



Course Outline

MANAGEMENT AND ORGANIZATIONAL STUDIES 4410B STRATEGIC MANAGEMENT FOR MOS

Winter 2021

Course Meets: Thursdays 8:30a.m. to 11:00a.m. / Online Synchronous Via Zoom

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| Instructor: | Jan Klakurka |
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Course Scope and Mission

This course examines how organizations succeed in reaching their goals through design and implementation of novel approaches and techniques that generate competitive advantage. Success in the marketplace is achieved by a balancing of formal processes and spontaneous creativity of the people that make up the organization, which manifest in the form of true innovation. This course will practice traditional strategic analysis together with taking on the role of "futurist" in analyzing each case organization industry – where it is going, where it will end up, and what can be done to be on the top of each wave of innovation. Looking at strategy development and execution from a multi-dimensional perspective, this course will address the analyses and resulting decisions undertaken to capitalize on opportunities. The source of these opportunities will be revealed to be an optimization of firm people, processes, technologies, governance, and partnerships, operating with common objectives to lead in a competitive landscape today and tomorrow.

Course Prerequisites

1) Business 2257; and ; 2) Enrollment in 4th Year of BMOS degree programme, or ; permission of the Chair of MOS

(Please Note: Unless you have the prerequisites for this course, you may be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites).

Required Readings and Materials

Strategic Analysis and Action (9th Edition) Mary M. Crossan et al, Pearson Education Canada, 2016

Versions of the textbook back to the 7th edition are suitable if students wish to procure used texts.

Custom Case Package, available from www.iveycases.com; See Appendix A to this outline for ordering instructions (see page 16).

Each week, a PowerPoint presentation will be delivered to students covering the material required and testable on the quizzes and non-case portion of the final take-home case assessment. Strategic models will be discussed as part of these materials. Case learning points will be summarized weekly, as key “take-aways” from the class discussion. The business strategy game will be played over the course of term. Other materials the instructor wishes to hand-out will be distributed on an as-needed basis.

Evaluation and Grades

Grades are a measure of the performance of a student in individual courses. Each student shall be judged on the basis of how well he or she has command of the course materials.

Dates

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|---------------------------|-----|---|
| Class Participation | 20% | Daily |
| Mid-Term Case Take-Home | 20% | February 26 th , 2021 |
| Case Assignment (x1) | 20% | Selected from Course Timetable; |
| Group Competitive Project | 20% | April 9 th , 2021 |
| Take-Home Case Assessment | 20% | Apr 23 rd , 2021 (Released April 9 th , 2021) |

All assignments must be submitted within the Assignment section of OWL and receive a grade in order for students to pass this course. Turnitin will be used to verify authorship of every paper.

Please submit all work in .pdf, as the case may be, to save trees and facilitate use of TTS (text-to-speech) by professor.

Summary of Important Dates (Other than project deadlines)

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|------------------------------|--|
| January 15, 2021 | First Day of Classes for MOS 4410B |
| March 15, 2021 | Last day to DROP MOS 4410B without academic penalty |
| April 9 th , 2021 | Last Day of Classes for MOS 4410B |
| Apr 9-23, 2021 | Take Home Case Assessment; Issued: Apr.9; Due 11:55pm on Apr 23 rd uploaded to OWL site |

Participation: To maximize your online participation grades – and overall learning – students should attend all online Zoom synchronous classes to maximize opportunities to speak to their colleagues and concentrate on providing class comments which:

- Move the analysis along and/or take it to a “higher” level
- Provide insight that others may not have seen
- Are relevant to the class discussion
- Leverage prior learnings and other references, of your choice, in the context of the case discussion
- Add clarity to course PowerPoint slides (required reading) in the context of the case
- Challenge colleagues in a professional and logical manner

- Drawn similarities to previous learnings and demonstrates their relation to the current case scenario being discussed

Not coming to class equates to a zero for that class. Only coming to class and not speaking is considered very weak participation. Best practice participation includes reading materials in advance, communicating the news related to course topics, completing and sharing recommendations/models for case analyses, and being ready to contribute – and following through with contributions in class on Zoom. Verbal contributions online are worth the most, followed by relevant and timely chat comments. Responding to Professor questions with “thumbs up” type responses is worth less again. Being unresponsive without explanation to Zoom cold calling also looks poorly on student class performance and overall engagement.

