FLORIDA GULF COAST UNIVERSITY
Lutgert College of Business
Department of Management

GEB 4890
BUSINESS STRATEGY

Fall 2016

CRN: 80873

Date/Time: Tuesday/Thursday: 1:30-2:45pm
Room: LH 1204

Dr. ARTHUR J. RUBENS
Professor of Management
Department of Management
Fall 2016
SYLLABUS

FACULTY

Instructor: Dr. Arthur J. Rubens
Contact Info:
Room: LCOB, Room 3310
Phone: 590-7840
Fax: 590-7367
E-mail: arubens@fgcu.edu
Office Hours: Tuesday and Thursday: 2:45-5:15pm and 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. 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, and Associate Director of the Regional Economic Research Institute.

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.
COURSE CATALOG DISCRIPTION
Senior level capstone experience requiring student teams to analyze and implement solutions to complex business problems and opportunities. Students are required to incorporate knowledge acquired in all areas of their College of Business course of study in actual business situations. (Senior standing and advisor permit required)

Prerequisite(s): MAN 3025 for level UG with min. grade of C and MAR 3023 for level UG with min. grade of C and FIN 3403 for level UG with min. grade of C

COURSE DESCRIPTION
This capstone course focuses on the process of strategic management in organizations. This involves the evaluation of the organization’s situation, analysis and selection of strategic alternatives, and implementation and evaluation of the strategic plan. The course develops the student’s ability to work within a team (comprised of various business majors), as well as oral, written, and analytical skills. The course presents conceptual information through readings, lectures, a business game simulation, team presentations, and other class activities. The analysis of case studies of actual business situations including international, nonprofit, manufacturing, and service industries will serve as a means of applying the course concepts and develop the students’ ability to integrate business concepts. The course requires the students to utilize information from a variety of business areas covered in the Business Core including: Accounting, Information Systems, Finance, Marketing, and Management.

Course Topics
The Course will be divided into several defined sections: Knowing and Understanding Strategy, External and Internal Analysis, Strategy Formulation, and Strategy Implementation, Control, and Execution. List of relevant course topics area:

- What is strategy?
- The process of strategic management
- Evaluating the external environment
- Analyzing a company’s resources and competitive position
- Generic competitive and organizational strategies
- Strategic decision-making
- International strategies
- Tailoring strategy to the industry and situation
- Corporate strategy and diversification
- Strategy, ethics, social responsibility and sustainability
- Building organizational capabilities for implementation
- Corporate culture and leadership
- Current issues in strategy
**Credit Hours**
For each credit of a class, you should expect to spend one hour in class and an average of two – three hours preparing outside of class each week. Therefore, since this is a three-credit class, you should plan to devote an average of 9 to 12 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.

**Management Department Mission Statement**
The department of management creates an environment that enables students to develop managerial knowledge and leadership skills, both individually and collaboratively, to: (1) recognize, evaluate, and cultivate business opportunities; (2) identify, understand, and implement positive solutions to organizational issues; and (3) build leadership capabilities to effectively manage organizational change in the global environment.

<table>
<thead>
<tr>
<th>Learning Goal &amp; Learning Objective. BBA Graduates will:</th>
<th>Learning Objective MAN graduates will:</th>
<th>Course Learning Objectives (Measureable)</th>
<th>Assessment(s) Used to Measure Outcomes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand the business Environment</td>
<td>• Analyze ethical issues as they apply to management.</td>
<td>Identify and describe the complexities of strategically managing a corporation in the global business environment.</td>
<td>I, II, III, IV, V, VI, VII</td>
</tr>
<tr>
<td>• Demonstrate knowledge of ethical Issues.</td>
<td>• Propose solutions to business problems in a global environment.</td>
<td>Apply knowledge of diverse demographics in a global economy to make effective business decisions.</td>
<td></td>
</tr>
<tr>
<td>• Demonstrate knowledge of global factors influencing business.</td>
<td>• Explain the importance of environmental responsibilities.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Be effective Problem solvers

- Solve business problems using analytical tools.

### Be effective Communicators

- Deliver effective oral presentations.
- Prepare effective written reports.

### Have interdisciplinary business Knowledge

- Understand main concepts & definitions in accounting, economics, finance, information systems, management, marketing, and operations management.
- Integrate knowledge across disciplines.

<table>
<thead>
<tr>
<th>EVALUATION ASSESSMENT</th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
<th>V</th>
<th>VI</th>
<th>VII</th>
<th>VIII</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Strategy Game 3-Year Strategic Plan</td>
<td>Team Case Analyses/Presentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Strategy Game Computer Simulation</td>
<td>Exam 1 (Chapters 1-6 of text)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Strategy Game Annual Report/ Presentation</td>
<td>Exam 2 (Chapters 7-12 of text)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BSG Strategy Game quizzes</td>
<td>Class Participation &amp; Homework</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AOL/AACSB Writing Assignment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### TEACHING METHODS & LEARNING STRATEGIES

Course will be conducted as a seminar, which will include instructor presentation, class and e-mail participation, individual and group exercises, case analysis, individual research, and individual and group presentation. The first part of most classes will use a traditional learning strategy of instructor presentation and class participation. The second part of each class will use exercises, cases studies, class discussion, and class presentation.

Learning strategies will be student focused, using both self-directed and group interaction. Students will be encouraged to apply his/her own professional experiences and perspectives to support and reinforce class material, class debates, and in-class and e-mail discussion.
**TEXTS AND READINGS**


3. Select Readings/Cases (posted to Canvas Course Learning Page)
   - Other Reading or Short Cases as assigned.

Optional


*Supplementary reading material:* To achieve an optimal learning experience and to facilitate class discussions, it will be useful to read newspapers and magazines related to the field of strategic management, such as (available at the library*):

- The Financial Times
- The Wall Street Journal
- Fortune
- The Economist
- Business Week
- Other business periodicals

**Note:** Each class will begin with “What’s New in Strategy”. It is expected that students will peruse newspaper and other mediums and bring in current topics on business strategy for classroom discussion.

