The Business School expects that you are familiar with the contents of this course outline. You must also be familiar with the Course Outlines Policies webpage which contains key information on:

- Program Learning Goals and Outcomes
- Academic Integrity and Plagiarism
- Student Responsibilities and Conduct
- Special Consideration
- Student Support and Resources

This webpage can be found on the Business School website: 
https://www.business.unsw.edu.au/degrees-courses/course-outlines/policies
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</table>
COURSE-SPECIFIC INFORMATION

1 STAFF CONTACT DETAILS
Lecturer-in-charge: Peter Donnan
Room: School of Management UNSW Business School, Level 5 Business School Building
Phone No: 9385 7175
Email: peter.donnan@unsw.edu.au
Consultation Times – Wednesday 4 – 5.00pm OR by appointment
Tutor names: Peter Donnan

2 COURSE DETAILS

2.1 Teaching Times and Locations
Lectures start in Week 1 (to Week 12): The Time and Location are:
Wednesday 1800-1930 – TETB LG07

Tutorials start in Week 2 (to Week 13). The Groups and Times are:
Wednesday 1930-2100 – Bus 118

2.2 Units of Credit
The course is worth 6 units of credit.
It is expected that you will spend at least 8 - 12 hours per week studying this course. This
time should be made up of reading, research, working on exercises and problems, and
attending classes. In periods where you need to complete assignments or prepare for
examinations, the workload may be greater.

Over-commitment has been a cause of failure for many students. You should take the
required workload into account when planning how to balance study with employment and
other activities.

2.3 Summary of Course
The goal of this subject is to teach you about the strategic management of technology and
innovation from a general manager’s perspective. This subject views technology, broadly
defined, as the process by which an organisation transforms all of its organisational inputs
(i.e., labour, capital, materials, and information) into products and/or services. Innovation is
defined as a significant change in an organisation’s underlying technology. Because
technology is a critical resource for each organisation, it must be managed by the general
manager for comparative advantage. To do so necessitates aligning the technology strategy
with the strategy of the firm.
The subject is organised around three (3) major themes: (1) The strategic management
process; (2) Strategy and competitive advantage in a technology environment; (3) Evaluating
business models and technology strategies.
Attention will be focused upon the major theoretical and empirical contributions to the field
and their implications for practitioners. Experiential work and case studies will be used to
assist you in relating the content material to your own experience and practice.

When you have completed this subject, you will be expected to have:
1) A working understanding of the concepts and techniques of strategy technology
management;
2) An ability to critically analyse the behaviour or organizations and organisational members in developing, implementing, and managing technology from a strategic perspective; and
3) The capacity to critically evaluate the strategic management of technology within diversified companies.

2.4 Course Aims and Relationship to Other Courses
This course aims to integrate and build on the knowledge gained in MGMT5800, and specifically to assist you in thinking about how the separate pieces of and themes on the strategic management of change fit together. At the foundation of this focus is building the skills to develop your ability to make clear judgments about changing, to learn about business risk, and to improve your capacity in making sound business level decisions. In this sense, the course is a natural follow on from MGMT5800, and as such you need to keep the lessons and ideas learned in that course in mind, as the semester progresses.

2.5 Student Learning Outcomes
The Course Learning Outcomes are what you should be able to DO by the end of this course if you participate fully in learning activities and successfully complete the assessment items.

The Learning Outcomes in this course also help you to achieve some of the overall Program Learning Goals and Outcomes for all postgraduate coursework students in the Business School. Program Learning Goals are what we want you to BE or HAVE by the time you successfully complete your degree (e.g. ‘be an effective team player’). You demonstrate this by achieving specific Program Learning Outcomes - what you are able to DO by the end of your degree (e.g. ‘participate collaboratively and responsibly in teams’).