Grade review: The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like a re-evaluation of your grade in any component of the course, you should follow the proscribed procedures as set out in the document available from your Academic Counselor. The suggested procedure is as follows:

- (a) Write a memo explaining why you need me to re-evaluate your grade. The memo should contain substantive arguments only, and not humanitarian (e.g., “I *really* need an A,” “I worked so hard”), or social justice (e.g. “he got an A for saying the same thing”) appeals. If you do feel that a social justice appeal is justified, you should get the cooperation of the person who you are comparing with, and have them also submit their paper. You may submit this memo to the commerce office.
- (b) You will normally get a response within a week.
- (c) The entire exam or paper will be re evaluated, and you should be aware that any grade changes are possible (i.e. decrease, increase or none). The only exception to the “entire paper gets re evaluated” policy is a case where there is a mathematical error in determining a grade.
- (d) Individuals cannot request a re-evaluation of group work. Such a request should come in writing from the group jointly.

The instructor is responsible for your grade in MOS 4410B but not responsible for any administrative decisions that may make use of your grade in MOS 4410B. If you believe that your grade requires review, please follow the procedure above.

Take-Home Case Assessment

The end-of-term take-home case assessment will consist of one case and 2-4 short answer/mini scenario questions, which is designed to test your knowledge of the material that is discussed in class sessions and found in the PowerPoints, readings, simulation and case learnings. It will be an assessment you can complete within 4 hours, but you can take more time should you wish. Students will be given access to the Take-Home Case Assessment the Friday of the final day of class, April 9th, 2021. There is no final exam in this class. You will be expected to deliver the complete case analysis and accompanying questions by April 23rd, 2021 at 11:55pm.

Requirements and Criteria

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. A combination of exams, individual participation, group presentation, **active** simulation involvement and decision-making, and case summary assignments will be used to evaluate participants on a number of different levels.

The criteria for success, in no particular order, are:

- Comprehension of the material
- Demonstration of an ability to think cross-functionally
- A willingness to participate for the benefit of oneself and fellow participants
- Strong work ethic to “pull your weight” in group assignments

These criteria will be applied to written and verbal work throughout the term.

Participants will be evaluated on the following activities, as listed in the table below:

| <i>Activity</i> | <i>Percentage of Grade</i> | <i>Description</i> |
|--|----------------------------|---|
| Take Home Case Final Assessment | 20% | <p>This take-home case assignment will be open book and contain two parts, as shown below:</p> <ol style="list-style-type: none"> 1. A medium-plus-length comprehensive case testing all course material <i>and</i> application of summary lessons captured at the end of each session 2. Several (3-4) short answer /mini scenario questions testing material from the weekly PowerPoint presentations, text, and other materials that may be utilized <p>It is due end-of-day (11:55pm) on December 16th, 2021. No exceptions. It will be uploaded to the Assignment section of OWL.</p> |
| Take Home Case Mid-Term Exam | 20% | <p>This take-home case mid-term exam will be open book and contain two parts, as shown below:</p> <ol style="list-style-type: none"> 3. A medium-plus-length comprehensive case testing all course material <i>and</i> application of summary lessons captured at the end of each session <p>It is due end-of-day (11:55pm) on February 26th, 2021. No exceptions. It will be uploaded to the Assignment section of OWL.</p> |
| Participation | 20% | <p>Preparation for online synchronous class case discussion, as demonstrated by;</p> <ul style="list-style-type: none"> • Willingness to lead and actively participate class discussions in a professional manner verbally and within Zoom chat room • Providing valuable insights and analysis • Responding to “cold-calls” • Using Zoom to share personal PowerPoint / Excel spreadsheets to present analyses and findings • Verbal participation is worth more than chat participation, while chat is worth more than simply giving “thumbs up” emoji’s / |

