Instructor: W. Scott Sherman, Ph.D.
Office: OCNR 384
Office Hours: TR 3:00-5:00 P.M., F 10:00 A.M.-12:00 Noon, or by appointment
Telephone: Office: 361-825-2167
E-mail: scott.sherman@tamucc.edu
Course Slides: Blackboard 9 (BB9.tamucc.edu)

The Course Objectives
This course is an analysis of strategic decision making, policy, and strategy. Focus is on the integrative and multi-functional nature of organizational strategy decision. Important areas in the course are the intensive analysis of the influence of administrative decisions on organizational outcomes. This course must be taken at the end of the program after completion of all advanced, non-elective courses. In unusual circumstances, it may be taken concurrently with the final non-elective courses with the written permission of the Director of Master’s Programs.

The course emphasizes pragmatic and active general management skills. It is important to note that a considerable body of theory has evolved across business disciplines which impact the formulation and implementation of strategy. The course uses lecture, case analysis, class discussion, and experiential learning in an interactive format to promote understanding and learning. The class will be conducted primarily in a Socratic format which places increased pressure on you as a student to be prepared and to be aware and involved in the discussion. Quality of contribution is much more important than quantity of contribution.

A student who has completed this course will be able to:
1. Integrate previously studied material and apply strategic concepts to solve business problems at the general manager level.
2. Analyze a firm externally and internally to identify its strengths, weaknesses, opportunities, and threats and propose actions based on that analysis.
3. Think strategically at functional, business, corporate, and international levels.
4. Present ideas effectively orally and in writing and as an individual and as a team.

IMPORTANT NOTES:
This course and all other courses offered by the College of Business are covered by the COB Student Code of Ethics (available online at www.cob.tamucc.edu) Provisions and stipulations in the code are applicable to all students taking College of Business courses regardless of whether or not they are pursuing a degree awarded by the COB.
ACTIVITIES AND GRADING

**Strategic Management Analysis Project:** (300 Points)
Each individual student will be responsible for completing an analysis of a viable and currently active publicly-traded company. The company may NOT have been on the Fortune 500 Most Admired List for the past five years. Appendix A of this syllabus lists the Most Admired Companies for 2007-2012. The company may NOT be a firm that has been analyzed in this course recently. The outline for this project is attached and will be discussed in the second class session. The analysis will include environmental analysis, industry analysis, analysis of the value chain and resource-based view of the firm, determination of generic strategy, discussion of competitive dynamics, and development of three to four viable options, strategic recommendation, and major implementation issues. The final paper will be no more than 30 pages, excluding appendices. Students will have an opportunity to schedule a one-hour project review session with Dr. Sherman in November. Please see course schedule for specifics.

**Comprehensive Examination:** (200 points)
A comprehensive examination will be given during the semester. **No makeup exam will be given.** The test will include true-false, multiple-choice, and essay questions.

**Group Strategic Analysis:** (150 points)
Students will be organized into learning groups early in the semester. Each learning group will be responsible for doing a complete analysis of a company in an industry determined by the class. Each learning group will be responsible for a presentation of not less than 15 minutes or more than 20 minutes on its company. Each learning group will be responsible for an paper of not more than 30 pages excluding appendices on its company to be submitted following its presentation. The general outline for the Strategic Management Analysis Project provides a good template for this analysis with the exception that the group paper does NOT include an implementation section. I reserve the right to adjust group project points for individual contribution.

**Group and Individual Analysis (200 points)**
A series of group cases will be assigned throughout the course. You should read these case materials, prepare written notes on these cases, and be prepared as part of your group to discuss these cases in class.

Individual data summaries and case analyses also will be assigned. The points for these assignments are:

- **Individual Case Data Summaries:** (100 points total)
  Each student will submit summaries of key data for each group case before the group case analysis. Dr. Sherman will provide further direction at the appropriate time. Each individual case analysis summary is worth twenty-five (25) points.

