FLORIDA GULF COAST UNIVERSITY
Lutgert College of Business
Department of Management

GEB 6895
BUSINESS STRATEGY
CRN: 82117
On-Line Virtual Class

Fall 2015
August 19 through December 7, 2015

Dr. ARTHUR J. RUBENS
Professor of Management
Lutgert College of Business
Department of Management
Course Syllabus
GEB 6895 (CRN 82117)
Business Strategy
Fall 2015

FACULTY/ADMINISTRATION
Dr. Arthur Rubens, Professor of Management
Office: LCOB, Room 3310
Phone: (239) 590-7840
Email: arubens@fgcu.edu
Classroom: Virtual
Online Chat: As Scheduled (TBA)
Office Hours: Virtual Chat Sessions or Skype Calls by appointment

Dr. ARTHUR J. RUBENS is a Professor of Management in Lutgert College of Business and founding faculty of Florida Gulf Coast University in Fort Myers, FL. He currently teaches in the BS, MBA, EMBA, and international programs at FGCU and is a Visiting Research Scholar at the University of Macerata, in Macerata, Italy for the Fall 2015 semester. Dr. Rubens primary areas of teaching and research interests are in Business Strategy, Leadership, International Management, Economic Development, Entrepreneurship, Ethics, and Quality Management. Prior to Dr. Rubens current appointment, he held joint faculty and administrative position as the Director of Sponsored Projects and Programs in the College of Business, Center for Leadership and Innovation. In addition, he was the founding Chair of the Public Administration Department at FGCU.

Dr. Rubens received his doctorate in health administration in 1990 from the University of Pittsburgh and has Master Degrees in Public Administration and Health Science. Dr. Rubens has over 25 years professional experience in the management field as a manager, educator, researcher, entrepreneur, and consultant which includes management and executive professional development training and organizational consulting for private, public and non-profit entities.

Dr. Rubens is an active researcher, keynote speaker and workshop presenter and has authored and co-authored numerous publications in international business, leadership, economic development, ethics, and health service delivery. Dr. Rubens has taught students from all over the world, having most recently taught in Italy, New Zealand, Denmark, Germany, and China. Dr. Rubens was born in Canada and lived and worked for several years in Europe. He has traveled extensively throughout Europe, the Middle East, Africa, and Asia, and has lived in Southwest Florida since 1997.

CONTACT
The best way to contact me is through email. You can email me through Canvas or my FGCU email account. Although it is my policy to try to get back with you within 24 hours, I will be out of the country for most of the term (6 hours ahead) and might have limited internet access at times, thus, email responses might be delayed. Also, optimally, try to send your email questions during the week to ensure faster response.
CATALOG DESCRIPTION

MBA capstone experience that requires students analyze and implement solutions to complex organizational problems and opportunities. Students are required to incorporate knowledge acquired in all areas of the MBA program in actual business situations and present their findings in highly professional oral and written formats.

PREREQUISITES

This class should be taken in the last semester of your MBA program. It is expected that all students will have completed the following courses, or their equivalents, prior to enrolling in this course:

- ACG 6025 - Accounting Fundamentals for Managers
- ECO 5005 - Fundamentals of Micro & Macro Economic Analysis
- FIN 5405 - Foundations of Business Finance
- MAN 6055 - Contemporary Management Concepts
- MAR 6815 - Marketing Management

CREDIT HOUR STATEMENT:

For each credit of a class, you should expect to spend one hour in class and an average of two hours preparing outside of class each week. Therefore, since this is a three-credit class, you should plan to devote an average of nine hours a week to this class.

LEARNING OUTCOMES/ASSESSMENT

LCOB Mission Statement

The Lutgert College of Business provides a high quality, student-centered learning environment to prepare students with the knowledge and skills needed to contribute to and take leading positions in business and society. Our faculties are devoted to teaching excellence, scholarship, and service that enhances our academic and business communities and we are dedicated to building partnerships that foster the economic growth of the southwest Florida region and beyond.

LCOB, MBA Learning Goals/Objective

Graduates of LCOB MBA program will have: Leadership abilities, will be Critical thinkers, will have Global awareness, and have a Strategic perspective

**Leadership:** demonstrate effective communication skills; construct a personal leadership plan

**Critique:** Formulate effective solutions to business problems

**Global:** Evaluate the global impact of business decisions; explain the ethical implications of business decisions.

**Strategies:** Synthesize interdisciplinary knowledge to make strategic decisions; and Examine the environmental impact of business decisions.

All MBA graduates will be able to: a) prepare and present reports that are clear and concise; b) work effectively with others as both a participant and leader in a diverse team; c) solve business problems using critical thinking and analytical approaches; d) apply knowledge of the diverse demographics and environmental complexities to decision making with a global operating environment; e) apply legal, ethical, social and environmental considerations to business problems and opportunities; and f) analytically link interdisciplinary business data, knowledge, and insight to make quality strategic decisions.
**Student Learning Outcomes**
Upon completion of the course, the student should be able to:

<table>
<thead>
<tr>
<th>MBA Graduates will: LCGS (leadership critique global strategies)</th>
<th>Learning Objectives – graduates will be able to:</th>
<th>Course Learning Outcomes</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Have leadership abilities</strong></td>
<td>Prepare and present reports that are clear and concise.</td>
<td>Demonstrate oral and written presentation ability</td>
<td>II, III</td>
</tr>
<tr>
<td>- Demonstrate effective communication skills.</td>
<td></td>
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<td></td>
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<tr>
<td>- Construct personal leadership plan.</td>
<td>Work effectively with others as both as participant and a leader in a diverse team.</td>
<td>Work effectively with others</td>
<td>I, III</td>
</tr>
<tr>
<td><strong>Be critical thinkers:</strong></td>
<td>Solve business problems using critical thinking and analytical approaches.</td>
<td>Integrate business capabilities and functions in an analytical matter.</td>
<td>II, III, IV</td>
</tr>
<tr>
<td>- Formulate effective solutions to business problems.</td>
<td></td>
<td>Develop and apply knowledge of strategic decision making in a variety of real world contexts.</td>
<td>II, III</td>
</tr>
<tr>
<td><strong>Have global awareness</strong></td>
<td>Apply knowledge of the diverse demographics and environmental complexities to decision making within a global operating environment.</td>
<td>Demonstrate an understanding of the impact of culture, ethics, and legal issues in strategic management decision making.</td>
<td>II, III</td>
</tr>
<tr>
<td>- Evaluate the global impact of business decisions.</td>
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<tr>
<td>- Explain the ethical implications of business decisions.</td>
<td>Apply legal, ethical, social and environmental considerations to business problems and opportunities.</td>
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<tr>
<td><strong>Have a strategic perspective</strong></td>
<td>Analytically link interdisciplinary business data, knowledge, and insight to make quality strategic decisions.</td>
<td>Develop and demonstrate an understanding of key strategic management concepts, models, and literature.</td>
<td>I, II, III, IV</td>
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<tr>
<td>- Synthesize interdisciplinary knowledge to make strategic decisions.</td>
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<tr>
<td>- Examine the environmental impact of business decisions.</td>
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**Assessment Method**

I) Discussion Participation (Case, Readings, and Questions) 25%
II) Individual Written Case Review 15%
III) Capstone Individual Industry Review/Presentation 35%
IV) Exam (1 & 2) 25%
Total 100%
TEACHING METHODS & LEARNING STRATEGIES

Course is a virtual on-line class and will include class and e-mail participation, individual and group exercises, individual research, and individual presentation via discussion forums, and written reports. Students will be assigned specific cases, readings, and topics and be assigned to lead discussion forum among their classmates. Learning strategies will be student focused, using both self-directed and group interaction. Students are expected and encouraged to apply his/her own professional experiences and perspectives to support and reinforce class material.

TEXTS AND READINGS


- Current articles from newspaper (Wall Street Journal) and select business related journals, i.e., Business Week, Economist, etc. (selected by student) (Students should either subscribe to one of the business sources (ideally WSJ) or regularly access the material via the FGCU Library.

Optional Text (Highly Recommended):


HARVARD BUSINESS CASE STUDIES

As part of the course we will be discussing and writing up reviews for Harvard Business School (HBS) cases. The following cases will be discussed in the class this semester:

1. SodaStream Takes on Coke and Pepsi (Product #14118)
2. BP and the Gulf of Mexico Oil Spill (Product #11366)
3. House of Tata: Acquiring a Global Footprint (Product #9-708-446)
4. Walt Disney Company & Pixar, Inc. (Product #9-709-424)
5. Teva Pharmaceuticals Industries, LTD (Product #9-707-44)
6. Whole Foods Market, Inc (Product #9-475-476)
7. Zara: Fast Fashion (Product #9-703-497)
8. Geox: Breathing Innovation into Shoes (Prod#U895)
9. Tesla Motors (in 2013): Will Sparks Fly in the Automobile Industry (Prod# MH0017)

HBS Cases: may be obtained by registering at the HBS student site: https://cb.hbsp.harvard.edu/cbmp/import/ptos/32181856 (Each case is approximately $3.95).
To access the case course packets for the class go to: https://cb.hbsp.harvard.edu/cbmp/access/38140676
RECOMMENDED READING: HARVARD BUSINESS REVIEW ARTICLES


All these articles are available to students for free through the FGCU online library in the database “Business Source Premier.”
COURSE REQUIREMENTS

1. **Weekly Discussion Forums** (25%)

   This course contains numerous significant class activities. Although the class is conducted on-line, your participation and attendance to regularly monitoring and contributing to discussion forums is of the utmost importance. Therefore, all students are expected to initiate and actively participate in virtual class discussion on the assigned case, reading and topics of interest. The instructor will serve as an observant and sometimes a facilitator/evaluator. In addition, it is anticipated that student will apply his/her own professional and/or academic experiences to the discussion and critical evaluation of the course material, cases and presentations.

   Course topics readings and cases will be divided into **weekly sessions**. Students are expected to actively participate in posted class forums in a timely manner (it is recommended that students respond to posts no later than 48 hours after the initial posts; ideally it should be within 24 hours). Please note that all class participation and weekly assignments are due each week and must be submitted prior to close date for the week (Sunday, 11:59pm), however, again, it is ESSENTIAL that students submit their posts early in order to give other students the opportunity to respond to them; thus creating the opportunity for a virtual dialog with the class.

   Class participation grade will primary involved:

   - Original Posts
   - Reponses to Posts
   - Quality of Posts

   Typically Two **Discussion Forums** will be posted each week. Weekly Discussion Forums will include:

   - **Discussion Forum - Readings and Commentaries**: A general open discussion of assigned reading, content from text, and/or current event taken from the Wall street Journal or other source will be discussed by the students. This is an open forum which students can bring topics and events of interest regarding strategy to the class and discuss them. It is also hoped and expected that students will submit at least 1 commentary (from the Wall Street Journal or other medium) for student comments. *This discussion forum is driven by you and gives you the opportunity to openly discuss readings, commentaries, or other material that is assigned and presented.*

   - **Discussion Forum - Case Study**: Over the semester we will discuss case studies. It is expected that all students will actively participate in case discussions.

   Online participation in class activities is expected and will be recorded. You are responsible for advising the instructor by email of the reasons for any extended absences in advance.