*Refer to University Policy and Procedures Sections of this Syllabus for instructions on how to access Newspapers, magazines and other business periodicals from the FGCU Library.*
COURSE REQUIREMENTS

CASE ANALYSES

Cases provide you with the opportunity to analyze real world situations and then make specific recommendations on how best to address these issues. We will be exploring several cases during the semester. You should diligently review assigned case studies for class discussions. In addition, questions from the case study will be asked on exam 1 and 2. For your case analysis, students, as part of their student teams, will prepare a case presentation. Below is brief overview of this assignment:

Working with your assigned BSG Teams, student teams will be assigned a case study from the text book to present to class. Assignment of the case study will be given the 2nd class session. From this, student teams will prepare a pp presentation of the case which will be presented to the class on the date the case is due. For this assignment, it is expected that assigned student teams will assume the role of a “Consulting Team” that has been employed to assess the company’s overall situation and recommend a set of actions to improve the company’s future prospects. In addition, BSG teams will generate discussion among his/her students of the issues regarding the case and respond to student's comments and commentaries. In short the student team members will serve as "presenter" of case issues/topics/recommendations, and "instructor/facilitator" for the case discussion. In addition, all student teams will develop at least 4 multiple choice questions from their assigned case study.

The pp for the presentation and the multiple choice questions (with answer key) from the case will be given to the instructor “prior” the presentation of the case study. Students will be evaluated on quality of PP and their presentation to the class.

- Refer to class schedule in the syllabus for date that case will be discussed
- Refer to Appendix one for case study questions and general instructions for team case presentation

BUSINESS STRATEGY GAME (BSG GAME)

Computer Simulation
The Business Strategy Game computer simulation (http://www.bsg-online.com/) is a central part of this course. It involves you and your teammates (groups of 4 or 5 students) running a company within an industry (the athletic footwear industry) for a number of years (or decisions). Your team will be in direct competition with other teams in the class. You will play the game for a minimum of 5 years (decisions) and potentially a maximum of 10 years (decisions).

Annual Report/Presentation
After the game is completed, you and your teammates will present your results in an annual report at the end of the semester. The report will consist of both written and oral components. The written portion of the report should resemble a typical corporate annual report. It is expected that the report will be 15 single-spaced pages in length
which does not include cover page, table of contents, and any additional appendices, exhibits, and bibliography. The oral team presentation of the final report should be approximately 11-15 minutes long and be structured as a report to management. It must be presented using the highest standards of professionalism. Please see the handout “GEB 4890 Annual Report and Presentation” found in our Canvas Course Website for more details on this assignment.

**Three Year Strategic Plan**
Teams will complete the in-game strategic plan after submitting their decisions for year 13. The strategic plan will focus on years 14-16. Details about the strategic plan are available within the Business Strategy Game.

**Quizzes**
Two quizzes will be taken as part of the BSG Game. The first quiz measures your understanding of Rules of the Game, and the second quiz assesses your understanding of making decisions in the game.

**TEAMS AND TEAM-WORKING**
A large percent of your course grade is determined through materials that you produce as part of a team. Teammates are expected to contribute fully to the process of team activities. To support this goal, teams will practice self-evaluation and self-management.

**Self-Evaluation**
Self-evaluation means that team members will formally evaluate their teammates’ participation in the team process over the course of the semester. This will be achieved through the submission of a formal written evaluation by each team member of his/her teammates periodically during the semester and completion of BSG Co-Manager Evaluation concurrent with the submission of the Business Strategy Game Annual Report. Failure by any student to submit appropriate written evaluations is equivalent to not submitting a required work assignment and will result in the student receiving a grade of 0 for all this activity. Please note, however, unlike other assignments, there will not be an opportunity to submit a late evaluation, as it would entail a delay in the processing of team grades.

Teams must remember that it is their responsibility to manage internal dynamics: from workload assignment, coordination of activities, to general team operations. If a team is unable to manage itself or a member, there exists a formal policy for removing a member from the team (see the self-management paragraph below); however, teams that are having internal management problems are strongly encouraged to solve them within the team and in informal discussions with the instructor before beginning the formal process of removing a member from the team.
Self-Management
Self-management means that teams have the right to drop team members that are not performing satisfactorily within the team. This will occur through a two-step process. First, the entire team must formally meet with the instructor to discuss and attempt to overcome the problem (please note: the informal meeting with the professor described in the self-management paragraph above is not a prerequisite for this formal meeting; however, it is strongly encouraged and will lend credence to a team’s concerns about a teammate. I can imagine many situations where the informal meeting may not occur, such as where the team member’s work quality or participation in the team process is so poor from the start that immediate action is desired, or the team member cannot or will not informally meet or discuss his/her perceived problems within the team).

If the formal meeting still does not rectify the problem, the team has the right to drop the member from the team (again, pending the instructor’s agreement, as with all team composition decisions). The member who has been dropped from the team must find another team willing to accept his/her membership. Failure to join another team will result in the dropped member failing the course with a grade of 0.

Refer to Appendix Two for more information

EXAMS:
Two exams will be given from course material including text, readings, lectures, and case studies. (To prepare for the exam it is recommended that you take the self-scoring chapter tests that are available on the course textbook publisher’s Web site at http://www.mhhe.com/thompson)

ASSURANCE OF LEARNING (AOL) WRITING ASSIGNMENT
A short writing assignment will be given to all students. The assignment is given as part of the Assurance of Learning process for the LCOB AACSB accreditation for the College. The assignment will assess the students writing skills and his/her ability to identify and integrate concepts. The specific instructions and due date for the assignment will be given to students at approximately the mid-point of the class.

