Instructor: Karen L. Middleton, Ph.D.
Office: OCNR 321
Phone: (361) 825-5533
Fax: (361) 825-5609
e-mail Karen.Middleton@tamucc.edu
Office Hours: M 12:00-2 PM; 3:30-5:30 PM; W 3:30-5:30 PM Other times available upon request
Class Case: To be determined
Best Case Examples: On reserve in the library
BP Slides: BB9 class website
Prerequisites: Open only to business majors who are in their last semester or within 12 hours of graduation and have completed all other courses in the Business Core.

Course Description
Analytical process and methodology for policy-strategy formulation and implementation; approached as a multi-level, integrative process. Analysis focused on integration of skills and competencies acquired through the BBA program.

Learning Objectives
When this course is completed, the student will be able to:
1. Demonstrate the research capabilities and critical thinking necessary to gather and interpret key environmental data.
2. Exhibit the analytical and ethical decision-making skills necessary for dealing with complex strategic planning.
3. Analyze a firm’s mission, including broad statements about its purpose, philosophy, and goals.
4. Assess a firm’s external environment, including the general, industry, and competitive environments.
5. Analyze a firm’s options by matching its internal resources with external environmental factors, suggest alternative courses of action, and present well-supported recommendations for future action.
6. Illustrate the communication and computer skills necessary to make effective individual and team oral and written presentations.

Relationship to Other Coursework
Basic functional area courses in marketing, finance, production-operations management, and human resource management, and organizational behavior provide essential understanding of resource requirements to support organizational strategy. Other courses in economics, accounting, information systems, and quantitative management provide tools for various analytical processes used in strategy formulation and evaluation.
**Instructional Methodology**
This class includes lectures, class discussions, simulations, and case analyses by groups, the class, and the instructor. Remember that 65% of your grade depends on your **INDIVIDUAL** efforts. Only 35% is dependent on your top management team work.

Performance Evaluation and Grading:
- Strategic Analysis Project: 500 points
- Professional Participation: 210 points
- Major Field Test: 100 points
- Three Tests (@200 each): 600 points
**TOTAL POINTS: 1410 POINTS**

**r al and Written Communication Content**

PLEASE REFER TO THE WISH LIST ON BB9 CLASS WEBSITE FOR WRITING AND RESEARCH GUIDELINES.

Each group must prepare two preliminary reports with presentations during the course of the semester. The goal of these reports is practice and feedback so that the final report and presentation is of the highest professional caliber. **Copies of the presentation slides must be included at the end of each report.** Each group will submit a final report with presentation slides at the end of the semester which incorporates both reports and final recommendations into an integrated, well developed final report. Each student must submit a group evaluation form after each report is presented. In addition, each examination will include essay questions with quality of writing included in the evaluation of the responses.

All reports must be supported with accurate and wide-ranging research. “Common knowledge” is not accurate research and may not be used in the report. Do not use textbooks as research sources. Avoid the use of ANY quotes and definitions in your business writing. **Keep It Short and Simple (KISS)** for good business writing.

THE TEAM’S TWO PRELIMINARY REPORTS SHOULD BE UPLOADED ON FILE EXCHANGE FOUND ON YOUR GROUP WEBSITE IN BB9 BY NOON ON THE DAYS THE TEAM PRESENTS THE REPORT TO THE CLASS. I WILL USE TURNITIN.COM TO CHECK FOR POTENTIAL PLAGIARISM IN THE UPLOADED REPORTS BEFORE I BEGIN GRADING. ALL UPLOADED REPORTS MUST INCLUDE: (1) COVER PAGE; (2) TABLE OF CONTENTS INCLUDING THE LIST OF TABLES AND THE LIST OF FIGURES; (3) EXECUTIVE SUMMARY; (4) THE REPORT WITH CORRECT IN-TEXT CITATIONS; (5) REFERENCES; AND (6) SLIDE PRESENTATION.

YOUR TEAM CAN CHECK FOR PLAGIARISM BY USING “WRITECHECK FOR STUDENTS” FOUND ON THE TURNITIN.COM WEBSITE.