- **Individual Case Analyses:** (100 points total)
  This is the detailed case analysis by individual students. Dr. Sherman will provide further direction at the appropriate time. Each individual case analysis is worth fifty (50) points.
**Individual Contribution:** (100 points)
Class contribution will be assessed through the collection of data acquisition assignments on the dates the assignments are due in class as well as feedback from group members throughout the semester. Students are required to submit peer assessments of group member participation for the group cases and the group strategic analysis project. Class attendance will also be a factor in assigning the individual contribution grade. Failing to appear for group meetings, failing to appear for classes in general, and failure to participate in presentations or discussions is problematic.

**Major Field Test: (50 points)**
The Major Field Test (MFT) is required for all students pursuing Master’s degrees in Business Administration at Texas A&M University-Corpus Christi and is administered as part of the MGMT 5355, Administrative Strategy and Policy course. Successful completion of the MFT is a graded element in MGMT 5355 and successful completion of the MFT is worth 50 points. Successful completion is defined as evidence that the student performed adequately on the test by finishing at or above the 25th percentile nationally. Points for the MFT scores will be awarded in the following manner:

<table>
<thead>
<tr>
<th>MFT Percentile Score</th>
<th>Total Points Awarded</th>
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<tbody>
<tr>
<td>25th to 100th Percentile</td>
<td>50 points awarded</td>
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<tr>
<td>Less than 25th percentile</td>
<td>0 points awarded</td>
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MGMT 5355 students can register for the Major Field Test via the internet. The testing time for the graduate MFT is **Saturday, November 16, 2013 at 8:45AM**.

**Individual Company Selection Assignment: (50 points)**
Each student is responsible for determining a company to analyze for the individual strategic management analysis project. This analysis includes the steps described in Appendix II below. A form will be available on Blackboard™ at the appropriate time and will be graded based on the proper identification of a firm and a comparative firm.

**Grading**

<table>
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<tr>
<th>Item</th>
<th>Points</th>
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<tr>
<td>Strategic Management Analysis Project</td>
<td>300</td>
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<tr>
<td>Comprehensive Exam</td>
<td>200</td>
</tr>
<tr>
<td>Group Strategic Management Analysis Project</td>
<td>150</td>
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<tr>
<td>Individual Case Data Summaries</td>
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<td>Individual Assignments</td>
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<td>Individual Contribution</td>
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<td>Individual Company Selection Assignment</td>
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<td>Total Points</td>
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Grades will be determined based on a 1000 point basis.
Final Grades May Be Assigned As Follows
- 90-100%=A
- 80-89.99%=B
- 70-79.99%=C
- 60-69.99%=D
- Below 60%=F

Class Attendance
Attendance and participation are critical for adequate performance in this course. The professor reserves the right to deduct 100 points from a student's accumulated total points for EACH absence in excess of TWO. 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. All cell phones must be turned off as you enter the classroom. Disruption of class will not be tolerated. Anyone arriving ten minutes after the start of class or leaving after class started may be considered absent for the day.

Ethical Perspectives
The issue of ethics and the role of ethics in strategic analysis, formulation, and implementation will be discussed in class throughout the course. Ethical dilemmas within cases and situations studied will be analyzed and discussed.

Global Perspective
The emerging concept of multinational and international strategy will be specifically examined. Also, the role of emerging global interconnectedness is a critical element of strategic analysis of the macro-environment and the formulation of competitive environments in the modern marketplace will be discussed throughout the course.

Political, Social, Legal, Regulatory, and Environmental Perspectives
The impact and relevance of political, governmental, social and legal systems on strategy analysis, formulation, and implementation will be discussed in class and in the text. Regulatory and environmental perspectives will also be discussed.

Technological Perspective
The role of technology – both emerging new technologies and older basic technologies – can play a critical role in shaping the strategic process and the competitive marketplace. Case studies, lectures, and Socratic examinations of the role of technology will be used to help the student create an understanding of the role of technology in the strategy and in development of the strategy.

