

**SUMMER Q2 2023**

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| <b>Meeting days:</b> Tuesday & Thursday                        | <b>Instructor title and name:</b> Dr. Julia Dare   |
| <b>Meeting times:</b> 9:30AM-12:15PM                           | <b>Phone:</b> 619-849-2397 (please email messages) |
| <b>Meeting location:</b> Mission Valley Campus, 316            | <b>E-mail:</b> jdare1@pointloma.edu                |
| <b>Final Exam:</b> N/A   | <b>Office location and hours:</b> By appointment   |
| <b>Additional info:</b> Class is in person; not offered online |  |

**PLNU Mission**

**To Teach ~ To Shape ~ To Send**

Point Loma Nazarene University exists to provide higher education in a vital Christian community where minds are engaged and challenged, character is modeled and formed, and service is an expression of faith. Being of Wesleyan heritage, we strive to be a learning community where grace is foundational, truth is pursued, and holiness is a way of life.

**Fermanian School of Business Mission**

**Character ~ Professionalism ~ Excellence ~ Relationships ~ Commitment ~ Innovation**

To provide high quality business programs that equip students to make a positive impact in their workplace and community by connecting purpose to practice.

**COURSE DESCRIPTION**

This capstone course focuses on a thorough understanding of the analytical techniques and skills necessary to identify, develop, and implement successful business strategies. Utilizing an intensive case-study approach, students demonstrate an understanding of the main elements of the strategic management process, including a semester-long detailed strategic plan analysis of an existing corporation. In addition, the course integrates knowledge and skills students have mastered in previous courses.

**COURSE LEARNING OUTCOMES**

Upon completion of this course, students will be able to:

1. Analyze and evaluate the strategies of an organization by integrating appropriate insights from the core business disciplines (PLO 1, 2 & 3).
2. Formulate a strategy for an organization considering strategic options, assessment of alternatives, and emerging market conditions (PLO 2 & 3).
3. Present the results of a strategic evaluation in a professional and concise manner (PLO 6).
4. Construct strategies and structures that reflect ethical principles, company values, and socially responsible management practices (PLO 5).
5. Collaborate effectively in a team to analyze current challenges in business (PLO 7).

## REQUIRED TEXTS AND RECOMMENDED STUDY RESOURCES

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REQUIRED: Gamble, Peteraf & Thompson. *Essentials of Strategic Management: The Quest for Competitive Advantage*, 7<sup>th</sup> edition, 2020, McGraw-Hill Education. ISBN: 978-1260261547

## ASSESSMENT AND GRADING

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To successfully pass the course, students should attend all class sessions, participate in class activities, complete exams as scheduled, and turn in assignments on time. Your course grade consists of 60% individual work and 40% group work as follows out of 1000 points.

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|--|-----|
| A. Prerequisite Course Leveling Module (Individual)            | 50  |
| B. Chapter Quizzes (6) (Individual)                            | 120 |
| C. Case Studies (4) & Case Presentation (Group)                | 160 |
| D. Article Assessment - Flawed Business Strategy (Individual)  | 100 |
| E. Company Strategy Analysis & Presentation (Group)            | 260 |
| F. Company Strategy Analysis: Investor Assignment (Individual) | 30  |
| G. Independent Industry Predictions Paper (Individual)         | 110 |
| H. Participation (Individual)                                  | 170 |

The following represents the general grading policy for this class.

|            |    |            |    |
|------------|----|------------|----|
| 93 – 100%  | A  | 73 – 76.9% | C  |
| 90 – 92.9% | A- | 70 – 72.9% | C- |
| 87 – 89.9% | B+ | 67 – 69.9% | D+ |
| 83 – 86.9% | B  | 63 – 66.9% | D  |
| 80 – 82.9% | B- | 60 – 62.9% | D- |
| 77 – 79.9% | C+ | 0 – 59.9%  | F  |

### **A. Foundations of Business Integration and Strategic Management Pre-Requisite Leveling Module (50 points)**

You are required to take the Foundations of Business Integration and Strategic Management course pre-requisite leveling module. The time to complete the module is estimated at 6 to 9 hours, depending on your previous exposure to the subject.