**Technology Applications**
The use of spread sheets for analysis of performance as well as analysis of proposed strategic actions is required. All submissions must use word processing software and APA format. Three major types of data will need to be collected: **Environmental/Industry Data** (macro-environmental trends, industry outlook, strategic group analysis); **Company Data** (history, competitive advantage, corporate and business level strategies); and **Competitor Data** (competitive strategies, strengths and weaknesses). Required information sources include: US
Industry and Trade Outlook; management discussions and financial data from five years of SEC 10K filings; and a minimum of ten relevant articles from reputable magazines or journals. Mergent, Business Source Complete, and Lexus-Nexus are excellent online research resources. **Avoid using personal blogs or open system research sites (e.g., Wikepedia, Investopedia; pedia anything!). The accuracy of information on such open systems is questionable at best.**

**Major Field Test**
The Major Field Test (MFT) is required for all students pursuing the Bachelor of Business Administration degree and will be administered in the MGMT 4388, Administrative Policy and Strategy course. To prepare for this test, business majors are advised to retain their class notes, textbooks and other relevant materials from this class and the other business core courses and to fine-tune their readiness for the MFT by completing the online MFT review available through the COB website at [www.cob.tamucc.edu](http://www.cob.tamucc.edu).

**Grade Appeals**
As stated in University Rule 13.02.99.C2, Student Grade Appeals, a student who believes that he or she has not been held to appropriate academic standards as outlined in the class syllabus, equitable evaluation procedures, or appropriate grading, may appeal the final grade given in the course. The burden of proof is upon the student to demonstrate the appropriateness of the appeal. A student with a complaint about a grade is encouraged to first discuss the matter with the instructor. For complete details, including the responsibilities of the parties involved in the process and the number of days allowed for completing the steps in the process, see University Rule 13.02.99.C2, Student Grade Appeals, and University Procedure 13.02.99.C2.01, Student Grade Appeal Procedures. These documents are accessible through the University Rules Web site at [http://www.tamucc.edu/provost/university_rules/index.html](http://www.tamucc.edu/provost/university_rules/index.html). For assistance and/or guidance in the grade appeal process, students may contact the Office of Student Affairs.

**Global Perspectives**
Global perspectives will be highlighted through strategic assessment methodology as well as through case analysis. Since a global marketplace is of substantial significance to increasing numbers of businesses, the global dimensions of strategic management are of prime importance and are accordingly integrated through much of this course.

**Demographic Diversity Perspectives**
Contrasts in cultural interests and values as aspects of strategy formulation and implementation will be illustrated through case analysis and in-depth strategic analyses.

**Political, Social, Legal, Regulatory, and Environmental Perspectives:**
These perspectives identify standard categories for external environmental analysis in strategy formulation, and are relevant in each of the cases and firms that are analyzed. Thus the coverage of these perspectives is extensive by nature of the strategic management process.

**Professional Participation**
Professionalism in the classroom is an antecedent of professionalism in the workplace. Consequently, the development of professionalism is an important objective of the undergraduate business curriculum. Professionalism in the classroom includes: required attendance at all presentations; regular attendance at group meetings and classes; proactive preparation for and full participation in classes and group meetings; asking questions to clarify your understanding of the assignments; completion of projects and homework in the assigned timeframe; behaving ethically as outlined in the COB Code of Ethics contract you previously signed;
avoiding harassment and retaliation; and maintaining a high degree of respect and civility for the diversity represented on this campus.

Please keep copies of all your contributions to your team’s research paper. You may be asked to furnish copies of your research, written submissions, home work, and team agenda items that support your individual participation in order to receive individual professional participation points.

Attendance Policy
Attendance and participation are critical for adequate performance in this course. You are required to be in attendance at all presentations, the library training session, and the administration of the Major Field Test. The professor reserves the right to deduct 100 points from a student's accumulated total points for EACH absence in excess of three. Additionally, late assignments to Team members or to the professor will not be accepted, resulting in the loss of points. Since every student is entitled to full participation in class without interruption, all students are expected to be in class and prepared to begin on time. Disruption of class will not be tolerated. Anyone arriving ten minutes or more after the start of class will be considered absent for the day. You do not need to enter the classroom as it is extremely disruptive to those class members who are on time and have already started their work for the day.

Academic Honesty
All students are expected to maintain a high standard of ethics in their academic activities. Hence, any form of academic misconduct is considered a serious matter. In this context, forms of academic misconduct include (1) Cheating, (2) Fabrication, Falsification, or Forgery, (3) Plagiarism, (4) Multiple Submission, and (5) Complicity. Sanctions for a student's academic dishonesty may include, but are not limited to (1) a written reprimand, (2) requirement to re-do the work in question, (3) requirement to submit additional work, (4) lowering of grade on work in question, (5) assigning grade of ‘F’ to work in question, (6) assigning grade of ‘F’ for the course, and/or (7) recommendation for more severe punishment. Additional sanctions may include disciplinary probation, suspension, or dismissal from the university. All assignments and exams are expected to be done independently unless otherwise specifically noted in the instructions.