Academic Integrity/Plagiarism.
University students are expected to conduct themselves in accordance with the highest standards of academic honesty. Academic misconduct for which a student is subject to penalty includes all forms of cheating, such as illicit possession of examination materials, falsification, forgery, complicity or plagiarism. In this class, academic misconduct or complicity in an act of academic misconduct on an assignment or test will result in a grade of F.
Dropping a Class
I hope that you never find it necessary to drop this or any other class. However, events can sometimes occur that make dropping a course necessary or wise. Please consult with me before you decide to drop to be sure it is the best thing to do. Should dropping the course be the best course of action, you must initiate the process to drop the course by going to the Student Services Center and filling out a course drop form. Just stopping attendance and participation WILL NOT automatically result in your being dropped from the class. Friday, November 15, 2013 is the last day to drop a class with an automatic grade of “W” this term.

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. For assistance and/or guidance in the grade appeal process, students may contact the Office of Student Affairs.

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.

**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 Corpus Christi Hall 116.

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.

**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.
## Course Calendar

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<th>DATE</th>
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| SESSION 1  
R: 9/05 | Introduction And Overview  
Discuss Syllabus and Course Requirements  
Epistemological Concepts  
The Analytical Question | Ch 1  
WSSG1 |
| SESSION 2  
R: 9/12 | Research Methods  
Discuss SMAP  
What is Strategy?  
What is Performance? | WSSG2  
Data Assignment 1 distributed.  
Due 9/18 8 a.m. |
| SESSION 3  
R: 9/19 | General Environment  
Group Formation | Ch 2  
WSSG3  
Data Assignment 2 distributed.  
Due 9/25 8 a.m. |
| SESSION 4  
R: 9/26 | Review Macro Data  
Industry Environment | Ch 2  
WSSG4  
Data Assignment 3 distributed.  
Due 10/2 8 a.m.  
Individual Company Selection Assignment Due |
| SESSION 5  
R: 10/3 | Review Industry Data  
Value Chain | Ch 3  
WSSG5  
Data Assignment 4 distributed.  
Due 10/9 8 a.m.  
Individual Case Analysis 1 distributed.  
Due 8 a.m. 10/14. |
| SESSION 6  
R: 10/10 | Review Value Chain Data  
Resource Based View | Ch 3  
WSSG6 |
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<tr>
<th>SESSION 7</th>
<th>R: 10/17</th>
<th>Review RBV Data Generic Strategies</th>
<th>Ch 4, 5 WSSG7 Individual Case Analysis 2 distributed. Due 10/28 8 a.m.</th>
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<td>SESSION 8</td>
<td>R: 10/24</td>
<td>Competitive Dynamics Options</td>
<td>CH. 9 WSSG8 Schedule Group and 1-on-1 Meetings</td>
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<td>SESSION 9</td>
<td>R: 10/31</td>
<td>Comprehensive Examination</td>
<td>Ten (10) true-false questions, ten (10) multiple-choice questions, and two (2) essay questions.</td>
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<td>SESSION 10</td>
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<td>Group Presentations I</td>
<td>Attendance Required One-on-One meetings 11/09 - 11/18</td>
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<td>SESSION 11</td>
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<td>Group Presentations II</td>
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<td>SESSION 12</td>
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<td>Reserve Week</td>
<td>Group SMAP Due Electronic and physical (spiral or comb bound) copies by 7 p.m. 11/21</td>
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<td>Enjoy and Be Safe</td>
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<td>SESSION 13</td>
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<td>Corporate Strategy Implementation Issues Governance, Leadership</td>
<td>WSSG10 WSSG11</td>
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<td>SESSION 14</td>
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<td>Pulling it All Together</td>
<td>Individual SMAP Due Electronic and physical (spiral or comb bound) copies by 7 p.m. 12/12</td>
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NOTES ON PAPER SUBMISSION
Electronic Submission of Group and Final Papers
Fall 2013

The strategic analysis project is to be submitted in print and electronic form. The electronic form may be as e-mail attachments, or on a compact disc. Submitting the electronic form of the paper on a flash drive is permissible AND the flash drive WILL NOT be returned. The electronic form of the paper is to be identical to the printed form.