   Participation will be assessed as follows:

   I. **Introduction**

   - Introduction on the online discussion thread – week one

   II. **Articles** (Obtained through FGCU Library)
III. Minicases and HBR Short Cases
Minicases (In text)
- Does Facebook have a Strategy
- The Wonder from Sweden: Is IKEA’s success sustainable?
- Starbucks: Re-creating its uniqueness
- Which Automobile Technology Will Win
- The Rise of Samsung
- The Mission vs. the Bottom Line (HBR Short Case - found in resource folder in Module)

IV. Cases (HBR Course Packet):

The characteristics of a valuable on-line discussion contribution are as follows:
- **Relevance**: Are your comments clearly related to the article, case or reading and to the comments of others? Does your comment stick to a subject or does it wander?
- **Advancement**: Does your comment move the discussion forward? Does it take the discussion farther and deeper than previous comments or does it reiterate past comments?
- **Fact–based**: Have you used specific facts from the article, case or reading to support your analysis or do they leave open other interpretations?
- **Logical**: Is your reasoning consistent and logical or are there gaps in your logic? Do you use concepts from the readings and lectures corresponding to the current and previous weeks of the course?

V. Weekly Discussion Thread
You may raise questions on the chapters and other course material, and/or discuss topics of interest related to the class in the weekly class discussion thread.

2. Written Case Review (15%)
Case analysis emphasizes applying problem identification and problem solving to a variety of real organizational and industry environments. It involves diagnosing the organization and its environment, identifying major problems, and prescribing solutions through the development of meaningful alternatives and programs of implementation. Analysis includes quantitative and qualitative factors pertaining to the industry; the organization’s operating functions, and the managerial process.

For this assignment, one case study will be assigned to all students which a written analysis and review will be written. On the week the case is due, students will discuss their case write-ups.

Written Analysis
For the case or cases, students will write up a written report. Below is grading rubric for case(s) written reviews:
## Case Review Grading Rubric

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<th>05%</th>
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<tbody>
<tr>
<td><strong>Introduction</strong></td>
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<tr>
<td>An identification and discussion of the one or two key strategic problems/issues detected in the case (you will be assessed on your ability to size-up the organization’s situation and to identify key problems/issues);</td>
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<tr>
<td><strong>Case Questions:</strong></td>
<td>80%</td>
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<tr>
<td>Provide full answers to the study questions</td>
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<tr>
<td>Demonstrate knowledge and mastery of case material in questions</td>
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<tr>
<td>Demonstrate knowledge of use of strategic tools in analysis</td>
<td></td>
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<tr>
<td>Show analytical and critical thinking in responses</td>
<td></td>
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<tr>
<td><strong>Summary/Recommendations</strong></td>
<td>10%</td>
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<tr>
<td>Present and show analytical and critical thinking in summary and recommendations</td>
<td></td>
</tr>
<tr>
<td><strong>Grammar/Spelling/Format</strong></td>
<td>05%</td>
</tr>
</tbody>
</table>

It is expected that the written analysis of the case range from 6-8, typewritten, double spaced pages. For the analysis, you should conduct additional research on the cases beyond the information provided in the case. Construction of paper (grammar, spelling, and style in addition to content) will considered when grading the paper. All cases should use standard American Psychological Association (APA) format (see the APA reference in the recommended text section). In particular, cases must be double spaced, employ 1” margins, use headings and subheadings where appropriate, use page numbers, use a 12-point Times or Times New Roman font. The references/works cited page at the end of the paper should follow the APA “published” format versus the “submitted” format.

All written analysis of the cases should be submitted to the Case drop box on case due date (specific case and due date is noted in the syllabus schedule).

See: Course Syllabus for assigned date of cases.

3. **Exam(s):** (25% - Exam 1, 10% and Exam 2, 15%)  
An online midterm and end of course exam will be given. The exams will primarily consist of multiple choice and short essay questions related to the text readings and exercises. The exams will typically be taken from the course test banks. The questions will be randomly selected from the test. Generally exams will be posted for a week time period over which students will complete the exam. Students will have approximately 90 – 140 minutes to take the on-line exam during the week. Further instructions and information will be posted on the Canvas Course Page.

4. **Capstone Project:** (35%)  
As part of the capstone class, each student will conduct an analysis of a publically traded company within an select industry. In pursuit of this students will select a primary company to analyze. All industry/company selections must be made by the end of the third week of class.
Briefly, students will conduct strategic analysis and review of a well-known publically quoted North American company (a list will be provided of Fortune top companies but students can select from this list and find other publically listed companies). The Company Review will consist of (1) a current situation analysis of the firm that identifies vision, mission, goals, values, strategies, performance, internal and external environmental analysis, risks and issues, (2) an analysis of potential future options and strategic choices, (3) recommendations for future business and corporate strategies, (4) a summary roadmap for implementation of your chosen recommendation. Your review should range from 2,000 – 3,000 words plus a 500 word abstract; however, it is acceptable to go a little over if necessary (additional material may be presented in appendices appropriately referenced in the main text). Students will also develop a presentation for their companies and present it the last day of class. Student presentation should include a narration of their presentation to receive maximum grade for the assignment (for your narration you can use screen cast software included in pp or some other software such as www.screencast-o-matic.com, etc.), however, at a minimum, pp notes must be included for each slide. All papers should use standard American Psychological Association (APA) format (see the APA reference in the recommended text section). Papers should have title page and table of content. Also all papers should be double spaced, employ 1” margins, use headings and subheadings where appropriate, use page numbers, use a 12-point Times or Times New Roman font. The references/works cited page at the end of the paper should follow the APA “published” format versus the “submitted” format. Although papers will not per se be graded for grammar, spelling, etc, these areas (grammar, spelling, and style in addition to content) will considered when grading the paper.