For more information on Program Learning Goals and Outcomes, see the School’s Course Outlines Policies webpage available at https://www.business.unsw.edu.au/degrees-courses/course-outlines/policies
The following table shows how your Course Learning Outcomes relate to the overall Program Learning Goals and Outcomes, and indicates where these are assessed (they may also be developed in tutorials and other activities):

<table>
<thead>
<tr>
<th>Program Learning Goals and Outcomes</th>
<th>Course Learning Outcomes</th>
<th>Course Assessment Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>This course helps you to achieve the following learning goals for all Postgraduate coursework students:</strong></td>
<td><strong>On successful completion of the course, you should be able to:</strong></td>
<td><strong>This learning outcome will be assessed in the following items:</strong></td>
</tr>
<tr>
<td>1 Knowledge</td>
<td>Explain a range of key business strategy and innovation theories and models, including being able to determine which model/theory applies to specific types of companies, economies and industries.</td>
<td>• Seminar Case Studies • CSA Reports • Exam • Short MC In Class Quiz (2)</td>
</tr>
<tr>
<td>2 Critical thinking and problem solving</td>
<td>Use the presented theories and models to interpret, analyse and make recommendations on practical business strategy problems, presented in the assigned Case Studies.</td>
<td>• Seminar Case Studies • CSA Reports • CSAII Review</td>
</tr>
<tr>
<td>3a Written communication</td>
<td>Construct written work which is logically and professionally presented.</td>
<td>• CSA Reports • CSAII Review • Exam Short Essays</td>
</tr>
<tr>
<td>3b Oral communication</td>
<td>Communicate ideas in a succinct and clear manner.</td>
<td>• Seminar participation • CSA Verbal presentations</td>
</tr>
<tr>
<td>4 Teamwork</td>
<td>Work collaboratively to complete a task.</td>
<td>• Seminar participation • CSA Reports and Presentations</td>
</tr>
<tr>
<td>5a. Ethical, social and environmental responsibility</td>
<td>Identify and assess environmental and sustainability considerations in problems in international macroeconomics.</td>
<td>• Seminar Participation • CSAII Review</td>
</tr>
<tr>
<td>5b. Social and cultural awareness</td>
<td>Identify and assess these factors and include in solutions developed.</td>
<td>• Seminar Participation • CSA Reports and Presentations • CSAII Review</td>
</tr>
</tbody>
</table>

3 LEARNING AND TEACHING ACTIVITIES

3.1 Approach to Learning and Teaching in the Course

This course is taught as an applied, graduate level strategy activity. The academic team teach it as a means for you to develop on embedded or already embedded critical thinking and application skills that your degree has already imbued you with. Consequently, the primary approach to teaching is one of independent learning alongside academic rigor and application. Its separate teaching parts (lecture and seminar) along with its assessment tasks
specifically orient you to draw on your personal or work experiences and to then align these with the lessons learned. For instance, rather than simply encourage you to read articles or case studies and then to discuss these broadly, you will need to leverage the CASE application that you have learned in MGMT5800 and develop your application and thinking. We do this by developing your critical insights so that you can problem solve, argue solutions, and convince colleagues or combatants. In this regard, the separate parts of the course are meant to give you solid, transportable analytical skills that will stay with you for the duration of your career.

The course is therefore taught (1) with an expectation that you are open to learning, (2) that you are willing to be challenged, and (3) that you are enthusiastic about participating. In order to benefit from the course as fully as possible, you will need to embrace an understanding of these three items. The best way to prepare for this approach is to
- Come to both lectures and seminars prepared to participate
- Be involved – challenge, argue, agree, and discuss
- Read and think about items outside of core class materials
- Be willing to challenge your preconceived beliefs
- Consider the course in the broader scheme of your career

This approach will enable you to benefit from the academic teaching team’s experience and approach, as well as facilitating your analytical and applied development.