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| | | <p>participation in online polls</p> <ul style="list-style-type: none"> • Attending synchronous sessions is very important for participation; only when substantial hurdles exist (such as very unreliable bandwidth in a remote location) should students not attend; students must let the professor know if they will not be attending <p>Each week 3-4 students may present an optional, impromptu 1-2 minute presentation on a random topic provided by the Professor. Students will have 5 minutes to prepare their speech. Each student will be called upon once during term. Occasionally, students will be given exercises to prepare in advance of class. A random number of students may be called upon to present such analyses.</p> |
| <p>Case Assignment</p> | <p>20%</p> | <p>Individually prepared case analysis of a <i>one</i> case, which will be selected by students from among those cases in the case pack. Case analyses will be handed-in at the beginning of class. The case write-up should be no more than ten pages (double-spaced, 12-point Arial font) in length, with a maximum of seven exhibits (pages for exhibits can exceed seven, if necessary). The student should write the case assignment from the perspective of the main character in the case whose business issue requires a solution. The case-writing tools presented in class, in the text, and delivered on OWL as supplementary readings should be used to “crack the case”. The case assignment should include the following:</p> <ul style="list-style-type: none"> • Identify the main character in the case and their strategic business issue(s) • Summarize the key case “question(s)” from the perspective of the main character, asking the question “what needs to be done now, soon, this year, in 3 years, in 10 years”? • Using the casebook, course tools, and supplementary tools and information, conduct an analysis of the firm, its competitors, market, products, finances, people, operations, innovativeness, culture, and other business areas, to determine the root causes of the case issue(s) and identify potential short and long-run solutions • Go beyond the case facts in theorizing what the industry might look like in 2030 and 2050, and what the organization can do to stay relevant, growing current customers and acquiring new ones; ask what this company is doing/can do to become sustainable, create uncontested market space, develop wealth for stakeholders, and enhance profitability/other objective measurements • Ensure that a sustainability strategy is well articulated • Propose a solution(s) to the business problem(s). Create a detailed plan of action for the character/company to execute in order to solve their problem, enhance their competitiveness, and “win in the marketplace”, including the 5 W’s of how to execute on the plan |

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| | <p>For one of the two cases, a 3-5 minute presentation is optional to accompany your hand-in and can be delivered in class to augment your grade.</p> <p>One Case is due by October 28th, 2021 at 11:55pm. The second is due by the last class of term. No extensions. Each will be uploaded to the Assignment section of OWL.</p> |
| <p>Group Assignment 20% (2.5% Proposal, 15% Written Assignment, 2.5% Summary Presentation)</p> | <p>A complete <i>competitive and futuring analysis</i> will be undertaken by five or six (approximate) groups of 4-5 students, to be completed by December 9th, 2021. Groups will select an industry to study and will work together on their own time and should allocate the work effort evenly to each of the team members. Real-life organizations can be used as the subject of the report, but obtaining access is the responsibility of student groups. The assignment details are as follows:</p> <p>Objective: Describe the competitive landscape of an industry <i>of your choice</i>, including a detailed and analytical description of one of the main competitors <i>of your choice, both today and in 2030 and 2050</i>. Conduct your analysis from the purposes of where the industry has been, where it is today, and what it will take to achieve your proposed vision for the future. Answer questions such as:</p> <ul style="list-style-type: none"> • Will this industry grow, shrink, become extinct? How does it define innovation? • How is this industry evolving? What will it look like in 5 years? In 10 years? In 20 years? What needs to happen for this future to evolve? • What will the transition to this future entail? Looking back from the future, what should the company do? What assumptions are necessary? What key as-yet-defined innovations need to occur? • What scenarios are expected to be possible for the end-state in 2030 and along the way? What indicators will the company/industry use to know if they are on the right track? • Who or which organizations hold the power in this industry's value chain? • Where is the industry/company on the product life cycle? • How is value created for shareholders/other stakeholders in this industry? • Ensure that a sustainability strategy is well articulated • What should be done by the main competitor to stay competitive, to drive growth, to “creatively destruct” itself? What does this mean for incumbents? For Upstarts? <p>Tools: Groups should utilize the PowerPoint slides and any standard textbook on strategic management to structure the written assignment</p> |

and presentation. Students should be prepared to apply well-known strategic frameworks like “Porter 5 Forces” and other models, as deemed necessary, in depth during this group assignment. Analyses will be enhanced by making use of the tools presented on during class. The structure of the analysis should include customized versions of several of the models described in the class to show applicability of the models to this real-life industry analysis. These tools will be complemented by an effective presentation discussion early in the term.

Groups: To be assigned by professor.