Note: The pp presentation is due with the written report on Sunday at 11:59pm prior to the beginning of the final capstone project presentation week. For more detailed information about the case, please refer to:

Appendix 2 – Capstone Guidelines

EVALUATION METHODS/ASSESSMENT

I) Discussion Participation (Case, Readings, and Questions) 25%
II) Individual Written Case Review 15%
III) Individual Industry Review/Presentation 35%
IV) Exam (1 & 2) 25%
Total 100%

GRADING SCALE

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>93.00-100</td>
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<tr>
<td>A-</td>
<td>90.00-92.99</td>
</tr>
<tr>
<td>B</td>
<td>83.00-86.99</td>
</tr>
<tr>
<td>B-</td>
<td>80.00-82.99</td>
</tr>
<tr>
<td>C</td>
<td>73.00-76.99</td>
</tr>
<tr>
<td>B+</td>
<td>77.00-79.99</td>
</tr>
<tr>
<td>C+</td>
<td>70.00-72.99</td>
</tr>
</tbody>
</table>

Average Workload

<table>
<thead>
<tr>
<th>Area</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Line Discussion and Participation</td>
<td>45</td>
</tr>
<tr>
<td>Preparation, class processing and case review</td>
<td>40</td>
</tr>
<tr>
<td>Work on individual case review</td>
<td>20</td>
</tr>
<tr>
<td>Work on Capstone Individual Project</td>
<td>80</td>
</tr>
<tr>
<td>Average Workload</td>
<td>185</td>
</tr>
</tbody>
</table>
CLASS AND UNIVERSITY POLICY

Academic Dishonesty/Cheating Policy
"All students are expected to demonstrate honesty in their academic pursuits. The university policies regarding issues of honesty can be found under the "Student Code of Conduct in the Student Guidebook. All students are expected to study this document, which outlines their responsibilities and consequences for violations of the policy."

Please note, that I expect you to maintain the highest standards of academic honesty and integrity while in this course and as a student at Florida Gulf Coast University. In addition to standard definitions of honesty, integrity, and plagiarism, this policy also prohibits you from using previous work products created for this course by other students, doing any outside research on the individual Harvard cases, and allowing other persons contribute to the creation of your work product. If you fail to maintain these standards as a student in this class I will pursue the fullest possible implementation of academic discipline for your offence. The FGCU Student Guidebook is available online at http://studentservices.fgcu.edu/judicialaffairs/new.html

Plagiarism
Plagiarism occurs whenever you copy someone’s writing, even partially, and fail to reference it in your paper. If anyone is found plagiarizing, they will be given an automatic 0 for their assignment and the individual will be turned over to Judicial Affairs. In addition, you are responsible for your team members. If anyone caught plagiarizing, then the individuals will be given a 0 for the assignment. IF YOU HAVE ANY QUESTIONS AS TO WHETHER SOMETHING WILL BE CONSIDERED PLAGERIZED, BE SAFE AND REFERENCE THE SOURCE. If you copy a substantial amount of the sentence from a source, it should be referenced with QUOTATIONS. If you paraphrase it, you must reference it but you do not need quotes.

Disability Accommodations Services
“Florida Gulf Coast University, in accordance with the Americans with Disabilities Act and the university’s guiding principles, will provide classroom and academic accommodations to students with documented disabilities. If you need to request an accommodation in this class due to a disability, or you suspect that your academic performance is affected by a disability, please contact the Office of Adaptive Services. The Office of Adaptive Services is located in Howard Hall 137. The phone number is 239-590-7956 or TTY 239-590-7930”

Student Observance of Religious Holidays
“All students at Florida Gulf Coast University have a right to expect that the University will reasonably accommodate their religious observances, practices, and beliefs. Students, upon prior notification to their instructors, shall be excused from class or other scheduled academic activity to observe a religious holy day of their faith. Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence. Students shall not be penalized due to absence from class or other scheduled academic activity because of religious observances. Where practicable, major examinations, major assignments, and University ceremonies will not be scheduled on a major religious holy day. A student who is to be excused from class for a religious observance is not required to provide a second party certification of the reason for the absence.”
Resources for Faculty General Education
Information on General Education program requirements is available online at http://www.fgcu.edu/General_Education/index.html

Service-Learning: Information on integrating service-learning into the course and course syllabus is available online at http://www.fgcu.edu/Connect/

Distance-Learning: Information on distance learning courses is available online at http://itech.fgcu.edu/distance/

Online Tutorials: Information on online tutorials to assist students is available online at http://www.fgcu.edu/support/

CANVAS Learning Management System and Demonstration Site
Information on CANVAS is available online at http://elearning.fgcu.edu/frames.aspx and http://elearning.fgcu.edu/section/default.asp?id=xxxDemoOnlineCourseStudent

Library Resources
Main page: http://library.fgcu.edu/
Tutorials & Handouts: http://library.fgcu.edu/RSD/Instruction/tutorials.htm
Research Guides: http://fgcu.libguides.com/
Faculty Support: http://library.fgcu.edu/faculty_index.html
Contact Us: http://library.fgcu.edu/LBS/about/contactus.htm

Business Librarian: Regina Beard: Office: Lib 219, Phone: 239-745-4372; Email: rmbeard@fgcu.edu

HBR Readings may be obtained from the FGCU Library (http://library.fgcu.edu/) through the database “Business Source Premier.”
HBS Cases: may be obtained by registering at the HBS student site: https://cb.hbsp.harvard.edu/cbmp/import/ptos/32181856 (Each case is approximately $3.95).
To access the case course packets for the class go to: https://cb.hbsp.harvard.edu/cbmp/access/38140676
### GEB 6895
**BUSINESS STRATEGY**
Virtual/Online
*CLASS SCHEDULE (Subject to adaptation)*
FALL 2015