Disabilities Accommodations:
The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please call or visit Disability Services at (361) 825-5816 in Driftwood 101.

If you are a returning veteran and are experiencing cognitive and/or physical access issues in the classroom or on campus, please contact the Disability Services office for assistance at (361) 825-5816.

Summary of Topical Coverage:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview of Strategic Management Process</td>
<td>4</td>
</tr>
<tr>
<td>Assessments: External and Internal</td>
<td>7</td>
</tr>
<tr>
<td>Industry Analysis and Competitor Analysis</td>
<td>7</td>
</tr>
<tr>
<td>Imperatives: Competitiveness, Innovation, Quality Technology, Global Factors, Organizational Development, Leadership</td>
<td>4</td>
</tr>
<tr>
<td>Course</td>
<td>Hours</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>International Strategies</td>
<td>4 hours</td>
</tr>
<tr>
<td>Corporate Strategy; Acquisitions, Mergers</td>
<td>6 hours</td>
</tr>
<tr>
<td>Implementation Overview</td>
<td>1 hour</td>
</tr>
<tr>
<td>Governance and Leadership</td>
<td>4 hours</td>
</tr>
<tr>
<td>Entrepreneurship and Innovation</td>
<td>3 hours</td>
</tr>
<tr>
<td>Ethics</td>
<td>2 hours</td>
</tr>
<tr>
<td>Exams</td>
<td>3 hours</td>
</tr>
</tbody>
</table>

**Total Hours**  

**45 hours**
**ACTIVITIES AND GRADING**

**ALL WRITTEN SUBMISSIONS MUST BE IN APA FORMAT, OR TEN (10) POINTS WILL BE DEDUCTED FROM THE POSSIBLE POINTS. THE TEAM MUST THEN SUBMIT A CORRECTED PAPER. EACH ONLINE SUBMISSION WILL BE SUBMITTED TO TURNITIN.COM TO CHECK FOR POTENTIAL PLAGIARISM.**

**STRATEGIC ANALYSIS PROJECT (GROUP WORK): 500 points (35% of your grade)**

This is the major activity of the class. The project is detailed in Attachment I. Each preliminary presentation component should be 10 minutes in length, and the final report should be about 15 minutes. All team members must participate in each presentation. For instance, each component/section of your presentation could be given by different team members.

**TESTS (INDIVIDUAL WORK): 600 points (43% of your grade)**

Three tests are given during the semester. No makeup exams will be given unless arranged at least one week in advance or for hospitalization. Each test will include twenty-five (25) true-false questions @2 points each (50 points), ten (10) multiple-choice questions @5 points each (50 points), and two essays @ 50 points each (100 points). You will need a 4”x11” green Scantron for each examination.

**PROFESSIONALISM (INDIVIDUAL WORK): 210 points (15% of your grade)**

I reserve the right to adjust group project points for individual contribution. I will assess this through the collection of assignments on the dates they are due in class as well as evaluation feedback from group members throughout the semester. Class attendance can also be a factor in this assessment. Clearly, missing ANY group presentation would be a problem. However, missing other classes that provide guidance in the project could indicate that you are not taking your group responsibilities seriously enough.

**MAJOR FIELD TEST (INDIVIDUAL WORK): 100 points (7% of your grade)**

The Major Field Test (MFT) is required for all students pursuing the Bachelor of Business Administration degree and is administered as part of the MGMT 4388, Administrative Policy and Strategy course. Students must also be enrolled in BUSI 0088, Major Field Test Review. Successful completion of the MFT is a requirement of MGMT 4388 and successful completion of the MFT is worth 100 points. Successful completion is defined as evidence that: (1) the student actively prepared for the exam using the online MFT review system (earning up to 50 points); and (2) evidence that the student performed adequately on the test (earning up to 50 points). The scoring for these two criteria will be provided to Dr. Middleton by the College of Business. The points for the MFT Review will be awarded as follows:

<table>
<thead>
<tr>
<th>Modules Passed at 80%</th>
<th>Credit</th>
<th>Total Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 modules</td>
<td>100%</td>
<td>50 points awarded</td>
</tr>
<tr>
<td>6 modules</td>
<td>85%</td>
<td>43 points awarded</td>
</tr>
<tr>
<td>5 modules</td>
<td>70%</td>
<td>35 points awarded</td>
</tr>
<tr>
<td>Less than 5 modules</td>
<td>0%</td>
<td>0 points awarded</td>
</tr>
</tbody>
</table>

Please note students may take the practice exams multiple times.
Points for the **MFT scores** will be awarded as follows:

<table>
<thead>
<tr>
<th>MFT Percentile Score</th>
<th>Credit</th>
<th>Total Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>75 to 100 Percentile</td>
<td>100%</td>
<td>50 points awarded</td>
</tr>
<tr>
<td>50 to 74 Percentile</td>
<td>75%</td>
<td>38 points awarded</td>
</tr>
<tr>
<td>25 to 73 Percentile</td>
<td>50%</td>
<td>25 points awarded</td>
</tr>
<tr>
<td>Less than 25 percentile</td>
<td>0%</td>
<td>0 points awarded</td>
</tr>
</tbody>
</table>

**THE MFT EXAMS WILL BE HELD IN THE OCNR COMPUTER LABS ON A FRIDAY ON A DATE THAT IS FORTHCOMING. PLEASE NOTE THAT FRIDAY IS NOT A REGULARLY SCHEDULED CLASS MEETING AND YOUR ATTENDANCE IS REQUIRED. FURTHER DETAILS ABOUT THE MFT EXAMS WILL BE FURNISHED BE THE COLLEGE OF BUSINESS ASSESSMENT COMMITTEE.**

**IN SUMMARY**

- Two preliminary reports with presentations during the course of the semester (100 POINTS EACH). The goal of these reports is **practice and feedback** so that the final report and presentation is of the highest professional caliber. **Be sure to include copies of your presentation slides at the end of each report.**
- A final report (200 POINTS) with presentation (100 POINTS) at the end of the semester which integrates both reports and your TMT’s recommendations into a smooth, well developed final report
- Each student must submit a group evaluation form after each report is presented.
- Please be aware that fully **65% of your final grade is based on your individual efforts**, while 35% is based on your Top Management Team’s reports and presentations.

**FINAL GRADES WILL BE ASSIGNED AS FOLLOWS:**

- 90-100% = A
- 80-89.99% = B
- 70-79.99% = C
- 60-69.99% = D
- BELOW 60% = F

**Statement of Civility**

Texas A&M-Corpus Christi is a comprehensive urban university located on the South Texas Gulf Coast focusing on the higher education needs of South Texas and the State. Our student body represents the diversity of our State, and will provide its future leaders. Together, the students, faculty and staff from our campus community, reflect a variety of backgrounds and cultures. The quality of life on and about the campus is best served by courteous and dignified interaction between all individuals, regardless of sex, ethnic or religious background, sexual orientation, or disability.

It is the expectation of this University that all members of the campus community will work to develop and maintain a high degree of respect and civility for the wealth of diversity in which we are all fortunate to live and work. To ensure that this expectation is met, the University will take whatever action is necessary to prevent, correct, and discipline behavior which violates the spirit and intent of regulations designed to promote respect and civility, and will take whatever steps are necessary to foster mutual respect among the campus community.
Harassment
Texas A&M-Corpus Christi believes that establishing a safe learning environment is necessary for an institution committed to the pursuit of excellence in instruction, research, and public service. Discrimination against, or harassment, or actions that are intended to harass, intimidate, or humiliate individuals on the basis of ethnicity, sex, religion or sexual preference is inconsistent with this institutional purpose and will not be condoned. Persons found guilty of harassment will be subject to disciplinary sanctions.

Retaliation Prohibited
Retaliatory action of any kind is prohibited when taken against a witness or other person providing testimony, or against the complainant seeking redress under the applicable procedures dealing with sexual harassment or any other grievance or appeal. Such retaliatory action shall be regarded as a separate and distinct cause for complaint.