Components of Assignment: Each group will be responsible for submitting several components of the overall assignment as follows:

- *Proposal:* Due March 5th, 2021 and worth 2.5% of group assignment mark. This proposal will be a 4 double-spaced, 12-point Arial font, page Word document that summarizes the analyzes to be undertaken. An accompanying PowerPoint can also be delivered. It will include:
 - Choice of industry / Primary Competitor to be analyzed and why chosen?
 - Table of contents of final written report
 - Research tools being utilized and description of project deliverables
 - Roles of each group team member and questions to be answered by analyses (A new Group Work contract has been developed for MOS courses and will be utilized by groups to ensure consistent and fairly distributed work effort planning and execution throughout term; groups will submit the contract along with their proposal).
- *Written Report – Industry & Primary Competitor Analysis:* Due April 9th, 2021 and worth 15% of group assignment mark. This portion of the written report will be 20+ double-spaced, 12-point Arial font, pages maximum in Word format. It will describe and analyze the nature of the industry, its competitive positioning, and prospects for the future and provide an analysis of one of the primary industry competitors based on an application of the tools described above. Report to follow proposal Table of Contents. It will be uploaded to the Assignment section of OWL.
- *Appendices and Exhibits:* Due April 9th, 2021 (included as part of written report marks). No more than ten pages of appendices and exhibits should be included to illustrate results of the analyses undertaken and should include any assumptions made.

- *5-7-Minute Summary Presentation:* Completed by all/some members to the class during the final week of class (April 9th, 2021), worth 2.5% of group assignment mark. Presentation should not exceed fifteen slides and should summarize all aspects of both components of the written report. *(NB: To expedite presentations by many teams in three hours, all summary presentations are to be e-mailed to Jan Klakurka by noon on April 9th, 2021)*

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| Total | 100% |
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POLICY AND PROCEDURE

Missed Tests, Quizzes and Assignments (including midterm examinations)

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. Provided that notification and documentation are provided in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

In such cases, students must notify their Academic Counsellor on the date of the missed test (or due date in the case of course work) and submit supporting within one week of the originally scheduled test or due date. Students who do not provide their Academic Counsellor or the instructor with appropriate or sufficient supporting documentation will be given a grade of 0 (zero).

Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Academic Counsellors will not accept a statement that merely confirms a report of illness made by the student and documented by the physician.

If a student is excusably absent from a class, students should re-double their efforts in remaining classes to increase their contribution to account for the missed class.

Course Work & Academic Honesty

Attendance in Online Class – Physical presence in class and active engagement in daily discussions is expected of all students. Material presented in class may be testable as part of the evaluations noted above.

Cameras should be on and microphones muted. Students should turn their microphones on as soon as they are called upon or when they wish to “jump into” the online verbal dialogue. Once done speaking, students should re-mute themselves on Zoom.

Each online synchronous class will follow a three-part agenda focused on increasing understanding of course material, applying course material and analytical tools to the case, and summarizing our key lessons learned, in a list, for later use (on exams, assignments, etc.). The three areas will be addressed according to the following timeline:

- Topical Discussion on the PowerPoint slides (required readings), led by Professor with class participation
- Case discussion facilitated by Professor with active participation by prepared students (all students)
- Two 10-15 minute breaks each 3-hour class and time to write on-going formal feedback about the class
- Commence Summary Learning Point List Creation
- Class Ends

A variety of techniques will be used to encourage participation, including “cold-calls”, assigning specific sections of the case analyses at the start of class, and “numbering-off” of all participants to request answers.

NOTE: The consistency of your participation comments, knowledge of the previously-delivered material, and quiz/assignment results will be addressed holistically. Students should prepare all weekly cases and assignments individually to maximize their learning and demonstrate the required level of understanding of the material.

Students and professor at the end of the class will list summary learning points. These points will be important study notes for future

Respect for fellow students is expected and mandatory (see Standard of Conduct section below) and required to encourage participation by all. Respect will further ensure that all relevant case concepts are raised, therefore increasing the depth of the analysis and discussion. Respect encompasses the following concepts:

- Attend all classes and arrive online on time
- Allow and encourage others to participate
- Refrain from “cat-calls” or derogatory comments – if students disagree with an analysis or comment, it is fully expected that counter arguments will be presented in a clear, concise, and professional manner
- Coming to class prepared, including having read the case in detail and having prepared any relevant analysis yourself

Zoom Meetings: A recurring meeting will be used to hold weekly class calls. A class-specific Zoom meeting ID and password will be separately provided on OWL. It may be accessed and used by registered students only.