PARTICIPATION:
Regular attendance and being prepared for class is mandatory and will be graded. Participation grade will include but not be limited to attendance, participation in class discussion and current news events, involvement in in-class activities, BSG Team activities, and homework as assigned. For more information on participation refer to Class and University Policy Sections for more information.

ETS Exam:
All students are required to take the ETS Exam (this is a mandatory requirement for graduation). Each student must individually schedule a time during the semester to take the Examination. For more information on scheduling and taking the exam, contact LCOB Office of Advising and Student Affairs).
**FINAL GRADE: EVALUATION/WEIGHT**
Student’s final grade will be evaluated and based upon both individual (50%) and team efforts (50%). The course will be graded on the following weights:

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Team Assignments</em></td>
<td>50%</td>
</tr>
<tr>
<td>A) Business Strategy Game 3-Year Strategic Plan</td>
<td>3%</td>
</tr>
<tr>
<td>B) Business Strategy Game Computer Simulation</td>
<td>20%</td>
</tr>
<tr>
<td>C) Business Strategy Game Annual Report/Presentation</td>
<td>12%</td>
</tr>
<tr>
<td>D) Team Peer Evaluation (individually assessed)</td>
<td>5%</td>
</tr>
<tr>
<td>E) Team Case Study Presentation (individually assessed)</td>
<td>10%</td>
</tr>
<tr>
<td><em>(Approximate weight of each team assignment)</em></td>
<td></td>
</tr>
</tbody>
</table>

**Individual Assignments:**  
50%  
F) Business Strategy Quizzes (Quiz 1=2%; Quiz 2=3%)                       | 5%     |
G) Exam 1: Chapters 1-6 of text                                           | 15%    |
H) Exam 2: Chapters 7-12 of text                                         | 15%    |
I) Class Participation                                                    | 13%    |
   -Attendance, participation, and in-class assignments                    |        |
J) AACSB Integration and Writing Assessment Assignment                     | 2%     |

Total  
100%

**Grading Scale**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>93-100</td>
<td>83-86.9</td>
<td>73-76.9</td>
<td>&lt; than 59.9</td>
<td>59.9</td>
</tr>
<tr>
<td>A-</td>
<td>B-</td>
<td>C-</td>
<td>60-69.9</td>
<td>60-69.9</td>
</tr>
<tr>
<td>87-89.9</td>
<td>80-82.9</td>
<td>70-72.9</td>
<td>70-72.9</td>
<td>70-72.9</td>
</tr>
</tbody>
</table>

**Workload**

<table>
<thead>
<tr>
<th>Item Description</th>
<th>*Hrs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Meeting (minimum)</td>
<td>45</td>
</tr>
<tr>
<td>ETS Exam</td>
<td>3</td>
</tr>
<tr>
<td>Total Contact Hours</td>
<td>48</td>
</tr>
<tr>
<td>BSG Meetings and Final Report Preparation</td>
<td>60</td>
</tr>
<tr>
<td>Class preparation and Private Study</td>
<td>60</td>
</tr>
<tr>
<td>Exam Preparation</td>
<td>30</td>
</tr>
<tr>
<td>Total Non-Contact Hours</td>
<td>150</td>
</tr>
<tr>
<td><strong>TOTAL HOURS</strong></td>
<td>198</td>
</tr>
</tbody>
</table>

*Estimation of hours*
CLASS AND UNIVERSITY POLICY

Attendance Policy
Class attendance is expected and will be noted regularly.

Contact:
The best way to contact me is through email. You must check your FGCU email or you may not receive my emails that I send through Canvas. It is my policy to try to get back with you within 24 hours. Please note, although I try to, that I may not be able to always respond to emails on the weekend so if you need a quick response, please try and send me your questions during the week.

Class Participation
Participation points will be assigned for each class. It is expected that students actively contribute to classroom discussions and to a positive learning environment in the classroom. Students should be aware that a perfect attendance record is not sufficient to obtain a high mark for the 10% of the evaluation given to participation. Examples of behaviors that contribute to a high mark in class participation are:

- Active and interested involvement in classroom discussions
- Helpful and effective responses to questions and issues raised in class
- Contributions that help the learning of other students and the class as a whole
- Contributions that demonstrate good preparation for class and mastery of course material
- Assistance to the instructor in class activities when requested

Behaviors that will result in significant loss of participation marks include (but are not limited to):

- Regularly arriving late to class (and/or leaving early)
- Consistently failing to be involved in classroom discussions and activities
- Needless surfing of the Internet, instant or text messaging
- Disrespect for contributions made by other students
- Disruptive and distractive behaviors (e.g. side conversations and rudeness)
- Evident lack of preparation for class and classroom activities
- Failing to assist the instructor in maintaining a positive learning atmosphere in class

ALL students should have read and be prepared to discuss course topics, cases and other subject matter on the dates indicated in this syllabus. You are advised to get to know the instructor at an early stage. I really want to know you and your names. Photographs will be taken in an early class to ensure the instructor knows who you are. In addition, I will ask you to fill out a seating chart and remain in the same seat for the rest of the class so I can better learn your names. Finally, I might ask you to write your name on a “tent card” and bring it with you to each class.
Grading of participation will be discussed further in an early class, however, some general principles include:

- Pay Attention to what you are told
- Attend the early classes when participation is discussed. Pay attention to what is said in class and READ the information in this syllabus and in other handouts you will be given in class or on CANVAS.
- Ask for help if you need it. If you are unsure about the effectiveness of your classroom participation then you should consult the instructor in person, in office hours, as soon as possible.
- Come to class prepared. All students are expected to come to class prepared for class review and team discussion cases as shown on the syllabus.

**Computer and Internet Policy**
This class requires your full attention and participation. It is my policy to allow use of laptops in class **ONLY WITH THE WIRELESS FACILITY TURNED OFF**. The only permitted exception is when you are instructed otherwise as a part of in class activities. You are not allowed to use in-class telephone/PDA text, instant or email messaging under any circumstances. You have plenty of time outside class for such activities – don’t waste time in-class.

