strategyand.pwc.com/media/file/CDS-Gain-the-right-to-win_infographic.pdf

Class 4 – Business Level Strategy

Learning Objectives

1. Define business level strategy and strategic positioning.
2. Explain what it means to be “stuck in the middle” and its implications for firm performance.
3. Use the Value, Price, and Cost framework to explain sources of competitive advantage.

Required Reading

- Ketchen and Short Chapter 5 and 6
- Generic Strategies Mini-Lecture <https://www.youtube.com/watch?v=V14kuqYEsxE>

Further Reading

- Value Price Cost Framework <https://www.youtube.com/watch?v=pQboj3NpG-k>
- Financial Ratios <https://www.bdc.ca/en/articles-tools/money-finance/manage-finances/pages/financial-ratios-4-ways-assess-business.aspx>

Class 7 – Managing Value Chains; Certifications

Learning Objectives

1. Understanding global supply chains and value chains
2. Apply a value chain analysis to understand which of the firm's activities generate differentiation and which drive costs.
3. Understand certification systems and their role in strategy
4. Impact beyond organizational boundaries

Required Reading

- Stanford Social Innovation Review – Creating High Impact Nonprofits
https://ssir.org/articles/entry/creating_high_impact_nonprofits#
- Engines of Impact Chapter 8 – eReserves on Avenue

Further Reading

- Delivering on the Promise of Nonprofits <https://hbr.org/2008/12/delivering-on-the-promise-of-nonprofits>
- Zeroing in on Impact, Stanford Social innovation Review
https://ssir.org/articles/entry/zeroing_in_on_impact

Class 8 – Collective Impact and Scaling

Learning Objectives

1. Describe the shared value creation framework and its relationship to competitive advantage
2. Understand how to assess impact and collective impact

Required Reading

- Engines of Impact, Chapter 8: Scaling – eReserves on Avenue
- Collective Impact https://ssir.org/articles/entry/collective_impact

Further reading

- Innoweave article – Spotlight on Collective Impact <https://innoweave.ca/blog/from-development-to-execution-spotlight-on-kingstons-collective-impact-journey/>
- The Need for Cross Sector Collaboration
https://ssir.org/articles/entry/the_need_for_cross_sector_collaboration
- Nonprofit mergers that work https://ssir.org/articles/entry/nonprofit_mergers_that_work
- About Canada's social innovation strategy <https://ccednet-rcdec.ca/en/new-in-ced/2018/11/22/government-canada-invests-805m-social-finance>

Class 10 –Stakeholders and ESG

Learning Objectives

1. Understanding the importance of considering an organization's different stakeholders
2. Distinguish stakeholder engagement from corporate social responsibility.
3. Understanding the challenges associated with managing competing stakeholder pressures.

Required Reading

- Milton Friedman On The Social Responsibility Of Business – Forbes Advisor
<https://www.forbes.com/advisor/investing/milton-friedman-social-responsibility-of-business/>
- Responsible Investing <https://www.riacanada.ca/responsible-investment/#what-is-ri>
- Beyond Corporate Social Responsibility, McKinsey Insights, <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/beyond-corporate-social-responsibility-integrated-external-engagement>
- Creating Shared Value
<https://www.youtube.com/watch?list=PL85B3155A0F0B30D0&v=1vK3cxnP6I4>

Further Reading

- Creating Shared Value <https://www.sharedvalue.org/about/what-is-shared-value/>
- Friedman’s What is the social responsibility of business.
<http://websites.umich.edu/~thecore/doc/Friedman.pdf>
- Triple Bottom Line <https://theconversation.com/explainer-what-is-the-triple-bottom-line-22798>

Class 11 – Giving Voice to Values

Learning Objectives

1. Understanding our own values and their relationship to work
2. Learning techniques to understand value conflict and act on values in challenging situations

Class 12 - Implementing Strategic Change

Learning Objectives

1. Understand the levers managers use to effect strategic change.
2. Students should understand the critical importance of culture to strategy.

Required Reading

- Ketchen and Short Chapter 9 and Chapter 10
- A single approach to culture transformation may not fit all
<https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/a-single-approach-to-culture-transformation-may-not-fit-all>