An MBA program staff member has sent registration and completion instructions to your PLNU e-mail. If you have not received these instructions, please notify the professor immediately to avoid late completion penalties. To successfully complete the module, you must earn a minimum score of 80% on the module post-test. You are allowed to attempt the post-test twice. If you have not achieved a passing score (80%) after two attempts, you will be required to purchase a new module for \$39.00, and continue attempts until a passing score is achieved at the same URL:

<https://micro.peregrineacademics.com/pointloma>

The password for the retake module is: **PLNUPAY-1001**

**If you take any modules that are not assigned to you for this course, you will be billed for each module at \$39 each.**

This module is worth 5% of your total course grade. Extra credit is available if you complete the module early. Similarly, earned credit will be reduced according to the timeline given in the table below:

| Date       | % Grade Earned | Incentive          |
|------------|----------------|--------------------|
| 6/25       | 7%             | Early Reward       |
| 7/2        | 6%             | Early Reward       |
| <b>7/9</b> | <b>5%</b>      | <b>Full Credit</b> |
| 7/16       | 3%             | Late Penalty       |

Note: If the course pre-requisite module has not been completed with a score of 80% or higher by **7/16**, the student will be dropped from the class. Students may receive only a partial refund in accordance with the PLNU refund policy outlined in the catalog.

The percentage earned on the leveling module post-test will be translated into points in conjunction with the extra credit and late penalty percentages as specified in the table below:

**SAMPLE TABLE**

*Based off 5% of course being equivalent to 50 points – adjust as needed based on actual points, etc. It is up to the faculty member as to how many points equates to 5% of the total course grade; however, this must represent 5% of the total grade.*

| Post-test Percentage | Points Earned if completed by 6/25 | Points Earned if completed by 7/2 | Points Earned if completed by 7/9 | Points Earned if completed by 7/16 |
|----------------------|------------------------------------|-----------------------------------|-----------------------------------|------------------------------------|
| 95.00-100            | 70                                 | 60                                | 50                                | 30                                 |
| 90.00-94.99          | 63                                 | 54                                | 45                                | 27                                 |
| 85.00-89.99          | 56                                 | 48                                | 40                                | 24                                 |
| 80.00-84.99          | 49                                 | 42                                | 35                                | 21                                 |
| <80.00               | 0                                  | 0                                 | 0                                 | 0                                  |

**B. Chapter Quizzes (120 points)**

Reading the textbook chapters prior to class discussions is critical for your understanding of the concepts and engagement in class discussion. To assess your comprehension, six (6) multiple choice Chapter Quizzes will be given. You may submit one extra credit assignment (to be announced by the instructor) to replace your lowest Chapter Quiz grade with an A+. Quizzes will only be given via Canvas on Honorlock. You must use a device that supports this testing environment.

**C. Case Studies (160 points)**

Case Study Summaries for each assigned case are to be prepared based upon questions provided by the instructor. The specific case assignments and focus questions will be posted via Canvas. Each summary is due before class begins on the date the case is assigned (see the course schedule). Case Study Summaries are to be 3-4 pages in length, excluding cover page (APA format). Late case summaries will not be accepted as we will discuss all cases in class the day Case Study Summaries are due. Case Study Summaries will be completed in groups as instructed and approved by the instructor. A thorough reading and analysis of each case is required to prepare the Case Study Summaries and to prepare you for your required contribution to case discussions that will occur for each case during class.

Your group will be assigned one case to act as consultants, leading the in class discussion on the scheduled date. Your assigned case will require greater analytical depth beyond answering the focus questions. In

addition to identifying and analyzing the key issues, your group will pose insightful questions to the class based on your independent study as business consultants. In leading the class discussion, encourage different ideas and analytical thought so that the class develops and tests multiple strategies through a rich and challenging discussion. At the end of the class discussion, your group will be responsible for announcing and defending your recommended strategy. Time for each case presentation is 25 - 35 minutes, which includes class discussion/Q&A.

Each of your group's 4 case summaries are weighted 3% of your course grade (12% total). Your group's assigned case presentation is worth 4% of your course grade (evaluated using the posted rubric). Your participation in case study discussions will impact your Participation grade.