Group Involvement: For the group assignment, groups should allocate the work evenly among each team member. All team members should be familiar with all aspects of the materials developed and presented. A single mark will be awarded to each member of a group. Groups should meet after hours to complete their group assignment, discuss findings, determine applicable textbook and resource guide approaches to use, analyze results, develop the written report and appendices, and rehearse their final group presentation. Groups can determine if each member will speak during the final presentation or if a single spokesperson will present or some derivation thereof. Fifteen percent (15%) of your group project mark (equivalent to 3% of overall mark) will be based on results of a peer review survey developed, delivered and interpreted by the Instructor. So, work well together and actively contribute.

The Group Industry Project requires students to work in teams of 4-5.

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behaviour and contributions to your team project.

1. When working in a team, students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

2. Resolving differences:

Conflicts can – and do – occur. Conflicts are part of the team's process of learning how to work together effectively and can actually generate exciting debate and creative solutions – if managed appropriately.

Student teams are collectively expected to resolve disputes or misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to reach a mutually agreeable solution, the entire team must meet with the professor as soon as possible – NOT IN THE LAST WEEK AFTER IT'S TOO LATE. The Professor will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

Feedback to Instructor

Please send any written or oral feedback to the instructor whenever you feel it is necessary. After session #2, I will ask for your written feedback (just use a blank piece of paper) on any issues you have or things you want to see addressed in the class. This feedback should be confidential, so there is no need to provide your name unless you feel you would like to do so. This type of feedback will then be welcomed at any point during the term. The feedback will be addressed and used to improve the course and your learning experience. During the mid-point of term, a formal feedback survey will be conducted using the Western Student Opinion Survey seeking your feedback on the course to-date with a view to implementing suggestions for improvement for the second part of term.

During the final weeks of term, you are requested to complete the Student Opinion survey when made available by the Faculty of Arts & Social Sciences.

Submission of Assignments

All assignments are due at the beginning of class on the date specified in the course outline. Late submissions of any assignment may be considered; however, a resolution may be determined at the instructor's discretion and will include an academic penalty of 2%/day off the

grade otherwise obtained. Students who, for reasons beyond their control, are unable to submit an assignment by its deadline must obtain approval from the instructor for an extension. Supporting documentation will be required as per the policy on missed tests and assignments.

Standard of Conduct in this Course

Since this course is part of a degree designed to give you a broad understanding of the world of business, we aim to run the course in a way which will be consistent with the world of business - where many of you will spend your working lives. We strive to provide accurate information, quality materials and good service, consistent with our obligations to maintain the high academic standards of Huron University College and Western University.

In return we expect that you will conduct yourself in a way that prepares you for the world of work.

- 1 We start on time, so please do not arrive late and disrupt others.
- 2 Leaving class early is also disruptive to your colleagues and will not be permitted unless you have made prior arrangements with the instructor.
- 3 Turn off your cell phone, pager, and watch alarm.
- 4 Keep up to date. Make sure that you know the class schedule. Check on the course web page for updates and posted materials.
- 5 During the class, respect the learning opportunities of others. Don't distract others by chatting to your neighbour. Our expectation is that you will not only contribute in class to your own learning, but also to that of others.

Accessibility Needs

Huron University College is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible.

Academic Integrity

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the Huron University College. Participating honestly, respectfully, responsibly, and fairly in this academic community ensures that the Western degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

The University's Code of Behaviour on Academic Matters

You are expected to be familiar with the contents of the Code. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

If you have any question about what is or not is permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the professor or other Huron/Western resources.

Email

At times, the course instructor may decide to communicate important course information by email. As such, all Huron University College students are required to have a valid huron.uwo.ca or UWO email address. You are responsible for ensuring that your university email address is set up. Forwarding your huron.uwo.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from huron.uwo.ca addresses sent to Hotmail, Gmail or Yahoo, etc. accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

OWL and the Course Page

The online course page for this course is accessed through OWL. To access the course page, go to the OWL login at <https://owl.uwo.ca/portal> and log in using your UWO login name and password. Once you have logged in, look for the MOS 4410B - 2021 module where you will find the link to all course materials.

Recording Lectures

Lectures and course materials prepared by the instructor are considered by the University to be an instructor's intellectual property covered by the Canadian Copyright Act. Zoom audio files will be made available on Zoom for two weeks following the synchronous class session. No student or other party has right to post the audio or any class video files on social media, internet sites, cloud services (other than personal OWL account for their solitary use), peer-to-peer file sharing services, or other such sites. Audio files are not to be copied. Students wishing to record a lecture or other course material in any way other than the Zoom provided are required to ask the instructor's explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, OWL materials, etc.