3.2 Learning Activities and Teaching Strategies
As indicated above (3.1), learning in the course occurs across two platforms – a lecture and a seminar. The two are integrated and so you need to attend both to benefit from the planned learning outcomes (apart from each connected to your assessment). Each is related insofar as the lecture provides an intellectual and academic foundation, while the seminar is the place for application and applied, critical thinking, as you integrated lecture content. At times, you may wonder what the overlap is, yet the connection is embedded rather than explicit. On a week to week basis, each learning activity will direct you in this regard (e.g., lecture content in weeks 2, 3, and 4 play a central role in your ability to provide depth to the way you construct a developed case application in week 5 and 6). With a focus on your career and the requisite skills for your career, you will need to work in teams for your case analysis and for at least one assignment. Outside of class time, however, and to facilitate your learning (and its retention), it is expected that you work independently on tasks such as reading or initial problem solving for cases or applications. It is anticipated that after your independent work, you will come together as a team to work on your CASE or on the exercise for your seminar. Either way, allocating time to think and to prepare for lectures, debates, and seminars is essential.

4 ASSESSMENT

4.1 Formal Requirements
In order to pass this course, you must:
- achieve a composite mark of at least 50;
- make a satisfactory attempt at all assessment tasks (see below);

4.2 Assessment Details

<table>
<thead>
<tr>
<th>Assessment Task</th>
<th>Weighting</th>
<th>Length</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examination (Multiple choice &amp; short answers)</td>
<td>18%</td>
<td>1.5 hours</td>
<td>As scheduled during your lecture in Week 12.</td>
</tr>
</tbody>
</table>
You have two major cases to complete for assessment purposes. In each case, the basic questions are essentially the same:

1. What are the real issues the organization needs to address?
2. What alternatives does the organization have in tackling these issues, and which alternative makes most sense?
3. What specific action plan would you recommend?

It is for you to identify the specific issues posed by the case and to decide how they can best be addressed.

**Final Examination - In Class: Week 12 - 18% of your Total Mark**

The Final Examination will consist of multiple choice questions as well as short-answer questions drawn from your assigned readings, case studies, lectures, and seminars. The exam is designed to test your understanding of the theory and empirical research relevant to the strategic management process.

The Examination will take place during your lecture timeslot in Week 12. The duration of The Exam will be 90 minutes.

Details of the possible examination topics will be discussed in lectures. You are allowed to bring one (1) A4 - sized piece of paper with study notes on it (double-sided, typed using any size font or hand-written) into the Examination. It is suggested that students make summary notes of each reading to aid in the development of this sheet.

**Assignment 1 (Group): Case Study Analysis I (CSAI): Week 8 – 25% of your Total Mark**

Group Report and Presentation Due Week 8 in your Seminar

The assigned Case Study to be analysed will be either a Harvard Business School case or one selected from your text, it will be announced in your assigned Seminar in Week 5.
The Case Study Analysis is designed to enable you to apply the theory and empirical research discussed in the subject to real-world situations. Related goals include the development of skills in teamwork, intra-group dynamics, organisational analysis, project management, and professional report writing (i.e., proper layout, grammar, spelling, etc.). In order to assist you in developing the practical skills needed for successful completion of this assignment, a portion of seminar time will be devoted to relevant learning and training.

Specifically, you are required to:

a. Organise yourselves into teams of 6 people (exceptions to this guideline can only be made by the express permission of the seminar leader in your nominated seminar). In order to facilitate effective group development, group members must be from the same nominated seminar.

b. Analyse the Case Study utilising the C.A.S.E. method (C is for Challenge, A is for Analysis, S is for Solution, and E is for Execution). This case analysis technique will be introduced to you in your seminar in Week 2.

c. Submit your Case Study Analysis written report to your seminar leader at the designated time (late case study analyses will have their marks reduced per the university guidelines) and place (see Assessment Summary in this document). The Case Study Analysis is to be a maximum of 4 (four) double-spaced pages including any references and appendix (but not including the cover page). The cover page must be the official School of O&M "Essay/Assignment Cover Sheet." The cover page must be stapled to the Case Study Analysis and must contain the following information: a) the complete names of the students who prepared the analysis, b) their respective student identification numbers, c) the subject name, d) the name of your Lecturer, e) the name of your Seminar leader, f) the day, time, and classroom of your seminar, and g) the date submitted. All team members must sign the cover sheet acknowledging that the case analysis has not been submitted in any other subject. The Case Study Analysis must be typewritten in a 12 point font, be double-spaced only, and have 3 cm margins on the left and right. The Case Study is meant to be self-contained so do not use any information about the organisation or the competitive environment that is found outside the case (i.e., websites, company brochures, newspaper or magazine articles, etc.). Each section of the Case Study Analysis (i.e., Challenge, Analysis, Solution, Execution) is worth 20% each. The final 20% of the Case Study Analysis is for Style (i.e., spelling, grammar, sentence construction, format, etc. of the written Case Study Analysis). This task, the CSAI Written Report is worth 18% of your total mark.