#### **D. Article Assessment - Flawed Business Strategy (100 points).**

You are to select one article from the Wall Street Journal, Forbes, or another major publication discussing some aspect of corporate strategy. The article must be current; articles more than 6 weeks old are off limits. You must find an article discussing a business strategy which you believe is flawed. The article must relate some aspect of our course (e.g., competitive rivalry, alliances, ethics, etc.) to the focal company. To perform an assessment and prepare for questions you will need to conduct additional research on historical stock performance, the market and competition, international forces, etc. You will prepare a presentation summarizing the article, a well developed analysis of the issue facing the company including why the company's current strategy is flawed & why you believe the company is pursuing the strategy, as well as your proposed solution. I will ask for a few articles to be orally summarized and assessed during each class. Presentations should run 9 - 10 minutes, plus Q&A if time permits. At the beginning of the semester, you will be assigned a date to present your article. You will turn in your slides (including a set of back-up slides) and a copy of the article on your scheduled dates. Remember, all presentations are in business dress. To receive full credit, you must complete all requirements of the assignment.

#### **E. Company Strategy Analysis & Presentation (260 points)**

Each group will select a publicly traded company to study and analyze their central strategic issues throughout the course, culminating in a final project presentation in class. Firms in industries that are in transition or firms that are undergoing major strategic changes are potentially the most interesting.

**4 Part Analysis (140 points).** Your group will conduct a comprehensive analysis of the (1) company history and overview, (2) external environment (environment, industry, competition) (3) market and value creation, and (4) financial analysis. Each of the 4 parts must be submitted to Canvas on the due date listed in the course schedule and is 3.5% of your course grade (14% total).

**Presentation (110 points).** After developing and refining the 4 part analysis, a tradeoff analysis of 2 - 3 mutually exclusive strategic alternatives (i.e., choosing one bars the company from choosing the others), a robust and viable strategic proposal for the company (supported by convincing evidence and logic), and execution plan will complete your final presentation. Your final strategy will be based on the strategic problems facing the managers, your analysis of both non-financial and financial/quantitative data (using graphs and charts), a tradeoff analysis of alternative courses of action, and your assessment of the preferred course. A significant set of backup slides are essential to your final presentation (details to be provided in class). Presentations are scheduled in one of the final class sessions. Each team will have 30 - 35 minutes to present, including Q&A. All team members must be present to earn credit and dressed in business attire. Further instructions, as well as the due date/time for each part will be posted on Canvas.

**Project Proposal (10 points).** Your project proposal must be turned in by the due date; however, you have a better chance of approval by turning it in sooner, as companies will be on a first-come, first-served basis. I will approve your group's selected company after receiving a suitable project proposal.

The proposal will include:

1. Names of all team members;

2. A brief description (250 - 500 words) of the central strategic issue you will study, covering the industry and company; and
3. Multiple data sources you've identified to facilitate qualitative and quantitative analysis, including one or more sources from the library research workshop.

#### **F. Company Strategy Analysis: Investor Assignment (30 points)**

Each of you will be assigned to challenge a specific CSA, in the role of an investor. Prior to the presentation, you will acquire a foundational understanding of the company you will be challenging, including a review of relevant industry and company news. You will prepare a set of questions you would like the management team to address in making your investment decision. At the end of the CSA presentation, you will write up your investment decision with sound rationale (see example below). You will announce your decision to the management team. By 5pm the day after class, you will submit all questions you prepared and asked the presenting team, your evaluation of the group's performance (see Canvas for details), and an explanation of your decision to buy or sell the company's stock based on the group's comprehensive analysis and proposed strategy/execution plan.

Investors will be evaluated on the depth and relevance of your questions asked during the presentation, the insightfulness of your evaluation, and the soundness of your rationale to buy/sell the company's stock.

All students have the opportunity to ask questions during any and all presentations. Further instructions, as well as the due date/time will be posted via Canvas.

Investment Rationale Example: Decision to Sell

1. The stock, which was as high as \$50 this year, took a big drop to as low as \$34. The decline came after the company cut its sales and profit forecast for this year, citing the risk of falling sales in Russia due to mounting tensions with the West over Ukraine. Nearly 10% of revenue is earned in Russia.
2. Management estimates that its sales will grow at a "mid-single-digit" rate, down from a "high-single-digit" rate.
3. The company operates in a highly competitive market. For the first time, it has dropped to the #3 spot in the US, behind Nike and Under Armour. Management will attempt to boost its marketing spending to regain market share, but the effect is uncertain & can easily be copied. No long-term strategy is planned.

