



**IBH 3BB3 Strategy for Organizations
Fall 2025 Course Outline**

**Strategic Management Area
DeGroote 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.

TA

Sierra Haziza

hazizas@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.

STRATEGIC MANAGEMENT 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 Ivey Publishing https://www.iveypublishing.ca/s/ivey-coursepack/a1ROF000004IAbN2AU	\$48.55
Strategic Management OER Textbook – Ketchen and Shook https://opentextbc.ca/strategicmanagement/	Free
Course content and readings http://avenue.mcmaster.ca	Free
Top Hat Membership	Free

Course Materials:

This course uses a courseware package that includes teaching cases that are used to teach and explore strategic concepts.

The course also leverages an open access resource textbook that contains readings on strategic management.

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
- Reading assignments and articles
- Additional information about course evaluation components including rubrics
- Course documents such as this syllabus, any amendments to the schedule

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

You can register by simply visiting the course website: <https://app.tophat.com/e/520853>

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) reflections on key strategic concepts. The Top Hat platform will be used to facilitate this.

After each class, students will submit a short reflection (~250 words). On most weeks, students will have time in class to complete this, but these reflections will be due the **Friday following class at 11:59pm** on Top Hat.

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 of creating 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 **Friday (11:59pm)** following each of the **first 5 classes** (excluding the week of the Theory of Change Showcase), 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.

Multiple Choice submissions can be updated up until the final submission. This means you can improve the quality of the questions you submit up until that time simply by uploading a new spreadsheet to the same dropbox.

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.

This exam will leverage the Avenue 2 Learn testing facility and your laptop, so bring what you need to sign in. That includes whatever device you might require to authenticate access.

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 executive 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. 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 to an Avenue dropbox. Exams that are handed in late will be penalized at a rate of 25% per day starting at 11:59pm on the Tuesday 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, October 2025."

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 Avenue. 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 our partnership with 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. These presentations will be tabletop, presenting just your group to our client. To be clear, it is not a formal presentation.

Component	Date	Description	Grade Assignment
Draft Theory of Change Slide Deck	Sunday Sep 21 st , 11:59pm	This presentation will be submitted on Avenue for feedback	5%
Final Theory of Change Slide Deck	Wednesday Oct 1 st — 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.degrootemcmaster.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.

For the Live Case, students will be using an AI agent created by the professor to support developing strong live cases. More information will be provided in class.

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

Week	Overview and Learning Goals	Readings, Cases, and Class Activities	Dates and Deadlines
1 Week of Sept 1 st	Introduction to Strategic Management - Introduction to the Course - What is strategy? - Strategy Triangle - Theory of Change Introduction	Lecture: What is Strategy? Reading: Porter, M. E. (1996). What is strategy? In <i>Harvard business review</i> (Vol. 74, Number 6, pp. 61–78) – Available free through library Guest Presentation: Theory of Change Lecture, Lynn Fergusson	<i>Top Hat and MC Question Due Friday 11:59pm</i>
2 Week of Sept 8 th	Analysis of the External Environment – Problem Space - Models of rivalry and competition - Industry analysis - Understanding problem space	Case: Cola Wars Continue: Coke and Pepsi in 2010 Lecture and Exercise: Conducting external industry analysis	<i>Top Hat and MC Question Due Friday 11:59pm</i> <i>Theory of Change Interviews</i>
3 Week of Sept 15 th	Resources and Capabilities - Resource Based View - Capabilities - VRIO Model - Performance Matrix	Case: Aldi and the Hard-Discounters March Across America Case: (handout in class) From Pennies to Profit: The Ryan Trahan Blueprint to Building a YouTube Powerhouse Exercise: Understanding Capabilities	<i>Top Hat and MC Question Due Friday 11:59pm</i> <i>Draft Theory of Change due September 21st</i>
4 Week of Sept 22 nd	Business-Level Strategy - Generic business strategies - Willingness to pay	Case: Unlucky 13? The journey of Taylor Swift to stardom - Watch: Generic Strategies Mini-Lecture https://www.youtube.com/watch?v=V14kuqYEsxE (5 minutes) Workshop: Theory of Change	<i>Top Hat and MC Question Due Friday 11:59pm</i>

Week of Sept 29 th	Theory of Change Showcase in Class		
5 Week of Oct 6 th	Understanding the Value Chain - Value Chain - Build, Borrow or Buy	Case: Netflix: Will Content be Enough Workshop: Live Case presentation	<i>Top Hat and MC Question Due Friday 11:59pm</i>
Week of Oct 13 th	Midterm Recess		
6 Week of Oct 20 th	Collective Impact and Scaling - Collective Impact - Scaling, Replicating and Growth - Certification systems	Case: Dell: Upcycling Ocean Plastics Through Supply Chain Innovation Read: "Scaling" from Engine of Impact – Chapter 8 in eReserves on Avenue Lecture and Exercise: Scalability and Replicability Surprise Guest Series Midterm Review	<i>Live Case Questions due Monday October 20th at 11:59pm</i>
Week of Oct 27 th	In Class Midterm Exam		
Week of Nov 3 rd	Identifying Strategy Gaps Strategic alignment	Live Case Workshop: Identifying gaps while in groups and looking to solutions Lecture and Exercise: Strategic Gaps	<i>Live Case – Group Analysis due Tuesday November 4th 11:59pm</i>
7 Week of Nov 10 th	Managing Stakeholders - Stakeholders and Shareholders - Managerial Perception - Greenwashing	Case: BlackRock's ESG Investment Dilemma: Managing Stakeholder Differences. Guest: Meaghan McKnight, CEO of Make-a-Wish Canada	