<table>
<thead>
<tr>
<th>Week / Date</th>
<th>Topic, Readings and Case Assignments</th>
<th>Activities/Assignments Due</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week 1</strong></td>
<td>Introduction to Course and Strategy</td>
<td>Student Introduction</td>
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<tr>
<td>Aug 19-23</td>
<td>- Chapter 1</td>
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<td>- Syllabus (Review)</td>
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<tr>
<td><strong>Week 2</strong></td>
<td>What is Strategy and Why is it important? Strategic Management Process</td>
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<tr>
<td>Aug 24-30</td>
<td>- Chapter 2</td>
<td>Class Discussion</td>
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<td>- Reading: Porter, What is Strategy</td>
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<td></td>
<td>- Mini-Case 1: Does Facebook Have a Strategy</td>
<td>Class Discussion</td>
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<tr>
<td><strong>Week 3</strong></td>
<td>External Analysis</td>
<td>Company Selected Due: Sunday 11:59pm</td>
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<td>Aug 31-Sept 6</td>
<td>- Chapters 3</td>
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<td>- Reading: Collins: Building Your Company Strategies</td>
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<td>HBS Case: BP and the Gulf of Mexico Oil Spill</td>
<td>Class Discussion</td>
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<tr>
<td><strong>Week 4</strong></td>
<td>External Analysis</td>
<td>Sept 7 - Labor Day</td>
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<tr>
<td>Sept 7-13</td>
<td>- Reading: Porter, The 5 Competitive Forces</td>
<td>Class Discussion</td>
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<td>HBS Case: SodaStream</td>
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<td><strong>Week 5</strong></td>
<td>Internal Analysis</td>
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<tr>
<td>Sept 14-20</td>
<td>- Chapter 4</td>
<td>Class Discussion</td>
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<td>- Reading: Prahalad, Core Competence of the Corporation</td>
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<td>HBS: Zara: Fast Fashion</td>
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<td><strong>Week 6</strong></td>
<td>Competitive Advantage and Firm Performance</td>
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<tr>
<td>Sept 21-27</td>
<td>- Chapter 5</td>
<td>Class Discussion</td>
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<td>- Reading: Lafley et al, Bringing Science to Art of Strategy</td>
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<td>HBS: Teva</td>
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<tr>
<td><strong>Week 7</strong></td>
<td>EXAM 1</td>
<td>Exam 1</td>
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<tr>
<td>Sept 28-Oct 4</td>
<td><strong>Open:</strong> Sept 28, 1:00am</td>
<td>Closed: Sunday, Oct 4 at 11:59pm</td>
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<td></td>
<td>- Chapters 1-5</td>
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<td><strong>Week 8</strong></td>
<td>Business Strategy: Differentiation, and Integration</td>
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<tr>
<td>Oct 5-11</td>
<td>- Chapter 6</td>
<td>Class Discussion</td>
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<td></td>
<td>- Reading: Johnson, Reinventing your Business Model</td>
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<td>Mini-Case 14: The Rise of Samsung Electronics</td>
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<td>Week / Date</td>
<td>Topic, Readings and Case Assignments</td>
<td>Activities/Assignments Due</td>
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<td>Week 9 Oct 12-18</td>
<td>Corporate Strategy: Integration, Diversification, Mini-Case 12: Which Auto Technology Will Win HBS Case: Tesla Motors-Will Sparks Fly in the Automobile Industry</td>
<td>Tesla Case Write-up Due Sunday Oct 11 at 11:59pm</td>
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<td>• Chapter 8</td>
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<td>• Readings: Brandenburger, et al, The Right Game</td>
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<td>• Video: Who Killed the Electric Car</td>
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<td>Week 10 Oct 19-25</td>
<td>Acquisitions, Alliances and Networks</td>
<td>Class Discussion</td>
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<td>• Chapter 9</td>
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<td>• Readings: Mankins, Turning Great Strategy into Great Performance</td>
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<td>HBS Disney – Pixar Case Study</td>
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<td>Week 11 Oct 26-Nov 1</td>
<td>Global Strategies</td>
<td>Class Discussion</td>
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<td>• Chapter 10</td>
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<td>• Reading: Skull, How to thrive in a Turbulent Market</td>
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<td>• Reading: Courtney, Strategy Under Uncertainty</td>
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<td>• Reading: Davis, KFC’s Radical Approach to China</td>
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<td>Mini-Case 5: IKEA: Wonder from Sweden</td>
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<td>HBS: Tata Motors</td>
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<td>Week 12 Nov 2-8</td>
<td>Business Strategy: Innovation, Entrepreneurship</td>
<td>Class Discussion</td>
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<td>• Chapter 7</td>
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<td>• Readings: Kim, Blue Ocean Strategy</td>
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<td>• Readings: Norton, Balanced Scorecard</td>
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<td>Mini-Case 4: Starbucks HBS: Geox: Breathing Innovation Into Shoes</td>
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<td>Week 13 Nov 9-15</td>
<td>Organizational Design, Culture, Structure and Control and Corporate Governance, Ethics, and Strategic Leadership</td>
<td>Class Discussion</td>
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<td>• Chapter 11 &amp; 12</td>
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<td>• Readings: Porter, Creating Shared Value</td>
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<td>• Readings: Porter, Link Between Competitive Advantage and Corp. Social Responsibility</td>
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<td>HBR Mini Case: The Mission versus the Bottom Line HBS: Whole Foods</td>
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<td>Week 14 Nov 16-22</td>
<td>Capstone Project Presentations (Present and Discuss Capstone Projects)</td>
<td>Project Report Due: Sunday, Nov 15 11:59pm</td>
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<td>• Discuss Capstone Projects</td>
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<td>Week 15 Nov 23-29</td>
<td>Thanksgiving</td>
<td>Class Discussion</td>
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<td>• Enjoy Thanksgiving Holiday and prepare for final exam</td>
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<td>Week 16 Nov 30-Dec 6</td>
<td>Exam 2 Open: Nov 30; 1:00am</td>
<td>Exam 2 Closed: Dec 6, 11:59pm</td>
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<td>Chapters 6-12</td>
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*This schedule is tentative and the instructor reserves the right to modify this schedule as circumstances dictate. The last date to drop without academic penalty is Friday March 27. Further information and instructions about the following assignments will be provided in separate documents to be posted on Canvas.
APPENDIX 1

CASE STUDY QUESTIONS

SodaStream Takes on Coke and Pepsi (Product #14118)
1. What is SodaStream’s business Model? How is it different from the conventional carbonated soft drinks business model (e.g., coke, pepsi, etc)?
2. What challenges does SodaStream face as the disruptor and how should it approach these challenges?
3. What would you recommend SodaStream do to reach its goals?