#### **G. Independent Industry Predictions Paper (110 points)**

Given each group's final Company Strategy Analysis, each team member will independently (1) summarize and justify the team's strategic recommendations; (2) make at least 4 predictions as to the outlook for the industry as a whole in the next 3 years (e.g., which firms will be the winners and losers and why, competitive moves/disruption, M&A/alliances, stock price predictions, etc.) based on strong evidence and analysis from marketing, finance, and strategy; and 3) identify & develop critical changes needed to the recommended strategy for the company in light of these predictions considering the challenges faced during the presentation and each of the 4 parts of the strategy analysis (again, based on strong evidence and analysis from marketing, finance, and strategy). Be concise and use APA format 6th edition. This 7 - 9 page written report is due via Canvas at the end of the semester.

#### **H. Participation (170 points)**

The success of the course will be impacted by the quality of your daily participation in and out of class. Participation will be based upon the depth and relevance of your contributions in class to discussions (including the case studies, lectures, and other assignments) and activities. It will also be based upon your contribution to your group, as evidenced by peer evaluations. Class attendance is required and any absences will lower your participation grade.

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## **INCOMPLETES AND LATE ASSIGNMENTS**

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All assignments are to be submitted/turned in by the beginning of the class session when they are due—including assignments posted in Canvas. Incompletes will only be assigned under extremely unusual circumstances.

## **SPIRITUAL CARE**

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PLNU strives to be a place where you grow as a whole person. To this end, we provide resources for our graduate students to encounter God and grow in their Christian faith. At the Mission Valley (MV) campus we have an onsite chaplain, Rev. Gordon Wong, who is available during class break times across the week. If you have questions for, desire to meet or share a prayer request with Rev. Wong you can contact him directly at [mvchaplain@pointloma.edu](mailto:mvchaplain@pointloma.edu) or [gordonwong@pointloma.edu](mailto:gordonwong@pointloma.edu). Rev. Wong's cell number is 808-429-1129 if you need a more immediate response. In addition, on the MV campus there is a prayer chapel on the third floor which is open for use as a space set apart for quiet reflection and prayer.

## **PLNU COPYRIGHT POLICY**

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Point Loma Nazarene University, as a non-profit educational institution, is entitled by law to use materials protected by the US Copyright Act for classroom education. Any use of those materials outside the class may violate the law.

## **PLNU ACADEMIC HONESTY POLICY**

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Students should demonstrate academic honesty by doing original work and by giving appropriate credit to the ideas of others. Academic dishonesty is the act of presenting information, ideas, and/or concepts as one's own when in reality they are the results of another person's creativity and effort. A faculty member who believes a situation involving academic dishonesty has been detected may assign a failing grade for that assignment or examination, or, depending on the seriousness of the offense, for the course. Faculty should follow and students may appeal using the procedure in the university Catalog. See the [Academic Honesty Policy](#) in the Graduate and Professional Studies Catalog for definitions of kinds of academic dishonesty and for further policy information.

## **PLNU ACADEMIC ACCOMMODATIONS POLICY**

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PLNU is committed to providing equal opportunity for participation in all its programs, services, and activities. Students with disabilities may request course-related accommodations by contacting the Educational Access Center (EAC), located in the Bond Academic Center ([EAC@pointloma.edu](mailto:EAC@pointloma.edu) or 619-849-2486). Once a student's eligibility for an accommodation has been determined, the EAC will issue an academic accommodation plan ("AP") to all faculty who teach courses in which the student is enrolled each semester.

PLNU highly recommends that students speak with their professors during the first two weeks of each semester/term about the implementation of their AP in that particular course and/or if they do not wish to utilize some or all of the elements of their AP in that course.

Students who need accommodations for a disability should contact the EAC as early as possible (i.e., ideally before the beginning of the semester) to assure appropriate accommodations can be provided. It is the student's responsibility to make the first contact with the EAC.