I regard surfing of the Internet, text messaging, etc while class as in session, equivalent to openly reading a newspaper or magazine or holding a cell phone telephone conversation in class. Therefore, I consider such behaviors both distracting to the learning of other students (as well as yourself) and discourteous to the class and to the instructor. Please be aware such behaviors are not only against my policy but will lose you significant participation marks.

**Make-Up Exams**
Make-ups for exams will NOT normally be given. The only exception will be well-documented SERIOUS emergency, natural disaster, or serious illness of the student or close family member. In relevant cases physician’s confirmation will be required. Make-ups will absolutely NOT be given because the date of exam happen to clash with student’s travel plans, sports activities or regular work schedules. ALL requests for make-ups will need to be thoroughly documented.

**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.”
The FGCU Student Guidebook is available online at [http://studentservices.fgcu.edu/judicialaffairs/new.html](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 team will be turned over to Judicial Affairs. In addition, you are responsible for your team members. If anyone in your team is caught plagiarizing, then the whole team 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

University Non-Discrimination Statement:
Florida Gulf Coast University is committed to ensuring equity and fairness for all University employees, students, visitors, vendors, contractors and other third parties. As such, the University prohibits discrimination on the bases of race, color, national origin, ethnicity, religion, age, disability, sex (including sexual harassment/assault), gender identity/expression, marital status, sexual orientation, veteran status or genetic predisposition with regard to admissions, employment, programs or other activities operated by the University. This prohibition extends to enforcement of Title IX of the Education Amendments of 1972. Questions or complaints should be directed to the Office of Institutional Equity and Compliance (OIEC). The OIEC’s phone number is (239)745-4366; the OIEC email address is OIEC@fgcu.edu.

Video and Audio Taping of Class Lectures
Audio or Video Taping of class lectures is prohibited unless students has 1) expressed consent from class instructor to tape class lecture or 2) has a documented disability and who has signed approval from the Office of Adaptive Services (OAS) that audio or video taping of class lectures is a reasonable accommodation.

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.”

**Center for Academic Achievement**
The Center for Academic Achievement (CAA) provides academic support services to all FGCU students. Students can take advantage of our free peer tutoring and Supplemental Instruction sessions for lower-level math and science courses, as well as workshops to facilitate the development of skills necessary for college success. If you would like to participate in any of our programs, learn about tutoring services, or meet with an Academic Retention Coordinator, please visit the CAA in Library 103 or call us at (239) 590-7906. The website for CAA is [www.fgcu.edu/caa](http://www.fgcu.edu/caa).

**Resources for Faculty General Education**
Information on General Education program requirements is available online at [http://www.fgcu.edu/General_Education/index.html](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/](http://www.fgcu.edu/Connect/)

**Distance-Learning:** Information on distance learning courses is available online at [http://itech.fgcu.edu/distance/](http://itech.fgcu.edu/distance/)

**Online Tutorials:** Information on online tutorials to assist students is available online at [http://www.fgcu.edu/support/](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](http://elearning.fgcu.edu/frames.aspx) and [http://elearning.fgcu.edu/section/default.asp?id=xxxDemoOnlineCourseStudent](http://elearning.fgcu.edu/section/default.asp?id=xxxDemoOnlineCourseStudent)

**Library Resources**
Main page: [http://library.fgcu.edu/](http://library.fgcu.edu/)
Tutorials & Handouts: [http://library.fgcu.edu/RSD/Instruction/tutorials.htm](http://library.fgcu.edu/RSD/Instruction/tutorials.htm)
Faculty Support: [http://library.fgcu.edu/faculty_index.html](http://library.fgcu.edu/faculty_index.html)
Contact Us: [http://library.fgcu.edu/LBS/about/contactus.htm](http://library.fgcu.edu/LBS/about/contactus.htm)

**Business Librarian**
Regina Beard, MLS
Associate Librarian/ Business Librarian
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965-6565
Phone: (239) 745-4372
Fax: (239) 590-7609
Email: rmbeard@fgcu.edu
Business Journal Databases, Industry Databases, and Current Business Newspapers and Periodicals
FGCU has numerous Databases to access business journals and industry. You can access numerous research guides through the link on FGCU’s library homepage called “Research Guides” and then select Business. You can also access all of the business databases by clicking on the “Databases” link on the library homepage and selecting “Business & Industry” (http://library.fgcu.edu/).

Newspapers, Magazines, and other periodicals on Business Topics
Sample Instructions to access Wall Street Journal (WSJ) from FGCU Library:

Video Instructions: http://www.screencast.com/t/RgCg500Dj

General Instructions:
- From the homepage: http://library.fgcu.edu/index.html
- click Library catalog and enter Wall Street Journal
- look for The Wall Street Journal and this icon 📡
- click the appropriate title, then look for a link that says Connect Now
- You should see a page that looks like this:

![Wall Street Journal Database Access](image)

- This screen indicates which database includes the Wall Street Journal. Click any of them for access.
- Conduct your search

If you wish to access the Financial Times, you can go to the below listed link to access this publication.
http://ze7cm3rw7t.search.serialssolutions.com/?V=1.0&N=100&L=ZE7CM3RW7T&S=ACT_B&C=financial+times