<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPICS</th>
<th>ASSIGNMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td><strong>STRATEGIC MANAGEMENT INPUTS</strong>&lt;br&gt;9/4 Strategic Management and Strategic Competitiveness (BP1)</td>
<td>THE LEARNING OBJECTIVES FOR EACH SESSION ARE INCLUDED IN THE INTRODUCTION TO EACH CHAPTER. Chapter 1</td>
</tr>
<tr>
<td>Week 2</td>
<td>9/9 Strategic Intent—Vision, Mission, Objectives, Strategies, Tactics (BP2)</td>
<td>Chapter 1 START HERE FOR EXTRA CREDIT PROJECT, HOMEWORK DUE ON BB9 CLASS SITE 9/9 BY NOON</td>
</tr>
<tr>
<td>9/11 Application Homework Due: DIRECTIONS ARE ON BB9</td>
<td>Mission Statements</td>
<td></td>
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<tr>
<td>Week 3</td>
<td><strong>THE INDUSTRIAL/ORGANIZATIONAL VIEW OF THE FIRM (THE I/O MODEL)</strong>&lt;br&gt;9/16 The Macro/General Environment (BP3)</td>
<td>Mission Statements</td>
</tr>
<tr>
<td>9/18 Application Homework Due</td>
<td>Macro-Environmental Analyses: Class Case Top Management Teams formed</td>
<td></td>
</tr>
<tr>
<td>Week 4</td>
<td><strong>Library Resources: External Analyses</strong>&lt;br&gt;9/23 Porter’s Five Forces Model (BP4)</td>
<td>ATTENDANCE IS REQUIRED.</td>
</tr>
<tr>
<td>9/25</td>
<td>Chapter 2, continued</td>
<td></td>
</tr>
<tr>
<td>Week 5</td>
<td><strong>Application Homework Due</strong>&lt;br&gt;9/30 Strategic Groups and Competitor Analysis (BP5)</td>
<td>Five Forces Analyses of Class Case</td>
</tr>
<tr>
<td>10/2</td>
<td>Chapter 2, continued</td>
<td></td>
</tr>
<tr>
<td>Week 6</td>
<td><strong>TMT WORK DAY IN THE OCNR BREAK OUT ROOMS</strong>&lt;br&gt;10/7 INDUSTRY 1 TMT APPOINTMENTS WITH DR. MIDDLETON&lt;br&gt;10/9 INDUSTRY 2 TMT APPOINTMENTS WITH DR. MIDDLETON</td>
<td></td>
</tr>
<tr>
<td>Week 7</td>
<td><strong>External Analyses Reports and Presentations</strong>&lt;br&gt;10/14 AT END OF SESSION</td>
<td>Industry 1: Radio &amp; TV Communications Equipment</td>
</tr>
<tr>
<td>Date</td>
<td>Topic</td>
<td>Chapters</td>
</tr>
<tr>
<td>--------</td>
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</tr>
<tr>
<td>10/16</td>
<td>External Analyses Reports and Presentations</td>
<td>Industry 2: Medical Laboratories</td>
</tr>
<tr>
<td>10/21</td>
<td>Examination 1</td>
<td>Chapters 1 &amp; 2</td>
</tr>
<tr>
<td>10/23</td>
<td>THE RESOURCE BASED VIEW OF THE FIRM</td>
<td>Chapter 3</td>
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<tr>
<td></td>
<td>The Internal Environment: Resources, Capabilities, and Core Competencies</td>
<td></td>
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<tr>
<td></td>
<td>The VRIO Test &amp; Distinctive Competencies (BP6)</td>
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<td></td>
<td>Value Chain (BP7)</td>
<td></td>
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<tr>
<td>10/28</td>
<td>Business Level Strategies</td>
<td>Chapter 4</td>
</tr>
<tr>
<td></td>
<td>Generic Strategies (BP8)</td>
<td></td>
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<tr>
<td>10/30</td>
<td>Competitive Rivalry and Competitive Dynamics (BP9)</td>
<td>Chapter 5</td>
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<tr>
<td></td>
<td>Corporate Level Strategy</td>
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<td></td>
<td>Diversification (BP10)</td>
<td>Chapter 6</td>
</tr>
<tr>
<td>11/4</td>
<td>Examination Two</td>
<td>Chapters 3, 4, 5 &amp; 6</td>
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<tr>
<td>11/6</td>
<td>Merger and Acquisition Strategies (BP11)</td>
<td>Chapter 7</td>
</tr>
<tr>
<td></td>
<td>International Strategy (BP12)</td>
<td>Chapter 8</td>
</tr>
<tr>
<td>11/11</td>
<td>Cooperative Strategy (BP13)</td>
<td>Chapter 9</td>
</tr>
<tr>
<td></td>
<td>Corporate Governance (BP14)</td>
<td>Chapter 10</td>
</tr>
<tr>
<td>11/13</td>
<td>Organizational Structure and Controls (BP15)</td>
<td>Chapter 11</td>
</tr>
<tr>
<td></td>
<td>Strategic Leadership (BP16)</td>
<td>Chapter 12</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dr. Middleton will be available from 9-5 PM in the library for TMT assistance. You can also make appointments to ensure you get assistance.</td>
</tr>
<tr>
<td>11/18</td>
<td>Internal Analyses &amp; Strategic Analyses Reports and Presentations</td>
<td>Industry 2: Medical Laboratories</td>
</tr>
<tr>
<td>Week 13</td>
<td>11/25</td>
<td>TMT WORK DAY IN THE BREAK OUT ROOMS</td>
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<tr>
<td>11/27</td>
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<td>MFT PAYBACK DAY</td>
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<tr>
<td>Week 14</td>
<td>12/2</td>
<td>Final Presentations</td>
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<tr>
<td></td>
<td>12/4</td>
<td>Final Presentations</td>
</tr>
<tr>
<td>Week 15</td>
<td>12/9</td>
<td>Examination Three</td>
</tr>
<tr>
<td></td>
<td>12/11</td>
<td>READING DAY</td>
</tr>
<tr>
<td>Week 16</td>
<td>12/16</td>
<td>FINAL REPORTS DUE IN MY OFFICE BY 2 PM</td>
</tr>
</tbody>
</table>