## **PLNU ATTENDANCE AND PARTICIPATION POLICY**

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Regular and punctual attendance at all class sessions is considered essential to optimum academic achievement. Therefore, regular attendance and participation in each course are minimal requirements. Absences are counted from the first official meeting of the class regardless of the date of the student's enrollment. If more than twenty percent of the classes are reported as missed, the faculty member may initiate the student's de-enrollment from the course without advance notice to the student. For the

2022-2023 academic year, if absences exceed twenty (20) percent of the total number of class meetings but are due to university excused health issues, an exception will be granted. If the date of de-enrollment is past the last date to withdraw from a class, the student will be assigned a grade of “F” or “NC.” There are no refunds for courses where a de-enrollment was processed. See [PLNU’s policy](#) in the Graduate and Professional Studies Catalog for additional detail.

### Asynchronous Attendance/Participation Definition

For any asynchronous class scheduled by the faculty member, a day of attendance is determined as contributing a substantive note, assignment, discussion, or submission by the posted due date. Failure to meet these standards will result in an absence for that day. Instructors will determine when asynchronous attendance days are required in a given week, if any.

### USE OF TECHNOLOGY

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In order to be successful in your course, you'll need to meet the minimum technology and system requirements; please refer to the [Technology and System Requirements](#) information. Additionally, students are required to have headphone speakers, microphone, or webcams compatible with their computer available to use for any online or hybrid classes. Please note that any course with online proctored exams require a computer with a camera (tablets are not compatible) to complete exams online.

Problems with technology do not relieve you of the responsibility of participating, turning in your assignments, or completing your class work.

### FINAL EXAMINATION POLICY

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N/A

### COURSE SCHEDULE AND ASSIGNMENTS

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*Note: See Canvas for additional details and minor schedule changes (e.g., executive speaker dates)*

| Week | Meeting Dates                         | CH | Topic  | Activities and Items Due  |
|------|---------------------------------------|----|--|---|
| 1    | July 4 & 7<br>(Light Week - No Class) | -  | Introduction & Course Preparation                    | - Read Syllabus<br>- CSA: Research Public Company<br>- Post Current Photo, Job, & Dream Job: Due 7/9                                  |
| 2    | July 11                               | 1  | Strategy, Business Models, and Competitive Advantage | - Introductions<br>- Chapter 1 Quiz<br>- DUE: Group Formation   |
| 2    | July 13                               | -  | Strategic Management Decisions                       | - <b>Research Workshop: Business Librarian</b><br>- Management Simulation: Prepare for Your Role (as assigned)<br>- DUE: CSA Proposal |
| 3    | July 18                               | 2  | Strategy Governance                                  | - Management Simulation: Discussion<br>- DUE: CSA Company History & Overview  |
| 3    | July 20                               | 3  | Evaluating a Company's External Environment          | - Chapter 2 & 3 Quiz<br>- Case: Twitter   |

|   |         |             |   |   |
|---|---------|-------------|---|---|
| 4 | July 25 | 4           | Evaluating a Company's Resources, Capabilities & Competitiveness  | - DUE: CSA External Environment<br>- <b>Executive Speaker</b>                                       |
| 4 | July 27 | 5           | The Five Generic Competitive Strategies                           | - Chapter 4 & 5 Quiz<br>- Case: Under Armour  |
| 5 | Aug 3   | 6           | Strengthening a Company's Competitive Position                    | - DUE: CSA Market & Value Creation<br>- Game Theory: Game On!                                       |
| 5 | Aug 5   | 7           | Strategies for Competing in International Markets                 | - Chapter 6 & 7 Quiz<br>- Case: iRobot  |
| 6 | Aug 8   | 8,<br>App A | Corporate Strategy: Diversification and the Multibusiness Company | - Case: Disney  |
| 6 | Aug 10  | 9           | Ethics, CSR, Sustainability and Strategy                          | - Chapter 8 & 9 Quiz<br>- DUE: CSA Financial Analysis   |
| 7 | Aug 15  | -           | Strategic Management  | - <b>Executive Speaker</b><br>- Simulation<br>- DUE: Post CSA Project Proposals on Discussion Board |
| 7 | Aug 17  | 10          | Superior Strategy Execution                                       | - Chapter 10 Quiz<br>- Group time   |
| 8 | Aug 22  | -           | Final Presentations   | - CSA Final Presentations<br>- CSA Investor Assignment: Due 8/23                                    |
| 8 | Aug 24  | -           | Course Wrap Up  | - DUE: Team Evaluations<br>- DUE 8/27: Independent Industry Predictions Paper                       |