BP and the Gulf of Mexico Oil Spill (Product # 11366)
1. Do you agree or disagree with Tony Hayward’s quote at the end of the case, and was this disaster strictly a BP failure or an industry accident?
2. What were the most significant flawed decisions made by BP and its partners in this case?
3. How did BP’s history and culture shape decision-making on the Deepwater Horizon rig and how did the political and regulatory environment affect decision-making by BP and its partners?
4. In what ways did BP lack the appropriate safety culture and what could it have done to build a stronger safety culture?
5. Why did so many employees – engineers, managers and rig workers – deem it appropriate to take significant risks?
6. Why did workers and management on the rig fail to oppose some of the poor choices that were made?
7. What should Tony Hayward have done in the immediate aftermath of the accident to manage the crisis more effectively?

House of Tata: Acquiring a Global Footprint (Product # 9-708-446)
1. What is your assessment of the globalization strategies of the Tata Group operating companies, particularly Indian Hotels, Tata Tea, and Tata Steel?
2. What is your assessment of the role of the Tata Group center in globalization?
3. Should Tata Motor’s bid for Ford’s Land Rover and jaguar units as part of its globalization efforts, and what are the pros and cons?

Walt Disney Company & Pixar, Inc. (Product # 9-709-424)
1. Which is greater: the value of Pixar and Disney in an exclusive relationship, or the sum of the value that each could create if they operated independently of one another or were allowed to form relationships with other companies? Why?
2. Assuming that Pixar and Disney are more valuable in an exclusive relationship, can that value be realized through a new contract? Or is common ownership required (i.e., must Disney acquire Pixar)?
3. If Disney does acquire Pixar, how should Bob Iger and his team organize and manage the combined entity? What challenges do you foresee, and how would you meet them?

Teva Pharmaceuticals Industries, LTD (Product # 9-707-44)
1. How did Teva succeed in Israel? Why did such a company emerge in Israel? How did Teva set itself apart from its competitors in Israel?
2. As the CEO of Teva, which markets would you concentrate on developing going forward?
3. As an executive in ‘big pharma,’ what approach would you take to deal with Teva?
4. Where is Teva vulnerable going forward?
Whole Foods Market, Inc (Product # 9-475-476)
1. What are ‘natural foods’? Is ‘natural foods’ a good business definition? What opportunities do natural foods offer for producers, distributors, and retailers?
2. What is Whole Foods’ strategy? How has it adapted it over time?
3. What challenges does Whole Foods face in 2006?
4. What would you advise CEO John Mackey to do to sustain Whole Foods’ lead?

Zara: Fast Fashion (Product #9-703-497)
1. How specifically do the distinctive features of Zara’s business model affect its operating economics? Specifically, compare Zara with an average retailer with similar posted prices. In order to express all advantages/disadvantages on a common basis, you may find it convenient to assume that on average, retail selling prices are about twice as high as manufacturers’ selling prices.
2. Can you outline the linkages among Zara’s choices about how to compete, particularly ones connected to its quick-response capability, and the ways in which they create competitive advantage? What does it suggest about such capabilities as bases for competitive advantage?
3. Why might Zara “fail”? How sustainable would you calibrate its competitive advantage as being relative to the kinds of advantages typically pursued by other apparel retailers?

Geox: Breathing Innovation into Shoes (Prod#U895)
1. What do creativity and innovation signify and entail and what are the key types of innovation?
2. Analyze Geox’s innovative strategy in detail. What are the features of this strategy that have made Geox shoes a success? What factors, other than product innovation, does Geox owe it competitive advantage?
3. Assess the market environment of the industries Geox operates in. Who are Geox’s key competitors? What strategies and options are available to Geox for sustaining its position in the industries?
All students will do a written analysis of the case study below. The written analysis of the case should range from 6-8, typewritten, double spaced pages. For the analysis, you should conduct additional research on the cases beyond the information provided in the case. Although papers will not be per se graded on grammar and spelling, all case reports should be well written and adhere to standard American Psychological Association (APA) format (see the APA reference in the recommended text section). Cases must be double spaced, employ 1” margins, use headings and subheadings where appropriate, use page numbers, use a 12-point Times or Times New Roman font. Below is rubric and guidelines to follow in case write-up:

### Case Review Grading Rubric

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<tr>
<th>Section</th>
<th>Weight</th>
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<tr>
<td>Introduction</td>
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<tr>
<td>Case Questions:</td>
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<td>Summary/Recommendations</td>
<td>10%</td>
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<td>Grammar/Spelling/Format</td>
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**Case Study: Tesla Motors (in 2013): Will Sparks Fly in the Automobile Industry**

1. Conduct an external/internal analysis of Case using: PESTEL (to identify forces affecting car manufacturing of alternate energy vehicles); SWOT (to analyze internal and external conditions Tesla must consider going forward); and VIRO (to evaluate whether Tesla has a sustained competitive advantage).
2. Focus on business, corporate, and/or global strategy in responding: “how does Elon Musk constrain Tesla options, and how has Tesla departed from existing auto industry practices?
3. What short term objectives are required for Tesla to survive?
4. What are the primary elements of Tesla’s internal and external environment that need to be addressed for it to achieve a sustained competitive advantage? (Your recommendations for the future)

All written analysis of the cases should be submitted to the Case drop box on case due date (specific case and due date is noted in the syllabus schedule).
APPENDIX 3

**GEB6895: Capstone Strategic Review**

**Individual Strategic Review (Worth 30%)**
Students will be asked to develop a strategic review of a well-known publically quoted North American company from the list provided by the instructor. Only one student will be permitted to work on a given company and students will be allowed to choose companies strictly on a first-come first-served basis. The review will consist of (1) a current situation analysis of the firm that identifies vision, mission, goals, values, strategies, performance, internal and external environmental analysis, risks and issues, (2) an analysis of potential future options and strategic choices, (3) recommendations for future business and corporate strategies, (4) a summary roadmap for implementation of your chosen recommendation. Your review should range from 2,000 – 3,000 words plus a 500 word abstract, however, it is acceptable to go a little over if necessary. Students will also develop a pp presentation for their companies and present it the last day of class. Student pp presentation should include a narration of their pp presentations to receive maximum grade for the assignment (for your narration you can use screencast software included in pp or some other software such as www.screencast-o-matic.com, etc.), however, at a minimum, pp notes must be included for each slides.