**NOTE:**
- Internal Analyses & Strategic Analyses Reports and Presentations
  - ATTENDANCE IS REQUIRED.
  - RANDOM DRAW FOR FINAL PRESENTATION ORDER

**Industry 1: Radio & TV Communications Equipment**
ATTACHMENT 1

**PLEASE BACK UP YOUR WORK ON EXTRA DISKETTES.**

Your team will be assigned a firm from one of the following industries:

**INDUSTRY 1: Radio & TV Communications Equipment SIC 3663 NAICS 334220**
- Qualcomm, Inc QCOM
- Motorola Solutions Inc MSI
- EchoStar Corp SATS

**INDUSTRY 2: Medical Laboratories SIC 8071 NAICS 621511**
- Genomic Health, Inc. GHDX
- RadNet Inc. RDNT
- Bio-Reference Laboratories, Inc. BRLI

**Preliminary Report #1 - 100 points: External Analysis Report and Presentation**

*You MUST bring a handout for each team that includes your executive summary and most useful research sources.*

Chapters 1 and 2 are your primary resource for this portion of the project. As you identify the opportunities and threats in this industry, you should be examining the following six (6) General/Macro Environment Segments: demographic; economic; political/legal; sociocultural; technological; and global. The Industry Environment analysis should use Porter’s Five Forces Model as its basis. In the Competitive Environment at the firm level, you will use the Strategic Group Model and complete a competitor analysis of your firm and the members of your strategic group. You may use the financial ratios to support the firm level analysis. Include an Opportunities and Threats (O/T) Table with a discussion of each O/T.

**Caution: look for contrarian viewpoints.** Do not always depend on the information in company’s annual and 10k reports.

**It is extremely important that your team sets an agenda before each meeting.** Included in the agenda should be the topics that are going to be covered, work to be completed by each team member before the team meets, and the length of time your team will work on the project together. Share the leadership among each team member. The leader is responsible for keeping a record of the agenda and the accomplishments of each individual. I will collect the completed agendas from the team leaders before each class on the due dates identified in the class calendar (see the Agenda attachment). The results of attendance time in and time out, as well as the actual results of your meeting must be an honest accounting of your TMT’s efforts. These records will also have an impact on the awarding of professional participation points.

**THE FOLLOWING PAGE SHOWS THE ORDER IN WHICH I WILL PRESENT THE MATERIAL AND HOW YOUR EXTERNAL ANALYSIS REPORT WILL BE EVALUATED.**
External Analysis Report and Presentation Evaluation

Industry/Firm

Possible Points: 100

Points Earned:

1. General or Macro-Environment
   a. Economic Forces
   b. Socio-Cultural Forces
   c. Demographic Forces
   d. Political/Legal & Governmental Forces (You MUST include PACS & Trade Associations)
   e. Technological Forces
   f. Globalization Forces
   g. Physical/Environmental

2. Industry Level: Porter’s Five Forces Model

3. Firm Level: Strategic Dimensions Overview; Discussion and Implications of Static View of Ratios of Strategic Group Members and Industry Averages
   a. Liquidity Ratios
   b. Leverage Ratios
   c. Activity Ratios
   d. Profitability Ratios
   e. Growth Ratios
   f. Stock Analyses/Shareholders’ Return Ratios
   g. Published Rankings
   h. Comparison to the overall industry ratios

4. List and discuss the TMT’s perceptions of (1) the opportunities and (2) the threats in the general environment in rank order of importance.