If permission is granted by the professor, it is intended for the individual student's own study purposes and does not include permission to "publish" them in any manner. It is absolutely forbidden for a student to publish an instructor's notes to a website or sell them in any other form without formal written permission.

MOS 4410B Tentative Course Schedule (Note: Additional required and/or supplementary readings may be assigned weekly on OWL to be prepared before class for in-class discussion)

NB: All cases are Ivey unless otherwise noted.

| Session | Date | Topic | Chapter & Case |
|---------|--------------|--|---|
| 1 | Jan 15, 2021 | <ul style="list-style-type: none"> Course Overview and Introductions Introduction to Strategy | <ul style="list-style-type: none"> Text: Ch. 1 Case: Eveline Charles: Sizing Up Opportunities, 9B10M045, Ivey Reading: What is Strategy?, Michael Porter, HBS, 1996 |
| 2 | Jan 22, 2021 | <ul style="list-style-type: none"> External & Internal Analysis Competitive Strategy Environment Strategy in Non-Profits Value Proposition | <ul style="list-style-type: none"> Text: Ch. 2 Case: Louis Vuitton, 9B13M022, Ivey Reading: Competition and Business Strategy in Historical Perspective, Ghemawat, Business History Review, 2002 |
| 3 | Jan 29, 2021 | <ul style="list-style-type: none"> Good to Great Discussion Value Chain Managing Strategic Choices & Preferences | <ul style="list-style-type: none"> Text: Ch. 3 Case: Starbucks, 9A98M006 & Starbucks: Regaining Focus, 9B08M030, Ivey Reading: The Core Competence of the Corporation, Hamel & Prahalad, HBS, 1990 |
| 4 | Feb 5, 2021 | <ul style="list-style-type: none"> Business Model Innovation How to Grow When Markets Don't? What to Evaluate? | <ul style="list-style-type: none"> Case: IMAX: Larger the Life, 9B09M019, Ivey Reading: The CEO of IMAX on How It Became a Hollywood Powerhouse, Gelfond, Richard, HBS, 2013 (Ivey Casepack) |
| 5 | Feb 12, 2021 | <ul style="list-style-type: none"> Leveraging the Brand What's the Next Big Thing? | <ul style="list-style-type: none"> Text: Ch. 4 Case: Strategizing at Monarchia Matt International (MMI), 8B07M14, Ivey |
| | Feb 19, 2021 | <ul style="list-style-type: none"> Winter Reading Week | <ul style="list-style-type: none"> NO CLASSES HELD |
| 6 | Feb 26, 2021 | <ul style="list-style-type: none"> Sustaining Competitiveness Blue Ocean Strategy Discussion Take Home Mid-Term Case Exam Due | <ul style="list-style-type: none"> Text: Ch. 5 Case: Nintendo Wii U: Lessons Learned for New Strategic Directions, 9B14M166, Ivey Reading: Blue Ocean Strategy, Chan and Mauborgne, HBS, 2004 |
| 7 | Mar 5, 2021 | <ul style="list-style-type: none"> Strategic Project Execution Ultimate Question Discussion | <ul style="list-style-type: none"> Text: Ch. 6 Case: Ontario Place Revitalization, |