The electronic form is to be separated into three (3) files. The three files are described below:

1. File one should be named with the course number followed by the company name followed by the number 1. Example: MGMT5355 Target 1.doc. This file should contain the title page, table of contents, and executive summary.

2. File two should be named with the course number followed by the company name followed by the number 2. Example: MGMT5355 Target 2.doc. This file should contain the main body of the paper from introduction through implementation.

3. File three should be named with the course number followed by the company name followed by the number 3. Example: MGMT5355 Target 3.doc. This file should contain the paper references, appendices, and any other attachments.

All files should be MicrosoftWord 2003™ documents with computer suffix “.doc” or “docx”. Failure to follow the above WILL result in loss of points.
APPENDIX A

You may NOT use the following companies in your analysis.

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The Strategic Analysis Paper is an important part of M5355. The following is a suggested outline. The following are important (read required) elements:

1. An executive summary (no more than two pages). This summary should provide an abridged summary of the entire paper. This is not an introduction. It is a document that should be able to stand alone and be understood. No citations are necessary in the executive summary. This section is not counted in the thirty (30) page count.

2. A complete, self-contained report of no more than thirty (30) double-spaced pages. The page limitation excludes the executive summary, table of contents, exhibits, appendices, and ancillary material. A complete paper is critical, but conciseness and brevity are also important. It is very important that the paper demonstrate learning by referring to and referencing texts, articles, ideas covered in the program. It is critical that clear denotation and differentiation be made between original ideas and the ideas of others.

3. Include a title page and table of contents. Please number all pages and title all figures, exhibits, and appendices.

4. A complete bibliography should be included.

Note: The paper will be graded on the above items alone. The paper may include as many appendices, exhibits, or other material as desired, however the grade will be based on only items #1-4. Any critical material in appendices or not included in the 30-pages proper will NOT be considered. Please note that this means that tables depicting value chain, VRIO evaluation, and SWOT summaries need to be included in paper or not be considered for grading purposes.

RECOMMENDED FORMAT: (REC means recommended length)

EXECUTIVE SUMMARY (1-2 pages):
Summarize critical elements of the report for top-level review. The executive summary should be a stand-alone document. No citation and limited or no quotations. This summary should provide an abridged summary of the entire paper.

INTRODUCTION (1-2 pages):
Introduce the company, its mission, products/services, history, revenues, and provide other necessary information to orient the reader.

ANALYSIS (18-22 pages):
**External Analysis REC 7-9 Pages:**
Macro Environment: What major changes define the general environment based on the past 3-5 years? What are the key pieces of data over the past 3-5 years that support that those environmental elements are significant?
Industry Environment: How do Porter’s Five Forces define the structure of the industry? Be sure to include precise and concise data that supports each element of the five forces.
Competitive Analysis: Summarize competitors, their current size, revenue, market position, and current strategies in no more than one (1) paragraph per competitor.
**Internal Analysis REC 11-15 Pages:**

Finance: Provide key ratios that help the reader understand the company’s financial footing. Most detail behind ratios may be placed in an appendix. The section should include the ratios and the analysis of the ratios. REC: 2-3 pages.

Value Chain and discussion: Step the reader through the parts of the firm’s value chain and explain which items significantly add to or subtract from firm value and provide precise and concise data to back up the analysis and assessment. Note: Need to include Value chain chart. REC: 2-3 pages.

VRIO analysis and discussion: Step the reader through the evaluation and determination of sources of competitive advantage and disadvantage. Explain fully how and why conclusions were reached, and why the various evaluations (especially costly to imitate if yes) were reached. Note: Need to include VRIO chart and explanation. REC: 3 pages.

SWOT Summary: A SWOT Summary is recommended as a way to summarize the above external and internal discussions. The analysis should be based on the preceding General environment, five forces, value chain, and VRIO analyses. No new data should be included or presented and all parts of the SWOT should be significant elements of the prior analysis. Note: Need to include SWOT chart and explanation. REC: 2-3 pages.