Other business magazines and periodicals such as Economist, Bloomberg Business Week, etc, can all be accessed through FGCU’s Library databases by following the above directions.
<table>
<thead>
<tr>
<th>Wk No.</th>
<th>Class Week Date</th>
<th>Topic/Assignments</th>
<th>Cases/Readings</th>
<th>Assignments Due</th>
<th>BSG Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aug 18-21</td>
<td><strong>Introduction to Class and Strategy</strong>&lt;br&gt;Introduction to Class/Syllabus&lt;br&gt;Class Introduction/Team Formation &amp; Assignment</td>
<td>-Syllabus</td>
<td></td>
<td>BSG Teams Assigned (Tentative)</td>
</tr>
<tr>
<td></td>
<td>Aug 18</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 19</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 22</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 23</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Aug 22-28</td>
<td><strong>What is Strategy and BSG Game</strong>&lt;br&gt;What is Strategy&lt;br&gt;BSG Players Guide&lt;br&gt;#3 Whole Foods Case Study</td>
<td>-Chapter 1: What is Strategy&lt;br&gt;-Player’s Guide for Business Strategy Game (<a href="http://www.bsg-online.com/">http://www.bsg-online.com/</a>) or Canvas,&lt;br&gt;-HBR: Stark, “Hard Ball”&lt;br&gt;-HBR: What is Strategy&lt;br&gt;-Case Study: #3 Whole Foods&lt;br&gt;- Guide to Case Analysis, (available at ww.mhhe.com/thompson) and on CANVAS</td>
<td>Whole Foods Case Study (Class Discussion)</td>
<td>BSG Teams (Finalized)</td>
</tr>
<tr>
<td></td>
<td>Aug 23</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 26</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 27</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 28</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 29</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aug 29-Sept 4</td>
<td><strong>Strategy Process</strong>&lt;br&gt;Charting a Company’s Direction: Vision and Mission, Objectives and Strategy&lt;br&gt;Robin Hood Case Study (#23)</td>
<td>-Chapter 2: Charting a Company’s Direction: Vision and Mission, Objectives and Strategy&lt;br&gt;-Case: #23: Robin Hood</td>
<td>Robin Hood Case Study (Class/Homework)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aug 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 8</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Sept 5-11</td>
<td><strong>External/Internal Analysis</strong>&lt;br&gt;External Environment&lt;br&gt;Five Force Analysis&lt;br&gt;Strategic Tools</td>
<td>-Chapter 3: Evaluating a Company's External Environment&lt;br&gt;-Chapter 4: Evaluating a Company's Resources and Competitive Position&lt;br&gt;-HBR: Porter’s, Five Forces</td>
<td></td>
<td>BSG Quiz Opens Tuesday: Noon</td>
</tr>
<tr>
<td></td>
<td>Sept 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 8</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 9</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 13</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Sept 12-18</td>
<td><strong>Strategic Choices</strong>&lt;br&gt;The Five Generic Competitive Strategies: Which One to Employ?&lt;br&gt;Lululemon Case Study (#6)&lt;br&gt;1st BSG Practice Session Reviewed</td>
<td>-Chapter 5: The Five Generic Competitive Strategies: Which One to Employ?&lt;br&gt;Read HBR article: Porter, Five Forces</td>
<td>Lululemon Case (Team:_______)</td>
<td>BSG Quiz Due: Tuesday: Noon</td>
</tr>
<tr>
<td></td>
<td>Sept 13</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 16</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 18</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 19</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 22</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 23</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wk No.</td>
<td>Class Week Date</td>
<td>Topic/Assignments</td>
<td>Cases/Readings</td>
<td>Assignments Due</td>
<td>BSG Assignment</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------</td>
<td>-----------------------------------</td>
<td>---------------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>6</td>
<td>Sept 19-25</td>
<td><strong>Case Study/BSG Reset</strong></td>
<td>-Case Study 10: Chipotle</td>
<td>Chipotle Case Study</td>
<td>BSG Data Reset: Monday, 11:59pm</td>
</tr>
<tr>
<td></td>
<td>Sept 20</td>
<td>Chipotle Case Study (#10) Presented</td>
<td>-Case Study 17: Tesla</td>
<td>(Team:______)</td>
<td>BSG activity #2: Launching Your Firm: Thursday, 11:59pm</td>
</tr>
<tr>
<td></td>
<td>Sept 22</td>
<td>Tesla Case Study (#17) Presented</td>
<td>Work on BSG Activity and Decision</td>
<td>Tesla Case Study (Team:______)</td>
<td>1st Simulation Decision Due: Sunday, 11:59 pm - Year 11</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Strategy Development</strong></td>
<td>-Chapter 6: Strengthening a Company’s Competitive Position</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Sept 26-Oct 2</td>
<td><strong>Strategy Development</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 27</td>
<td>Competitive Positioning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sept 29</td>
<td>Exam Review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work on BSG Activity/Game</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Oct 3-9</td>
<td><strong>Exam &amp; Corporate Strategy, and Diversification</strong></td>
<td>-Chapter 8: Diversification and the Multi-Business Company</td>
<td>Exam 1 (Chap 1-6)</td>
<td>BSG Quiz 2 Due: Thursday, Noon</td>
</tr>
<tr>
<td></td>
<td>Oct 4</td>
<td><strong>Exam 1:</strong> Chapters 1-6</td>
<td></td>
<td>Tuesday (Beginning of Class)</td>
<td>2nd Simulation Decision Due: Sunday, 11:59pm - Year 12</td>
</tr>
<tr>
<td></td>
<td>Oct 6</td>
<td>Diversification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>BSG Quiz 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>International Strategy</strong></td>
<td><strong>Exam 1:</strong> Diversification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Oct 10-16</td>
<td><strong>International Strategy</strong></td>
<td>-Chapter 7: Strategies for Competing in International Markets</td>
<td>Tata Motors Case (Team:_________)</td>
<td>BSG Activity #4: Exploring International and Implementation Issues: Thursday, 11:59pm</td>
</tr>
<tr>
<td></td>
<td>Oct 11</td>
<td>Globalization/International</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oct 16</td>
<td>Competing inIntl Mkts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tata Case Study (#18)</strong></td>
<td><strong>Case Study #18, Tata Motors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tata Motors Case</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Team:_________)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wk No.</td>
<td>Class Week Date</td>
<td>Topic/Assignments</td>
<td>Cases/Readings</td>
<td>Assignments Due</td>
<td>BSG Assignment</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------</td>
<td>-------------------</td>
<td>----------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>10</td>
<td>Oct 17-23</td>
<td><strong>Strategic Mgt/Execution</strong>&lt;br&gt;Strategy Execution&lt;br&gt;Balance Scorecard&lt;br&gt;#20 Wal-Mart in Africa</td>
<td>-Chapter 10: Quality: Building an Organization Capable of Good Strategy Execution&lt;br&gt;-Chapter 11: Managing Internal Operations&lt;br&gt;-HBR, Norton/Kaplan, Balance Scorecard</td>
<td>Walmart Case&lt;br&gt;(Team:______)&lt;br&gt;AOL Assignment Due Thursday, beginning of Class</td>
<td>5th Simulation Decision Due: Sunday, 11:59pm - Year 15</td>
</tr>
<tr>
<td>12</td>
<td>Oct 24-31</td>
<td><strong>Ethics and CSR</strong>&lt;br&gt;Ethics&lt;br&gt;Corporate Social Responsibility&lt;br&gt;Case Study: #27, Ritz Carlton</td>
<td>-Chapter 9: Ethics and CSR&lt;br&gt;Read: CSR: Creating Shared Values</td>
<td>Ritz Carlton Case&lt;br&gt;(Team:______)</td>
<td>6th Simulation Decision Due: Sunday, 11:59pm - Year 16</td>
</tr>
<tr>
<td>13</td>
<td>Nov 1-6</td>
<td><strong>Corporate Culture/Strategy Execution</strong>&lt;br&gt;Corporate Culture&lt;br&gt;Leadership&lt;br&gt;Exam 2 Review</td>
<td>-Chapter 12: Corporate Culture and Leadership-Strategy Execution</td>
<td></td>
<td>7th Simulation Decision Due: Tuesday, 11:59pm - Year 15</td>
</tr>
<tr>
<td></td>
<td>Nov 8</td>
<td><strong>Exam 2</strong>&lt;br&gt;Chapters 7-12&lt;br&gt;BSG Team Work&lt;br&gt;Class Activity</td>
<td></td>
<td>Exam 2: Chap 7-12&lt;br&gt;Tuesday (Beginning of Class)</td>
<td>8th Simulation Decision Due: Sunday, 11:59pm - Year 16</td>
</tr>
<tr>
<td></td>
<td>Nov 10</td>
<td>BSG Team Paper Preparation</td>
<td></td>
<td></td>
<td>9th Simulation Decision Due Tuesday, 11:59 pm Year 19</td>
</tr>
<tr>
<td></td>
<td>Nov 15</td>
<td>BSG Team Paper Preparation</td>
<td></td>
<td></td>
<td>10th Simulation Decision Due Sunday, 11:59pm Year 20</td>
</tr>
<tr>
<td>15</td>
<td>Nov 14-20</td>
<td>BSG Team Paper Preparation</td>
<td>Thanksgiving Holiday Break</td>
<td>BSG Team Paper Due&lt;br&gt;Due in Canvas/Class&lt;br&gt;Tuesday, Noon</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Nov 21-27</td>
<td>BSG Team Paper Preparation&lt;br&gt;HOLIDAY: Thanksgiving</td>
<td>BSG Team Assessment Due&lt;br&gt;Due in BSG Game&lt;br&gt;Tuesday, Noon</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Nov 28-Dec 1</td>
<td><strong>Final Assignments Due</strong>&lt;br&gt;Team Presentation&lt;br&gt;Tuesday: Teams A, B, C&lt;br&gt;Thursday: Teams D, E, F&lt;br&gt;Course Recap</td>
<td>Final Paper/PP must be submitted to Canvas Dropbox&lt;br&gt;Tuesday by Noon.&lt;br&gt;Also, all teams must bring Hard Copy of Report and PP to Class for instructor.</td>
<td>BSG Team Paper Due&lt;br&gt;Due in Canvas/Class&lt;br&gt;Tuesday, Noon</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Dec 5-9</td>
<td><strong>Final Examination Week</strong>&lt;br&gt;(ETS Exam must be completed)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*The syllabus and course schedule may be modified at the discretion of the instructor.*
Appendix One