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| | | <ul style="list-style-type: none"> • Group Project Proposal Due | 9B12M087, Ivey |
| 8 | Mar 12, 2021 | <ul style="list-style-type: none"> • Mergers & Acquisitions • Strategic Leadership • One Case Due Today (11:55pm) | <ul style="list-style-type: none"> • Text: Ch. 7 • Case: Research in Motion: The Acquisition of Slangsoft (A) & Research in Motion: Slangsoft in the Jerusalem Post (B), 9B03M009 & 9B03M010 |
| 9 | Mar 19, 2021 | <ul style="list-style-type: none"> • Functional Strategy • Outsourcing Strategy • Organization and People Strategy • Branson's book Discussion | <ul style="list-style-type: none"> • Text: Ch. 8 • Case: WestJet Airlines: Information Technology Governance and Corporate Strategy, 9B13E020, Ivey |
| 10 | Mar 26, 2021 | <ul style="list-style-type: none"> • International Strategy • Global Joint Ventures | <ul style="list-style-type: none"> • Text: Ch. 9 • Case: Eli Lilly in India: Rethinking the Joint Venture Strategy (Ivey, 9B04M016) • Reading: Developing global leaders. By: Ghemawat, Pankaj, McKinsey Quarterly, 00475394, 2012, Issue 3 |
| 11 | April 9, 2021 | <ul style="list-style-type: none"> • Implementation Strategy • Six Sigma Discussion • Social Responsibility • Capitalism at the Crossroads Discussion • Group Assignment Due • Group Presentations | <ul style="list-style-type: none"> • Case: Strategy Execution at Mediolanum Bank, 12461 • Group Pitch Presentations (5 minutes long each) |
| Take Home Case Assessment | Apr 9-23, 2021 | <ul style="list-style-type: none"> • Take Home Case Assessment | <ul style="list-style-type: none"> • Case: To Be Revealed on Apr 9th by 6pm • Case Due: Apr. 23rd, 2021 @ 11:55pm |

Your Lecturer

Jan Klakurka is Chair of Management and Organizational Studies at Huron University College, Western University and long-standing Instructor within the strategy department at the Rotman School of Management, University of Toronto. Jan's professional designations include: C. Dir., CPA, CA, APF and CMC, the latter where Jan was past Canadian Association of Management Consultant's Gold Medalist for Canada. He is a graduate of University of Toronto (B.Comm), the Richard Ivey School of Business (MBA), and Director's College, McMaster University. Jan's professional background spans nineteen years in industry and professional services, and six more in academia. Prior to the Academy, Jan was Director, Corporate Planning & Business Development, leading and delivering strategy for a mid-tier firm. He has led finance as corporate controller and streamlined operations as Director, Process Improvement, advised C-suite leaders a senior strategy consulting manager, and worked in Canadian treasury operations. With experience across multiple industries, Jan has served organizations across private and public sectors and now teaches senior year courses in strategy, international business, advanced taxation, among others. Jan's research is directed toward the intersection

of strategic planning, lucid foresight and governance, with recent keynotes covering consulting academics and conference presentations in global management. As such, Jan is a designated (APF) member of the Association of Professional Futurists.

Jan has taught *Strategic Management* at University of Toronto since 2005 (UTM: 2005-2009, Rotman: 2012-2021), Huron (2014-2021), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (2012-2021, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2021) which he brought to Huron (2016-2017). He also regularly teaches *Introduction to Management* at Rotman Commerce (2011-2019). In 2014, he began teaching a Summer Abroad course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its seventh year. Jan was awarded the Excellence in Teaching Award at Rotman in 2017 and multiple past years. He has also taught the general management Ivey LEADER (Leading Education in Emerging Regions) program in Dnepropetrovsk, Ukraine and Minsk, Belarus, has spoken on strategic foresight at University of Toronto, leadership, consulting, and finance at Brock University and the Ivey Business School, taught on the topic of wines at the Independent Wine Education Guild, and has developed and delivered training programs to Deloitte Consulting staff on a range of topics.

A graduate of UTM's Commerce program, Jan went on to complete several designations – CPA, CA, C.Dir., APF and CMC, the latter where he was Gold Medalist for the Canadian Association of Management Consultants (2003). His favourite business book is still Competing for the Future, by Hamel and Prahalad, and he enjoys skiing, golf, scuba-diving, white-water kayaking, and strategic investments. His greatest project is having fun with his two daughters who are fourteen and twelve years-old. In 2006, he was awarded the AIWS designation, joining wine experts worldwide that have completed the Diploma in Wines & Spirits (Dipl.WSET) from the Wine & Spirit Education Trust based in London (U.K.) and is currently on the long road in pursuit of the Master of Wine designation. In 2014, Jan received his Chartered Director's designation offered by the Director's College, Degroote School of Business, McMaster University. Jan is founding partner at Elevae Strategic Advisory and serves as Board member and CFO of Corporations for Community Connections, Inc. a private foundation of Siemens, and on the finance committee of the Mansfield Ski Club.

APPENDIX A: Instructions for Accessing Course Material for Strategic Management for MOS (MOS 4410B Winter 2021)

You have registered for:
Course: Strategic Management for MOS
Professor(s): Jan Klakurka
Starting: Dec 11, 2020
Ending: Apr 30, 2021

This message explains how to purchase the course materials needed for your class which are available on Ivey Publishing's website.