**STRATEGY FORMULATION REC 4-6 Pages:**

Vision, Mission, Goals, and Objectives: Review the firm’s current vision, mission, and goals. Are the firm’s vision, mission, and goals consistent with its reality as set forth in the SWOT analysis? Recommend changes needed, if any.

Market Demands: What are the economic characteristics of the market, such as elasticity and market breadth, that the company competes within? Also, what are the primary competitive dynamic issues that define competition within the industry (1<sup>st</sup> movers, 2<sup>nd</sup> movers, reputations, size, speed of response, type of response, etc.)

Business Strategy Options: Define several (more than two) strategic alternatives for the client organization, including strengths and weaknesses of each, and explain why the option chosen was selected. Alternatives must be plausible (no straw horses), strategic (not tactical), and tied to SWOT.

Recommendations: Summarize why the option chosen was chosen and how the chosen strategy will impact company goals, and objectives, and strategic choices. Make clear recommendations.

**STRATEGY IMPLEMENTATION REC 4-6 Pages (Not part of group paper):**

Metrics and histories: Metrics are what are the 2-3 internal measures that the CEO or top management team of an organization would monitor to guide the firm towards success and what has been the history of these metrics in the past 3-5 years? REC: 2-3 pages.

Implementation Issues: Identify the primary implementation issues the strategy will face and how these issues may be addressed. Probable issues include leadership, governance, culture, and Human Resources. Please note that this section is not required in the group paper. REC: 2-3 Pages.

**Bibliography (Not counted in page limit)**

Remember: The references/bibliography should include at least ten (10) sources other than the textbook. Citing the professor is NOT appropriate.
ATTACHMENT II
NOTES AND RECOMMENDATIONS ON SELECTING
A FIRM FOR THE STRATEGIC MANAGEMENT ANALYSIS PROJECT (SMAP)

The firm you select for the SMAP is a firm that will require significant time and effort to analyze on your part. The following are guidelines and suggestions to help you identify a firm.

RULES:
The selected firm must meet the following six (6) rules to be eligible for consideration:

1. PUBLIC RULE: The firm must be publicly traded on an exchange regulated by the U.S. Security and Exchange Commission (SEC).
2. HISTORY RULE: The firm must have filed SEC Form 10-K for the most recent three (3) years and not have been in bankruptcy, receivership, or private ownership for the most recent three (3) years.
3. GOLDILOCKS RULE: The firm must be large enough to have sufficient resources to study and small enough that at least 70% of its revenues come from one dominant business area. The general guideline for this rule is that market capacity (or market cap, the number of shares times the current share price) should be between $300 million and $12 billion, and exceptions may apply on the market cap range.
4. COMPARATIVE RULE: A competitive firm must also be identified that is also publicly traded and meets the History and Goldilocks rule and that can be used for comparison purposes.
5. NOT ME RULE: A student MAY NOT analyze a firm he or she currently works for or has worked for while a graduate student at Texas A&M University-Corpus Christi.
6. NEW THIS YEAR: A student MAY NOT analyze a firm another 5355 student has done since the company last updated its 10-K filings. Firms that are prohibited under this rule are listed on the second page of this document.

In addition to meeting the six rules above, Dr. Sherman must approve each student’s proposed topic firm before the student can proceed. Also, no two students may analyze the same firm, some firms may not be approved because of public or non-public issues Dr. Sherman is aware of, and/or may not be approved for other reasons Dr. Sherman deems appropriate.

Recommendations:
The following are ideas to help the student select a firm and reduce the stress of this project.

A. Pick a firm you can have fun with. Select a firm that covers an area of interest and something you can work on for the next few months without becoming completely bored with the firm or its business.
B. Read and study the writing guide for this course BEFORE you start writing. The writing guide is on-line and only two pages. Reviewing Strunk and White’s Elements of Style may also help.
C. Visit regularly with Dr. Sherman or the writing center to get ideas on different approaches and research sources you may be able to access.

A form will be distributed in class for you to use to submit your proposed firm. Your completion and submittal of this form is a graded course component.