BSG TEAM CASE STUDY PRESENTATION/QUESTIONS*

As part of your case study assignment, each BSG team has been assigned a case study to discuss in class. The BSG team will serve as “lead discussant(s)” for the case. As “lead discussant” student teams will present the case study and generate discussion among your students on the issues regarding the case. The case study questions can serve as a general guide to present a presentation of the case. Generally the case study presentation consists of 20 – 25 minutes for presentation and 5-10 minutes for questions and answers. Also, as part of the assignment, students will develop 4-6 multiple choice questions for the assigned case.

Below are the list of the case study questions. In your presentation, you should assume the role of a “Consulting Team” that has been employed to assess the company’s overall situation and recommend a set of actions to improve the company’s future prospects. Therefore, teams don’t have to answer all questions in their presentations (questions serve as guide to presentation of key issues and concepts) – your role and responsibilities for this assignment is to present the issues of the case, assess the overall situation, provide recommendations and solutions, and very importantly to generate discussion among the students of the pertinent issues found in the case.

Case 3: Whole Foods Market 2014

1. What are the chief elements of the strategy that Whole Foods Market is pursuing?

2. Is Whole Foods’ strategy well matched to market conditions in the food retailing industry (one of the criteria for a winning strategy discussed in Chapter 1)?

3. Do you think John Mackey has a good strategic vision for Whole Foods? Why or why not? What do you like/dislike about the company’s mission “to promote the vitality and well-being of all individuals by supplying the highest quality, most wholesome foods available?”

4. Do Whole Foods Market’s core values as presented in case Exhibit 2 really matter? Are they “real” or just cosmetic window dressing? What evidence can you cite to support your answer? Have Whole Foods’ core values contributed to the company’s success? Why or why not?