**Further General Instructions**
The purpose of this project is to provide you with an opportunity to apply the knowledge you gain throughout the course to conducting a strategic review of a well-known company. It is intended to test your ability as an individual to demonstrate mastery of the MBA Program goals (LCGS) as described in the syllabus and all of the specific GEB6895 goals as shown below:

1. Develop and demonstrate an understanding of key strategic management concepts, models, and literatures,
2. Improve ability to apply systems thinking and integrate business capabilities and functions through strategic analysis.
3. Develop and apply knowledge of strategic decision making in a variety of real world contexts.
4. Demonstrate an understanding of the impact of culture, ethics, legal and corporate social responsibility issues in strategic management decision making.
5. Improve oral and written presentation and report writing abilities.
6. Develop a critical understanding of current business events and compare and contrast real world events with academic theories in strategic management.

The body of the review should be around 2,000 – 3,000 words in length and the word length must be shown on the front page. There should be a Table of Contents with page referencing. You should also present at the beginning an abstract of no more than 500 words summarizing the main findings of your project, (500 words not included in the 2,000-3,000 plus words). Times New Roman type should be used with 12 point character size, double-spaced. Pages should have one inch margins and pagination. Generally 2,500 words will equal approximately 10.3 pages, and 3,500 words will equal 14.5 pages. Additional material may be presented in appendices appropriately referenced in the main text. While the permitted word length does not include appendices you should avoid placing excessive material in appendices. You should make good use of tables and exhibits and may also place links to material on the internet in your presentation (e.g. videos). You are encouraged to make your presentation as interesting as possible while at the same time maintaining a professional style.
NOTE: Although you don’t want to go greatly over the length of the report, but when in doubt, it is better to include more in your report than less (you do not want to run the risk of not including needed material in your report).

Final written reports and accompanying pp presentations are due in the Canvas assignment dropbox on Sunday at 11:59pm prior to the presentation week. During the final presentation week student will submit their pp and respond to discussion of their company presentations, as well as commenting on your classmates presentations.

Grading Rubric
In grading I will especially be looking for evidence of demonstrated mastery of the material from the textbook chapters and assigned readings in the presentation. I will also be looking for good critical thinking and analysis as well as thorough background research. Your assignment will be graded according to how well you address each of the following topics. The percentage weightings of grade shown for each section 1-6 are for guidance and may be varied depending on the specific nature of your chosen company.

1. Current Situation Analysis (e.g. 30% of grade)
   - Description of company background
   - Overall vision, mission, goals, values
   - Corporate performance on important metrics (e.g. financial, market share, growth last 3 years)
   - Identification and description of key corporate and business strategies
   - Analysis of both the macro and micro environment using varied strategic tools learned in class such as STEEP, PESTLE, 5 forces analysis (as you consider applicable to key important businesses), SWOT, Cultural/leadership analysis, etc. capabilities and core competencies analysis, and implications for sustainable competitive advantage; e.g., VIRO, etc
   - Identification and description of key issues for future strategy
   - Demonstrated use and mastery of appropriate information sources and material in relevant chapters of the text (e.g. 1 to 9)

2. Future Options and Strategic Choices (e.g. 20% of grade)
   - Identification and discussion of key alternative future options for:
     - Corporate strategy (diversification, international, M&A etc)
     - Business strategy (in key business units)
   - Demonstrated use and mastery of relevant chapters of the text and related materials.

3. Recommendations (e.g. 15% of grade)
   - Your recommendations for corporate and business strategies
   - Discussion of organizational changes needed to support your recommended strategies and identification of key implementation factors
   - Demonstrated use and mastery of relevant chapter of the text and related materials.

4. Summary Roadmap (e.g. 15% of grade)
• High level implementation plan (3 years)
• Key resources needed
• Discussion of risks and means to address these

5. Background Research and Analysis (10% of grade)

• Identification of appropriate information and knowledge sources
• Use of appropriate information and knowledge sources in the analysis
• Referencing using APA format

6. Overall Presentation (10% of grade)

• Overall quality of evidence/fact based analysis and critical thinking
• Organization of material into appropriate sections and subsections
• Overall quality of written communication, spelling and grammar, professional style
• Demonstrated online collaboration using Canvas

Additional Notes for Report Preparation

• When looking at growth rates and changes in numbers, discuss the changes in numbers using the compound annual growth rate (CAGR) instead of simple percentage changes. The formula is:

$$CAGR = \left( \frac{FV}{PV} \right)^{\frac{1}{n}} - 1$$

where:

FV = future value;
PV = present value; and
n = # of years

• Ideally you want to go three years back and three years forward from most recent period in which financial data is available.

• Use calendar years to standardize the data, not accounting years, when companies have different ends of fiscal years. Comparing accounting years to accounting years is an apples to oranges comparison for some firms/industries.

• Always respond to the “why” when presenting data or facts; e.g., what decisions or actions led to this.

• Include implications for competitive advantage ICAs and always ask and answer the same two questions. 1) Which firm(s), if any, has the competitive advantage in this industry, and what specifically is the basis of that competitive advantage?” If the firm with the competitive advantage is your firm, then you explain “how does the firm maintain this competitive advantage against its competitors?” 2) If the firm with the competitive advantage is not your firm, then you explain “what does the firm need to do to improve against the firm(s) with the competitive advantage?”