8 Week of Nov 17 th	Implementing Strategy • Structure, Culture, and Capabilities • Crisis Curve	• Case: Will a Bank's New Technology Help or Hurt Morale? • Live Case with Client	<i>Individual Live Case – Strategy due Sunday November 23rd 11:59pm</i>
9 Week of Nov 24 th	Creating sustainable value through innovation • First Mover advantage • Creating Sustainable Value	• Case: Interface: The Journey Towards Carbon Negative • Debate: Be it resolved that technology will fix our environmental and social challenges	
Week of Dec 1 st	Final Client Presentations	Final group presentations	<i>Final Live Case Presentations in class</i>

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

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

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

December						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	6
			Live Case Presentations			

Learning Objectives Class 1 – Introduction to Strategy and Theory of Change¹

LEARNING OBJECTIVES

1. Form an opinion on what strategy is, and is not
2. Understand the Theory of Change framework

REQUIRED READING

- Porter's What is Strategy, Harvard Business Review – find it for free at the library
- The way we think about charity is dead wrong (19:47 minutes video)
https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong

FURTHER READING

- Ketchen and Short Chapter 1 and 2
- A plan is not a Strategy (Video 9:31) <https://www.youtube.com/watch?v=iuYlGRnC7J8>

Class 2 – Analysis of External Environment – Problem Space

LEARNING OBJECTIVES

1. Assess what drives industry profitability using Porter's 5 Forces
2. Analyze how industry profitability changes over time using PEST and strategic foresight
3. Understand strategies to influence firm profitability given industry conditions

REQUIRED READING

- Industry Analysis Video 1 <https://www.youtube.com/watch?v=UUKAX0E4ckM> (12:52 minute video)
- Industry Analysis Video 2 <https://www.youtube.com/watch?v=LMZS2lOUrck> (10:35 minute video)

FURTHER READING

- Ketchen and Short - Chapter 3
- Confronting Uncertainty in Strategy <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/how-to-confront-uncertainty-in-your-strategy>

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
3. Understand and explain how a capability is distinguished from a resource
4. Explore how resources and capabilities are built and evolved
5. Understand and apply the performance matrix

REQUIRED READING

- VRIO Model <https://www.strategicmanagementinsight.com/tools/vrio.html>
- Searching for Sustained Success – Focus on Organizational Health
<https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/the-organization-blog/searching-for-sustained-success-focus-on-organizational-health>

FURTHER READING

¹ The first person to email me saying they saw this in the syllabus gets a 1% bonus on their final grade.

- Ketchen and Short Chapter 4

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.
4. Explain what willingness to pay means and its connection to strategy

REQUIRED READING

- Generic Strategies Mini-Lecture (Video 4:47) <https://www.youtube.com/watch?v=V14kuqYEsxE>

FURTHER READING

- Ketchen and Short Chapter 5 and 6

Class 5 – Understanding the Value Chain

LEARNING OBJECTIVES

1. Understand how firm and industry value chains intersect
2. Understand how firms close capability gaps using the build, borrow and buy framework

REQUIRED READING

- What is Value Chain Analysis <https://online.hbs.edu/blog/post/what-is-value-chain-analysis>
- Corporate Growing Pains: Build, Borrow or Buy? <https://knowledge.insead.edu/strategy/corporate-growing-pains-build-borrow-or-buy-2318>

Class 6 – Collective Impact and Scaling

LEARNING OBJECTIVES

1. Understand the conditions for successful collective impact initiatives
2. Understand and distinguish scaling and replication as growth options for organizations
3. Understand how to assess impact including the concept of additionality

REQUIRED READING

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

Class 7 – Managing Stakeholders

LEARNING OBJECTIVES

1. Distinguish stakeholder engagement from corporate social responsibility.
2. Understanding the challenges associated with managing competing stakeholder pressures.
3. Understand concepts related to double materiality

REQUIRED READING

- Milton Friedman On The Social Responsibility Of Business – Forbes Advisor <https://www.forbes.com/advisor/investing/milton-friedman-social-responsibility-of-business/>
- How to create a stakeholder strategy <https://hbr.org/2023/05/how-to-create-a-stakeholder-strategy>

- Double materiality and the CSRD background essentials (skim the double materiality part)
<https://novisto.com/resources/blogs/double-materiality-and-the-csrd-background-essentials>

FURTHER READING

- Responsible Investing <https://www.riacanada.ca/responsible-investment/#what-is-ri>

Class 8 - Implementing Strategic Change

LEARNING OBJECTIVES

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

REQUIRED READING

- 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>

FURTHER READING

- Ketchen and Short Chapter 9 and Chapter 10

Class 9 – Creating Sustainable Value through Innovation

LEARNING OBJECTIVES

1. Understand the relationship between sustainability and strategy
2. Understand the mechanisms of first mover advantage

REQUIRED READING

- NA

FURTHER READING

- Ketchen and Short Chapter 9 and Chapter 10