5. Competitor Analysis of Your Firm and Your Strategic Group Members (see components in Figure 2.3, p. 64)

6. Executive Summary of External Analyses and Required References in APA Format (An Executive Summary summarizes your findings, not your methods for doing the analysis.)

7. Presentation Comments (Power Point Slides)
Preliminary Report #2 - 100 points

You MUST bring a handout for each team that includes your executive summary and useful research sources.

Part a - Internal Analysis Report and Presentation
Chapters 3-12 are your primary resource for this portion of the project. As you identify the strengths and weaknesses of your company be sure that you clearly discuss: their corporate mission, any distinctive competency that you identify, and indications of strengths and weaknesses found in your financial and stock analysis. Avoid being taken in by the positive spin often found in 10K and Annual Company Reports. Be sure to consult critical stakeholder resources in preparing this analysis.

Include a VRIO Table and a Strengths and Weakness (S/T) Table with discussion. In addition, provide a financial spreadsheet and analysis showing key financial trends over the past five years. Compare your firm’s financial ratios with those of your strategic group members and the industry averages and interpret the findings. Also conduct a stock analysis showing the history/trends of stock prices, p/e ratios, EPS, dividend payouts, and betas with comparisons to your strategic group members and the industry averages (where applicable).

Part b - Strategic Analysis Report and Presentation
Using the internal and external analyses you will match previously identified O/Ts and S/Ws to generate multiple strategic alternatives, and discuss the results of your TMT’s SWOT Matrix. Identify the Corporate Level Strategies chosen for your firm’s future strategic direction and the feasible set of strategic alternatives chosen from the SWOT Matrix that will support your chosen strategies.
INTERNAL/STRATEGIC ANALYSES REPORTS AND PRESENTATION

GROUP/INDUSTRY/FIRM:

Possible Points: 100  Points Earned:

1. Corporate Vision/Mission/Value Statements

2. Financial Ratio Analysis (5 years of data/trends; Include Comparisons of Strategic Group Members & Industry Averages)

3. Stock Analysis (5 years of data/trends; Include Comparisons of Strategic Group Members & Industry Averages)

4. Identify and discuss your firm’s resources and capabilities, then apply the VRIO Test to determine your core competencies.

5. List and discuss your firm’s core competencies, strengths and weaknesses in rank order from strongest to weakest.

6. Identify the firm’s **current Business Level Strategy and Corporate Level Strategy**, and provide research information that supports your categorization.

7. **Match** your external opportunities and threats and your internal strengths and weaknesses in a SWOT Matrix and create **feasible, actionable, and measurable** strategic alternatives.

8. Identify the Corporate Level Strategies chosen for your firm’s **future strategic direction** and the feasible set of strategic alternatives **chosen from the SWOT Matrix** that will support your chosen strategies.

9. Executive Summary of Internal Analyses and Required References in APA Format (An Executive Summary summarizes your **findings, not your methods** for doing the analysis.)

10. Presentation Comments (Power Point Slides)
Final Oral Presentation - 100 points
The final presentation must be approximately 15 minutes. It should also include a company snapshot to introduce the report and final versions of the external and internal analyses and final recommendations. The company snapshot should highlight the company’s business, mission, and strategies, and provide key data about the company such as trends in revenue, profits, and stock price. In this report, you will outline your objectives over multiple time perspectives, the tactics you will employ to implement them, and the controls you will use to monitor your progress.

Final Written Report - 200 points THIS FINAL REPORT IS THE ONLY HARD COPY REPORT THAT YOU WILL SUBMIT THIS SEMESTER.
Work at integrating and organizing the three sub-reports. Appearance and logical organization are important criteria for this report. A table of contents, list of tables, and list of figures is required in APA format. Please edit carefully in order to achieve a coherent style and appearance. Submit your report in a three-hole punched flexible binder with sections for the reports, references, and all three sets of presentation slides.

Data Gathering
There are three major types of data you will need to collect. This can be an effective way to divide data collection for your team.