• Assess your company’s and ideally it’s two (2) primary competitors’ most recent years’ 10-K reports (2 or 3 years, depending on availability) and subsequent 10-Q reports, plus any other pertinent SEC filing documents. Also, you will find data sources such as The Value Line Investment Survey, Standard and Poor’s Industry Surveys, Standard & Poor’s Research Insight, Standard and Poor’s Register of Corporations, etc. helpful in gathering data for your analysis.
• In your situation analysis, use multiple strategic tools for your analysis; e.g., 5 forces, STEEP, cultural assessment, etc or other tools that were discussed in our text and readings.
• Make sure you do not use partial tools—use the tool completely. For example, a 5-Forces analysis needs to explicitly think about all 5 forces, and a cultural assessment needs to consider all three criteria. Each reading will give you the complete method for using the tool correctly.
• When trying to decide whether a tool is an internal or an external tool, think about the following:
  o Internal tools (pure): designed to look at/assess only a single firm, regardless of the actions of other firms, or other firms are only incidental to the tool’s use. An example of this would be a cultural assessment;
  o External tools (pure): designed to understand an industry or its dynamics, and from the tool’s perspective, knowledge of individual firms is not necessary, or is only incidental to the tools use. An example of this would be a 5-Forces analysis; and
  o External tools (geared toward directly assessing competition and/or competitors): designed to explicitly compare two or more firms, often on competitive issues—tool cannot be properly used unless direct knowledge of two or more firms is used. An example of this would be a value chain analysis.
• Make sure each tool ends with an analysis of the implications for competitive advantage (ICA).
• Be sure to use current sources such as Business Week, Wall Street Journal, Financial Times, etc in better understanding your company, its competitors and industry.
• Don’t forget to include an assessment of the leadership and culture of your firm
• Don’t worry about the length of the report – focus on responding to all items needed!

Picking a Company & Industry to Analyze

I highly recommend that you pick your company wisely. If you discover that you have not chosen well, and need to change companies, the amount of work to play catch-up is often extraordinary. So, I suggest that your choices should fall within the broad limits listed below (though if they do not, I will not prevent you from picking the company, but this will make your task exponentially more difficult):

• Your company should all be U.S.-based, publicly traded firms, preferably NYSE or NASDAQ listed;
• Your company should be fairly focused businesses, e.g., they should not be broadly diversified or conglomerates such as General Electric (GE is a great company, but its scale of operations makes it incredibly difficult to analyze well in a 15 week semester), and the vast majority, say 70%+, of each firm’s revenues should come from one business or closely related lines of businesses;
• Check to make sure that your company have adequate information available; many times the top two companies will have LOTS of information and the third competitor will be almost invisible to the business and financial press;
• Make sure your company has public information going back at least 3 years; some Internet firms or recently merged firms do not have the necessary data for conducting a good analysis.
• Ideally do not pick a firm to analyze that you currently or previously have worked for (consult with your instructor before picking your company if you have any questions).
• If you do some basic research on your companies that matches the guidelines above, you will more than likely save yourself many potential problems later.
• Use the resources of the FGCU library and if needed the FGCU Business Liberian.
Paper Mechanics

- The company report requires you to conduct considerable outside research to be current on what is happening with your company. Any complete analysis will always use both the “hard” (i.e., numbers-oriented) and the “soft” (i.e., management-oriented) analytic tools. Also, the following rules apply to all your analyses:
  - Your writing style should represent an “individual consultant’s report” to the organization’s senior management team—clear, focused, and concise.
  - Use a standard font and type size (Times or Times New Roman at a 12 point size), double-spacing, and standard 1” margins.
  - Use page numbers.
  - Use headings and subheadings.
  - Case analyses are formal documents. Do not use abbreviations or contractions.
  - Although you can exceed the recommended page limit, try to be concise and avoid brevity.
  - Spelling and grammar errors can lead to a lowering of grade (make sure you read your report over closely before you turn it in).
  - Use APA citation method, cite extensively, and build your bibliography page accurately. The basic structure of the APA citation method is (Author’s last name, year) or (Author’s last name, year, page #) when using a direct quote. The general rule for citing material is “if it is not common knowledge, make a suitable citation,” or “when in doubt, cite it.” Generally, footnotes are not used in the APA format. Your bibliography page will be in the APA published format. The APA Style Manual is listed on the first page of the course syllabus, along with a link to the APA Web pages that give a quick overview of citation and reference methods. If you are still uncomfortable with preparing a paper in APA format, there are some software tools available to help you. I do not recommend any particular software or product on this list, and there may be others available; this is simply of software that I know about. As always, you are ultimately responsible for correctly following the APA guidelines:
    - EndNote (http://www.endnote.com/), available for about $100 (academic price);
    - ProCite (http://www.procite.com/), is also available for about ($100 academic price);
    - APA Style Helper (http://www.apastyle.org/stylehelper/), direct from the APA, download price is about $35.00;
    - APA Referencing Macros for MS Word (http://www.southernoceansoftware.com/products.html), download price is roughly $20; and
    - Reference Point Software (http://www.charm.net/~rps/), MS Word macros/templates, download price is about $30.
  - In addition, Google has a great resource list at: http://directory.google.com/Top/Arts/Writers_Resources/Non-Fiction/Research_Papers/Citation_Guides/?tc=1):
    - Do not plagiarize. If you do not know Florida Gulf Coast University’s policy concerning plagiarism, look it up.
    - Your primary emphasis for all the analyses is the entire organization and all its separate businesses.
    - All work must be sent as one integrated document ready to be opened and printed. Work submitted in multiple pieces will not be accepted and will be treated as late work (pp can be send separately but written paper should be in one document).