d. Oral Presentation: In addition, you will need to prepare an Executive Summary Presentation of your key findings for CSA I and deliver it in your seminar. This is a concise summary of your findings. It is an audio (i.e., verbal) and visual (i.e., use of a combination of PowerPoint and/or handouts) presentation made to the Seminar by the entire team. This presentation must be made in 12 minutes or less. All members of the group must verbally participate in the presentation. This task, your personal verbal presentation, is worth 7% of your total mark.

Assignment 2 (Group): Case Study Analysis II (CSAII): Week 13 – 30% of your Total Mark

Group Report and Presentation Due Week 13 in your Seminar

The assigned Case Study to be analysed will be either a Harvard Business School case or one selected from your text, it will be announced in your assigned Seminar in Week 10. The requirements for this case study analysis are the same as those for Case Study Analysis
Case Study Analysis written report – **this task is worth 20% of your final mark.**

Oral Presentation: An **Executive Summary Presentation** of your key findings for CSA I and deliver it in your seminar. For this task, you will need to prepare a **1-Page Butcher paper** presentation and talk to this 1-page. You will need to present a concise summary of your solution and execution in particular and prepare for a workshop style session. The presentation made to the Seminar by the entire team. This presentation must be made in 10 minutes or less, and all members of the group must verbally participate in the presentation. This task, your personal verbal presentation, is worth 10% of your total mark.

**Assignment 3 (Individual): CSAII Review - 15% of your Total Mark**

**Individual Report due – Friday 27 October**

As an Individual Assessment Exercise, you will need to prepare and submit a short **CSAII Review** assessment or observation paper. This assignment will be an individual report where you consider or analyse the impact of the presentation made by your group in the seminar and the questions asked by other groups.

For the review, considering the presentations that other teams made in your seminar, you need to

- Assess whether the solution your team presented is still the best solution in your view, and justify why you believe so, OR
- Modify (or adjust) the solution your team presented and state why you have made this change

Please do not simply reproduce parts of the CSAII Group Report. This individual assessment review must reflect **your own opinion**. Given its content, it must be done AFTER the CSAII seminar presentation and discussion, and is **due on Friday 27 October**.

This assessment is a written report with a minimum of 1,000 words and a maximum of 1,200 words and as with your CSA, typewritten in a **12 point font, double-spaced**, with 3 cm margins. It must be submitted in Word format. **This task, your personal written CSAII Review Report is worth 15% of your total mark.**

**Assessment: Seminar Preparation and Participation – 12% of your total mark**

Preparation for, and active participation in, your seminars is a key component of the learning of this subject. The seminars will primarily focus on experiential learning via the case study method. To that end, you will be introduced to a number of topics that will facilitate the earning of your Case Study Analyses marks. These topics will include: the C.A.S.E. method (which is an acronym for Challenge, Alternatives, Solution, and Execution), peer evaluation, intra-group dynamics, report writing, and report presentation.

To help extrinsically motivate you to prepare and actively participate in seminars, peer evaluations will be utilised in the CSAs. The use of peer evaluations will serve as a diagnostic tool for the analysis of intra-group dynamics.