5. Based on the financial statement data in case Exhibit 1, how would you assess the company’s financial performance since 2009? Use the financial ratio information in Table 4.1 of Chapter 4 (pages 81-83) to assist you in calculating a revealing set of financial ratios and interpreting them.

6. Based on the store operations data in case Exhibits 3 and 4, how well is Whole Foods Market performing from a strategic perspective? Does Whole Foods enjoy a competitive advantage over its 3 chief rivals—The Fresh Market, Trader Joe’s, and Sprouts Farmers Market? Does the company have a winning strategy?

7. What recommendations would you make to John Mackey regarding the actions that Whole Foods’ management needs to take to sustain the company’s growth and financial performance?
Case 6: Lululemon Athletica, Inc.

1. How strong are the competitive forces confronting lululemon in the market for performance-based yoga and fitness apparel? Do a five-forces analysis to support your answer.

2. What does your strategic group map of the performance sports apparel industry look like? Is lululemon well positioned? Why or why not?

3. What do you see as the key success factors in the market for performance-based yoga and fitness apparel?

4. What does a SWOT analysis reveal about the overall attractiveness of lululemon’s situation?

5. What are the primary components of lululemon’s value chain?

6. What are the key elements of lululemon’s strategy? If you have previously covered the Under Armour case, what features of lululemon’s strategy stand out as being different from the strategy at Under Armour?

7. Which one of the five generic competitive strategies discussed in Chapter 5 most closely approximates the competitive approach that lululemon is employing?

8. What does the data in case Exhibit 1 reveal about lululemon’s financial and operating performance?

9. What 3–4 top priority issues do Christine Day and lululemon management need to address?

10. What recommendations would you make to lululemon CEO Christine Day? At a minimum, your recommendations should cover what to do about each of the top priority issues identified in question 9.

Case 10: Chipotle Mexican Grill 2014:

1. Does Chipotle Mexican Grill have any core competencies and, if so, what are they?

2. What does a SWOT analysis reveal about the attractiveness of Chipotle Mexican Grill’s situation and future prospects?

3. What are the primary and secondary components of Chipotle’s value chain?

4. What are the chief components of Chipotle’s strategy?

5. Which one of the five generic competitive strategies discussed in Chapter 5 most closely approximates the competitive approach that Chipotle Mexican Grill is employing?

6. What chief difference(s) do you see between Chipotle’s strategy and the strategy being employed at Moe’s Southwest Grill?

7. What does an analysis of the data in case Exhibit 1 reveal about Chipotle Mexican Grill’s financial and operating performance? Use the financial ratios in Table 4.1 of Chapter 4 as a guide in doing the calculations needed to arrive at an analysis-based answer to your assessment of Chipotle’s recent financial performance. In addition to the ratios in Table 4.1, there are
occasions when you will also need to calculate compound average growth rates (CAGR) for certain financial measures.

The formula for calculating CAGR (in percentage terms) is as follows:

\[ \text{CAGR \%} = \left( \frac{\text{ending value}}{\text{beginning value}} \right)^{\frac{1}{n}} - 1 \times 100 \]

(where \( n \) = the number of year-to-year or period-to-period changes)

8. How does Chipotle Mexican Grill’s competitive strength compare against that of Taco Bell, Qdoba Mexican Grill, and Moe’s Southwest Grill? Do a weighted competitive strength assessment using the methodology presented in Table 4.4 in Chapter 4 to support your answer. Based on your assessment and calculations, does Chipotle have a net competitive advantage over some or all of these rivals? Which rival—Chipotle Mexican Grill or Moe’s Southwest Grill or Qdoba Mexican Grill—seems to have the strongest set of resource strengths and competitive capabilities and is most likely to achieve the best financial performance? Does Chipotle have a good enough strategy and adequate resource strengths and competitive capabilities to compete effectively against Taco Bell?

9. What action recommendations would you make to CMG’s top executives to strengthen the company’s growth and profitability?

**Case 17: Tesla Motors**

1. What are the key elements of Tesla Motors’ strategy?

2. Which one of the five generic competitive strategies discussed in Chapter 5 most closely approximates the competitive approach that Tesla is employing?

3. Are you impressed by the strategy Elon Musk has crafted for Tesla? Why or why not?

4. What is your assessment of Tesla’s financial performance as shown in case Exhibit 1? Use the financial ratio information in Table 4.1 of Chapter 4 (pages 81–83) to assist you in calculating a revealing set of financial ratios and interpreting them.

5. What do we learn from the data in case Exhibit 2? Does the data provide additional valuable information? Why or why not?

6. What grade would you give Elon Musk for his handling of the battery pack fires and battery-charging fire in the residential garage of a Model S owner?

7. What are the issues/problems that Elon Musk and other members of Tesla’s top management team need to address?

8. What, if any, changes/adjustments in Tesla’s strategy would you recommend that Elon Musk consider?

9. What is your outlook for Tesla’s future performance and its prospects for revolutionizing the global automotive industry’s use of gasoline-powered engines versus battery-powered engines?
Case 18: Tata Motors: Can it become a Global Contender in the Automotive Industry
1. Describe the economic characteristics of the global motor vehicle industry.

2. What are the key success factors for a successful firm in the global motor vehicle industry?

3. What are Tata Motors’ internal strengths and weaknesses? Identify competencies and capabilities that the company’s major competitors are lacking. What market opportunities does the company have and what threats can you identify that may negatively impact the company’s future?

4. Would you describe Tata Motors international strategy as a global, transnational, or multidomestic strategy? Explain your answer.

5. What are the driving forces in the global motor vehicle industry?

6. What are the relative strengths of the five competitive forces affecting the global automobile industry.

7. What is the financial condition of Tata Motors as indicated from case Exhibits 3 and 4? What is its ability to meet short-term obligations? What advice can you offer to Tata’s management based on the information in the financial statement?

8. What do you consider to be the most important problems and issues facing Tata Motors, based on your analysis of company and the global motor vehicle industry? Prioritize these problems and issues beginning with the most important.