- **Environmental/Industry Data** - economic trends, industry outlook, identify competitors
- **Company Data** - history, competitive advantage, strategy, company announcements
- **Competitor Data** - competitive strategies, competitor strengths and weaknesses, company announcements

Required Sources

- US Industry and Trade Outlook - an excellent starting place for the external analysis
- Management discussions and financial data from recent SEC 10K filings gives excellent insight into your own company and into your key competitors
- A minimum of ten relevant articles from reputable magazines or journals

Written Assignment Guidelines:
Two preliminary reports (External Analyses & Internal Analyses) will be uploaded to the BB9 class website for grading and feedback.

The FINAL Strategic Analysis Project should be three-hole punched and put in a three-ring binder with separators for each section.
Good business form (APA format) and a logical, focused writing style are essential for a high grade. Business writing strives to be clear, to the point, and as short as possible to adequately convey your ideas. “Keep It Short and Simple.” Be sure you have a clear focus and organization. Too often group papers read as a collection of separate papers without focus or style. **I strongly advise your team to preserve enough time for integration and editing. You need to read the entire paper together BEFORE you present.**

The major point of the paper should also be up front in the Executive Summary. An Executive Summary summarizes your findings, not your methods for doing the analysis. The reader should not have to guess where they are being taken. Managers have little time to read anything unnecessary. You've lost them if you haven't gotten their interest in the first half page.

Appearance is vital to a business report. All reports must be typed, using either an 11 or 12 point typeface, and have a one inch margin on all sides. Managers don't deal well with large blocks of texts. If it looks too hard to read, they'll never even pick it up. The use of headings and short paragraphs are essential to keep their interest. Take out all quotes that stop your reader, and paraphrase your research findings in your own words. It is in your best interest to finish your papers early so you can spend time reviewing, editing, and polishing. **TAKE PRIDE IN YOUR WORK!**
GROUP ORAL PRESENTATION EVALUATION

INDUSTRY/FIRM______________________       TEAM________________________

POSSIBLE POINTS: 100
TOTAL POINTS________________________

I. PRESENTATION

A. INFORMATION CLEARLY ORGANIZED _____
B. MANAGEMENT OF TIME _____
C. EQUAL DIVISION OF PRESENTATION MATERIAL _____
D. ABILITY TO ANSWER QUESTIONS, THINK AND RESPOND UNDER TIME PRESSURE _____
WRITTEN CASE EVALUATION

CASE_____________________________                 NAME(S)__________________________

POSSIBLE POINTS: 200

TOTAL POINTS____________________________________

I. ANALYSIS (Part I and Part II)
   A. CENTRAL ISSUES EXPLICITLY COMMUNICATED ______
   B. COMPLETENESS OF RESEARCH & COVERAGE ______
   C. DATA, SUPPORTING EVIDENCE & LOGIC USED TO SUPPORT DIAGNOSIS OF CENTRAL ISSUES ______

II. ALTERNATIVES/RECOMMENDATIONS (Part III)
   A. ALL IDENTIFIED ISSUES ADDRESSED BY RECOMMENDATIONS ______
   B. IN-DEPTH ANALYSIS OF ALTERNATIVES ______
   C. COMPLETENESS/DEPTH OF RECOMMENDATIONS & IMPLEMENTATION/EVALUATION ______

III. STYLE/ORGANIZATION
   A. INFORMATION CLEARLY ORGANIZED, CLARITY OF EXPRESSION, DEVELOPMENT OF LOGICAL ARGUMENTS ______
   B. EDITORIAL STYLE: GRAMMAR, PARAGRAPHS, HEADINGS AND SUBHEADINGS, SPELLING, APA FORMAT ______
   C. CLEARLY DESIGNED EXHIBITS, ASSUMPTIONS STATED AND SUPPORTED ______
CAPSTONE TOP MANAGEMENT TEAM AGENDA
(Due for each TMT meeting held during the semester)
I WILL COLLECT YOUR WEEKLY AGENDAS EACH MONDAY IN CLASS.

Firm Name & Date of the meeting___________________

Leader for the meeting__________________________________________________________

What is your Signed/Contracted “face” time(s)?______________________________

What was your Actual “face” time(s)?__________________________________________

Each team member should sign him/herself in and out.

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Outline of Meeting Agenda
Meeting Objectives Accomplished: You must specifically list each team members assignments. Please list the teammates who completed the assignments and the teammates who were absent or not prepared.

Leader and Agenda for the Next Meeting: List your objectives for the next team meeting and the team assignments that will be due.