In **Class Evaluation**: Class sessions will usually begin with a short oral presentation by one or two student teams – “consulting teams” – presenting to the class as if we were the client in the case. Your career success depends critically on your skill in articulating and defending your ideas and engaging a productive dialogue with your colleagues. You should consider our classroom as a laboratory in which you can test and improve these skills. Class participation grades will be determined based on your contribution to class discussion of case studies. Attendance is a necessary but not sufficient condition for a good participation grade.
You are expected to be an active participant. Just like in a real work setting, your contributions in discussions are a key part of your performance. At the end of each case discussion session, scores will be assigned to each student on the following scale:

1. **Excellent Participation**: comments that challenge constructively the direction of the discussion and reorient it in a productive way.
2. **Good Participation**: comments that clarify complex issues, synthesize material, and move the discussion forward noticeably.
3. **Modest Participation**: comments that are marginal but help flesh out a given part of the discussion or analysis.
4. **Poor Participation**: few comments or interactions and little contribution made to discussion or analysis.

Some of the criteria that make for effective class participation include:

- **Involvement**:
  - Are you following the discussion attentively?
  - Are you actively contributing ideas?
  - Are you respectful of others in how you formulate your contributions?

- **Listening**:
  - Are you a good listener? Are your points relevant to the flow of the discussion?
  - Do you link them to the comments made by others?

- **Adding value**:
  - Do your comments show evidence of insightful analysis of the case data?
  - Do they make use of relevant practical experience?
  - Are they formulated in a succinct, effective manner?
  - Do your comments clarify and highlight the important aspects of earlier ideas and lead to a clearer statement of the relevant concepts and issues?

- **Risk-taking**:
  - Are you willing to test new ideas, or are all your comments “safe”? (For example, repeating case facts without analyses and conclusions, or simply generic statements that would be true in almost any setting would be considered “safe” and not very useful.)

**This is an ongoing assessment commencing in Week 1 and concluding in Week 12.**

There will also be 2 (two) brief **MC In Class Quizzes** to be undertaken during the semester. **Your Preparation for and Participation in Seminars is worth 12% of your total mark.**

4.3 **Assignment Submission Procedure**

Both CSAs need to be submitted directly to the Lecturer-in-Charge – in electronic copy and hard copy, as well as via Turnitin. Only one team member needs to tender the Group assignments, with a signed cover page attached (you need to download this from Moodle). Assignments will need to be submitted through Turnitin via Moodle.

The CSAII Review also needs to be submitted directly to the Lecturer-in-Charge Facilitator – in electronic copy, Word format. **These are submitted by each individual and must include your name and student ID.**

4.4 **Special Consideration, Late Submission and Penalties**

Late submission of assignments must be preceded by a written application for an extension based on medical reasons or similar, submitted before the due date of the relevant item. Penalties for late submission apply. To avoid late penalties, note the dates of due work in your diary, start thinking about CSAI and II early, and plan your work for the session.
If you are having difficulties meeting the requirements of the subject, please contact the lecturer-in-charge as soon as possible.

The **penalty** for unauthorised **late submission** shall be:

a) Five (5) percent per working day of the gross mark
b) No paper will be accepted after the elapse of ten (10) working days from the due date for the relevant assignment.

For information on Special Consideration please refer to the Business School's Course Outlines Policies webpage.

**Quality Assurance**
The Business School is actively monitoring student learning and quality of the student experience in all its programs. A random selection of completed assessment tasks may be used for quality assurance, such as to determine the extent to which program learning goals are being achieved. The information is required for accreditation purposes, and aggregated findings will be used to inform changes aimed at improving the quality of Business School programs. All material used for such processes will be treated as confidential.

5 COURSE RESOURCES

**Textbook:**

Additional weekly readings will be provided in Moodle. The website for this course is on Moodle at: [http://moodle.telt.unsw.edu.au](http://moodle.telt.unsw.edu.au)

**Note on Additional Readings and Lecture Material:**
From week to week there will be additional readings posted on Moodle and discussed in lectures. Often these additional readings are 'of interest' and while they are not compulsory to read you would benefit from doing so. In other weeks, you will be required to read those additional materials. You will be informed when this is the case.