9. What actions would you suggest to the company’s management team to help Tata Motors sustain or improve its competitive position in the domestic market and global markets, and its long–term financial performance?

Case 24: Wal-Mart in Africa
1. How would you describe Wal-Mart’s international strategy leading up to its acquisition of Massmart in Africa? What has Wal-Mart learned from its experiences in Germany, Japan, and South Korea? What grade would you give Wal-Mart for its performance to date in diversification into international markets?

2. How should Wal-Mart resolve the tension between market pressures to localize its product offerings country by country and competitive pressures to lower costs? Explain.

3. Is there anything that Wal-Mart has done or is now doing in its drive to enter Africa and other international markets that could legitimately be considered as “unethical” by its stakeholders? Why or why not?

4. In what ways, if any, is Wal-Mart exercising corporate social responsibility? Are there any changes to its CSR strategy that you would suggest? If some shareholders complained that Wal-Mart has been spending too little or too much effort on corporate social responsibility, what would you tell them?

5. Is the current strategy for Wal-Mart producing good strategic and financial results? What are some key indicators of performance?
6. Should Wal-Mart adapt its business model to be better suited to local conditions in Africa? In what ways? What are the pros and cons?

7. How would you advise the company to proceed with implementing its entry into Africa? What options does Wal-Mart have on the table, and what option should be chosen?

**Case Study 27: Ritz Carlton**

1. Describe the culture of the Ritz-Carlton hotel organization. What are the key features of the culture?

2. Explain the Ritz-Carlton philosophy of selecting employees to build their capabilities for proficient strategy execution. How did the Ritz-Carlton get the “right kind” of employees? What attributes were required to work at the hotels?

3. Describe the first year experience for new employees at the Ritz-Carlton.

4. Evaluate the outcomes of the Ritz-Carlton’s Employee Training and Development initiatives.

5. Describe the Ritz-Carlton’s diversification strategy. Consider the lessons of Chapter 8. What type of diversification strategy did the company use? Why was this strategy particularly appealing?

6. As the Ritz-Carlton focused on global expansion, what did the company believe was its competitive advantage that would ensure success? How did the company approach globalization?

7. What recommendations can you make to the management of the Ritz-Carlton as the company pursues its global expansion?
APPENDIX TWO

Overview of the Business Strategy Game (BSG)

Registration
Every student must individually register for The Business Strategy Game (BSG) at the simulation Web site (http://www.bsg-online.com/). After BSG teams are selected the instructor will provide “company registration code” to each team to register. Below is the 5 steps necessary to fully register for the simulation using either a pre-paid simulation code or a credit/debit card.

1. Launch your web browser and go to http://www.bsg-online.com/.
2. Click the Students button at the top-left.
3. Enter your Company Registration Code. Make sure that you enter the Registration code for the team that you have been assigned. The company registration codes are:

<table>
<thead>
<tr>
<th>Company</th>
<th>Registration Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company A</td>
<td></td>
</tr>
<tr>
<td>Company B</td>
<td></td>
</tr>
<tr>
<td>Company C</td>
<td></td>
</tr>
<tr>
<td>Company D</td>
<td></td>
</tr>
<tr>
<td>Company E</td>
<td></td>
</tr>
<tr>
<td>Company F</td>
<td></td>
</tr>
</tbody>
</table>

4. Complete the brief registration form and click the Continue button at the bottom of the form.
5. Use a Pre-Paid Access Code
   On the next page, enter your Prepaid Access Code (PAC) and click the PAC Registration button. Your PAC can be found on the 3x5 card that came packaged with your text (assuming your instructor special-ordered a text-simulation package and you purchased the new text-simulation package from your campus book store).

   If you purchased a used text, then you should click the Credit Card Registration button. The registration fee is $42.95 and payment may be made using Visa, MasterCard, Discover, or American Express.

Use a Credit/Debit Card
   Then click the Credit/Debit Card Registration button on the next page. The registration fee is $42.95 for each team member. Have a credit/debit card ready. Payment may be made using Visa, MasterCard, Discover, or American Express. Should you not have a credit card, the easiest alternative is to use a teammate or friend's credit card to pay your registration fee and then reimburse him or her by cash or check.

Following registration, you will be directed to your Corporate Lobby page where you can view or download the Player's Guide, view or print the decision schedule, and browse through all the other information links explaining how BSG works. It is important you spend time reading these information links. It will take about 15 minutes.
**Simulation**
The Business Strategy Game (BSG) online simulation (http://www.bsg-online.com/) is a central part of this course. The simulation involves student teams (typically comprising of groups of 5 students, depending on class size) running a company within an industry (athletic footwear manufacturing) for a number of years (a.k.a. decisions). Each team will be in direct competition with other teams in the class. Students will play the game for multiple years (decisions) after playing 2 practice years (decisions). The Business Strategy Game Player’s Guide is available at http://www.bsg-online.com/ and on our Canvas course website in the BSG Folder. The help system online within The Business Strategy Game simulation (available at http://www.bsg-online.com/) is available and provides additional details.

**Individual Online Quizzes**
Students are required to independently and individually complete two timed online open book quizzes as part of The Business Strategy Game (see the “Course Schedule” portion of this syllabus for the time limits and due dates of these quizzes). These quizzes are administered through The Business Strategy Game Web site at http://www.bsg-online.com/. Sample quiz questions are available in the BSG Game.

**3-Year Strategic Plan**
Teams will complete the in-game strategic plan after submitting their decisions for year 14. The strategic plan will focus on years 15, 16 & 17. Details about the strategic plan are available online within The Business Strategy Game simulation (http://www.bsg-online.com/).

**Annual Report**
Teams will present their results in a written annual report after the simulation is completed. Please read the handout “Business Strategy Game Annual Report” on Canvas (http://canvas.fgcu.edu/) for more details on this assignment.