**Additional Reference Material**
No text and/or group of selected readings could encompass all of the relevant theory and research surrounding technology and innovation. Students are encouraged to investigate additional books and periodicals (both practitioner as well as academic journals) in their exploration of this subject. It is therefore important to read, to think and to explore around the prescribed text/readings and to monitor relevant periodicals, especially if you intend to develop a specialisation in this area. The following list contains a number of relevant journals:

*Technological Forecasting and Social Change*
*Academy of Management Journal*
*Technology and Learning*
*Academy of Management Review*
*Technology Analysis and Strategic Management*
*Administrative Science Quarterly*
*Technology and Culture*
*Technology in Society*
*California Management Review*
Technology Review: MIT's Magazine of Innovation
Harvard Business Review
Innovation Research on Technological Innovation, Management
Journal of Management
Journal of Management Studies
Strategic Management Journal
Journal of Occupational and Organizational Psychology
Strategy and Leadership
Journal of Organizational Behavior
Sloan Management Review
Management Science
Leadership Quarterly
Organisational Dynamics
Organization Science
Organization Studies
Research in Organizational Behavior
6 COURSE EVALUATION AND DEVELOPMENT

Each year feedback is sought from students and other stakeholders about the courses offered in the School and continual improvements are made based on this feedback. UNSW's myExperience survey is one of the ways in which student evaluative feedback is gathered. In this course, we will seek your feedback through end of semester myExperience responses.

Feedback from previous students indicated that the course should be practical and hands on, and that it should have more individual-based assessment. As a result of this feedback, the structure of the course has been changed in 2015, 2016 and 2017 to reflect these suggestions.

7 COURSE SCHEDULE

<table>
<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>Readings for Lecture</th>
<th>Readings for Seminar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>• Overview: Strategy and Why is it Important</td>
<td>• Thompson et al, Chapter 1</td>
<td></td>
</tr>
<tr>
<td>26 July</td>
<td></td>
<td>• Harvard Business Review – “The Secrets to Successful Strategy Execution” (on Moodle)</td>
<td></td>
</tr>
<tr>
<td>Week 2</td>
<td>• Establishing Company Direction</td>
<td>• Thompson et al, Chapters 2 &amp; 3;</td>
<td>• Read: A guide to Case Analysis (on Moodle)</td>
</tr>
<tr>
<td>2 August</td>
<td></td>
<td>• Porter “What is Strategy” (on Moodle)</td>
<td>• Review of CASE Analysis</td>
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<td></td>
<td></td>
<td></td>
<td>• Begin Forming Teams</td>
</tr>
<tr>
<td>Week 3</td>
<td>• Evaluating Company Resources and Competitive Position</td>
<td>• Thompson et al., Chapters 4 &amp; 5</td>
<td>• HBR Case: BCPC internet strategy team: An exercise (Confirm Teams)</td>
</tr>
<tr>
<td>9 August</td>
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<tr>
<td>Week 4</td>
<td>• Mastering Marketing Principles</td>
<td>• Silberger, 2012. The Ten Day MBA: Chapter 1: Marketing (Moodle)</td>
<td>• Text Case: To be announced in Lecture &amp; On Moodle</td>
</tr>
<tr>
<td>16 August</td>
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<tr>
<td>Week 5</td>
<td>• Mastering Financial Statements</td>
<td>• Carson E; Trotman K; Gibbins M, 2012, Financial Accounting: An Integrated Approach, 5th edition, Chapter 2: “Measuring and evaluating financial position” (Moodle)</td>
<td>• Text, Case - TBA CSAl case announced this week</td>
</tr>
<tr>
<td>23 August</td>
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</tbody>
</table>
| Week 6  
30 August | • Strengthening a Company's Competitive Position  
• Competing in International Markets | • Thompson et al., Chapter 6  
• Thompson et al., Chapter 7 | • Text, Case - TBA |
| --- | --- | --- | --- |
| Week 7  
6 September | • Diversification: Strategies for Managing a Group of Businesses | • Thompson et al., Chapter 8 | • Text, Case – TBA or CSAII draft work |
| Week 8  
13 September | • Strategy Execution: Building Capability | • Thompson et al., Chapter 10 | Case Study Analysis I is due at the beginning of your nominated seminar  
Presentations in class |
| Week 9  
20 September | • Corporate Culture and Leadership | • Thompson et al., Chapter 12 | • Text, Case |
| Mid-semester break: 22 September | Mid Semester Break | No Lecture | No Seminar |
| Week 10  
4 October | • Actions that promote Good Strategy Execution – Managing Internal Operations | • Thompson et al., Chapter 11 | • Text, Case – TBA  
CSAII case announced this week |
| Week 11  
11 October | • Ethics, Corporate Social Responsibility, and the Role of Strategy | • Thompson et al., Chapter 9 | • Text, Case – TBA  
or Rapid Case or CSAII Draft Review |
| Week 12  
18 October | FINAL EXAM during Lecture Time | CSAII Draft Review | CSAII Draft Review |
| Week 13  
25 October | CSAII Presentation Case Study Analysis II is due at the beginning of your seminar | CSAII Review - submit by 27 October | --- |
8 APPENDIX: GUIDELINES FOR CASE ANALYSIS SEMINAR PRESENTATIONS

Context: Think of your seminar presentations as consultant reports. Imagine that you have been given a chance to study the focal organization and to come up with a diagnosis and a set of recommendations.

- Make sure you explicitly identify a specific client, since your action recommendations will need to be ones that this client can implement.
- In this course, you have some latitude in choosing your client: even if the case is written from the point of view of a given firm, you might choose to take as your client one of its stakeholders. However, in choosing your client, make sure the case and associated readings provide you with enough material.
- The issues to be resolved may not be obvious; but this is also true of many real-world situations. The case questions posed by your Lecturer/Seminar Leader are offered only to get your thinking going - they are not an agenda for your analysis.

Presentation: You will make this presentation to the class, but you should think of the class as if we were the client and his/her leadership team. Keep in mind, however, that representatives of other stakeholder groups may attend! Therefore, in making this presentation, you should not waste time repeating the case facts that would be known to this audience.

In real engagements, you might review these case facts to establish common ground and to buttress your credibility; but in class, that won’t be necessary.

Your presentations should include the following elements:

1. **First**, one of the most challenging parts of familiarizing yourself with CASE is succinctly summarizing (a) the challenge facing the client organization, (b) the root issue that makes it difficult to meet this challenge successfully, and (c) your key recommendation for resolving this root issue.
   Imagine that your client has to cut short the meeting due to an emergency: you will want one slide or synopsis on which to summarize your “take away” message - this is it. Such a summary is very hard to do; but it will force you to distil your analysis, and that will help you prioritize and shape the rest of the presentation.

2. **Second**, you should lay out an overview of your presentation - the agenda. This slide should tell us what areas you will address in what order. It will be much more impactful if simultaneously you can summarize in a short phrase the key lesson of each of these parts of the presentation. In this way, it can lay out in skeleton form the substantive logic of your argument.

3. **Third**, comes the body of the report. Here you should start by identifying the key challenge facing the client. The challenge is the problem to be revolved. It is the starting point for your analysis, so it is important that you state the challenge in a way that your client will immediately recognize as
an accurate statement of the problem at hand. Your statement of the challenge creates a “shared context” with your audience.

**Process:** Having identified the challenge, your next task is to “peel the onion” to identify the root issue facing the client. The root issue is the factor that makes it difficult for the organization to resolve its challenge successfully. Think of your task here as akin to a physician’s: the patient (client) comes in with a whole set of “presenting symptoms” i.e. challenges - it’s your job to identify the underlying disease i.e. root issue. As with a doctor, a good root issue analysis yields insight that is actionable: being actionable (implementing definable, visible and effective actions) is crucial, since the rest of your presentation is going to focus on resolving this root issue.

Note that organizations usually face multiple challenges, and for any one of these, there may be more than one root issue. But you simply don’t have time to address more than one challenge and one root issue in a short presentation. The burden is on you to add as much value as possible for client by identifying the most critical challenge and the highest leverage root issue.

Identifying a root issue is often difficult - but it is immensely valuable for your client. In real life, it’s often much more valuable to your colleagues and clients to identify the right question than to find the right answer. **Your diagnosis of this root issue should be argued, not just asserted, using the relevant facts of the case and whatever analytic tools seem necessary.**

Note too that sometimes the client has a strong opinion as to the nature of their real problem, and that this opinion may be reflected in the case, but you may think their analysis is not accurate. In this situation, you have to convince them that the real problem lies elsewhere. And sometimes the case describes a situation without explicitly identifying any specific challenges at all, perhaps because the client organization is doing very well - in which case, your task will be to identify the deep source of their success and a key source of vulnerability in the future, and what they could do about that.

Finally, note that in cases such as these ones we study in this course, there are typically multiple internal and external stakeholders in your client’s decision making, and these stakeholders have different interests, rights, and concerns. Stakeholders are any groups affected by the issue. Some stakeholders may not be obvious at first sight - they may be far “downstream” or far “upstream.”

You need to ask yourself: Who are the parties affected here? What rights or interests or concerns of theirs are involved? What is the nature of the client organization’s economic and political relations to these stakeholders? Somewhere in the course of your presentation, you will need to consider these stakeholders.
You should fold that discussion into your presentation wherever it adds most value for your client: this may turn out to be in your characterization of the challenge; it may be in defending your characterization of the root issue; it may in identifying and assessing your options; or it may be in planning your implementation plan. But it should contribute something to your analysis somewhere.

After defining the Challenge and Root issue, you need next to identify the Strategic Options that can plausibly address the root issue facing the client organization and thereby help it meet its challenge. You should make a clear distinction between these options and an implementation plan: the options specify various possible compass headings - the general directions the client might go to solve their problem - whereas the implementation plan specifies a detailed itinerary for one of these options (see below).

The analysis supporting your strategic recommendation must convince the client. The key to convincing the client is to recognize that there are lots of points of view in the client organization (and in the class) on how to solve their problem: your job is to convince us that your analysis is more plausible than the alternatives and that your recommended strategy is more likely to achieve success. The best way to do this is as follows:

- To begin, you should identify two or three fundamentally different, mutually exclusive, plausible options for tackling the client’s problems. In practice, you would want to make sure that your list of alternatives includes the ones likely to be under discussion within the client organization: by explicitly addressing these options, you will be helping your client reach a reasoned consensus. **To be clear: you are looking for mutually exclusive alternatives here, not variants of the same basic idea.**

- Then you need to identify a common set of criteria against which to evaluate the options. A broad range of strategic and operational factors are potentially relevant, but it is up to you to come up with a small set of key criteria. You should justify this choice of criteria: you can often do that by referring to the priorities implied by the organization’s basic mission and business strategy. You should propose a set of weights (most and least critical) for these criteria according to their relative importance in the priorities of the organization.

You should take each criterion one at a time, and show how your options compare on that criterion. Having identified each option’s pros and cons on this criterion, you should be able to score the options relative to each other.

Having described and justified the main “compass heading” you are recommending, you can move the implementation plan.

The first step in developing and explaining your implementation plan is to identify the hurdles and risks that your strategy is likely to encounter, and then your
implementation plan will be a detailed “itinerary” that will enable your client to implement your recommended strategy in the face of these hurdles and risks.

Depending on the case, you may not have enough data to develop this part of your presentation in any great detail, but the following needs to be done in this section.

- You should **identify the likely hurdles** that would face your client in pursuing your proposed strategy, and suggest some counter-measures your client could use to overcome these hurdles.
- You should also **identify the risks confronting your strategy** - then show the counter-measures that could mitigate these risks, and if they can’t be mitigated, how the client should proceed if these risks do materialize.
- Synthesizing this analysis of hurdles and risks and their respective counter-measures, you can **propose a sequenced implementation plan (Execution Plan)**, answering the questions: what are the key steps to be done today, next week, next month, next quarter, and next year - and who should be responsible for these activities. This plan will be far more useful if you support it with some reasoning (i.e. explain why you recommend this sequencing and timing rather than another).