Go to the Coursepack link: <https://www.iveycases.com/CoursepackView.aspx?id=27966>

You will need to [log in](#) or [create an account](#). Once you have done so, you can choose to purchase a print or digital copy of the coursepack. Coursepacks are PDF documents that can be opened using Adobe Reader. Digital coursepacks may be opened and printed for a period of 30 days from the time you complete your purchase; once downloaded to your computer, you will have digital access until the course end date. If you want to keep these materials beyond this time frame, you will need to print the coursepack. **This coursepack is for your personal use only and is not to be shared or distributed in any form.**

I hope you find this a convenient way to get your required course materials. If you have any questions, please contact me at ijklakurk@huron.uwo.com.

Thank you,
Jan Klakurka

For technical assistance, please contact Ivey Publishing during business hours.

Ivey Publishing
Richard Ivey School of Business
The University of Western Ontario
(e) cases@ivey.ca | (f) 519-661-3882
(t) 519-661-3208 | (tf) 800-649-6355

<https://www.iveycases.com/>

Digital Download Support:
[Instructions for opening your first PDF](#)
[Instructions for Mac users](#)

Hours of Operation:
Monday to Thursday: 8:00am-4:30pm (EST)
Friday: 8:00am-4:00pm (EST)



Appendix B to Course Outlines

Prerequisite Information

Students are responsible for ensuring that they have successfully completed all course prerequisites. Unless you have either the requisites for this course or written special permission from your Dean to enrol in it, you may be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites.

Conduct of Students in Classes, Lectures, and Seminars

Membership in the community of Huron University College and the University of Western Ontario implies acceptance by every student of the principle of respect for the rights, responsibilities, dignity and well-being of others and a readiness to support an environment conducive to the intellectual and personal growth of all who study, work and live within it. Upon registration, students assume the responsibilities that such registration entails. The academic and social privileges granted to each student are conditional upon the fulfillment of these responsibilities. In the classroom, students are expected to behave in a manner that supports the learning environment of others. Students can avoid any unnecessary disruption of the class by arriving in sufficient time to be seated and ready for the start of the class, by remaining silent while the professor is speaking or another student has the floor, and by taking care of personal needs prior to the start of class. If a student is late, or knows that he/she will have to leave class early, be courteous: sit in an aisle seat and enter and leave quietly.

Please see the *Code of Student Rights and Responsibilities* at:

<http://www.huronuc.ca/CurrentStudents/StudentLifeandSupportServices/StudentDiscipline>

Technology

It is not appropriate to use technology (such as, but not limited to, laptops, PDAs, cell phones) in the classroom for non-classroom activities. Such activity is disruptive and is distracting to other students and to the instructor, and can inhibit learning. Students are expected to respect the classroom environment and to refrain from inappropriate use of technology and other electronic devices in class.

Academic Accommodation for Medical/Non-Medical Grounds

Requests for Accommodation on Medical Grounds for assignments worth 10% or more of final grade: Go Directly to Academic Advising

University Senate policy, which can be found at

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/accommodation_medical.pdf,

requires that all student requests for accommodation on medical grounds for assignments worth 10% or more of the final grade be made directly to the academic advising office of the home faculty (for Huron students, the “home faculty” is Huron), with supporting documentation in the form (minimally) of the Senate-approved Student Medical Certificate found at:

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/medicalform_15JUN.pdf.

The documentation is submitted in confidence and will not be shown to instructors. The advisors will contact the instructor when the medical documentation is received, and will outline the severity and duration of the medical challenge as expressed on the Student Medical Certificate and in any other supporting documentation. The student will be informed that the instructor has been informed of the presence of medical documentation, and will be instructed to work as quickly as possible with the instructor on an agreement for accommodation. The instructor will not normally deny accommodation where appropriate medical documentation is in place and where the duration it describes aligns with the due date(s) of assignment(s). Before denying a request for accommodation on medical grounds, the instructor will consult with the Assistant Dean, Student Success. The instructor’s decision is appealable to the dean.

Requests for Accommodation on Medical Grounds for assignments worth less than 10% of final grade: Consult Instructor Directly

When seeking accommodation on medical grounds for assignments worth less than 10% of the final course grade, the student should contact the instructor directly. The student need only share broad outlines of the medical situation. The instructor may require the student to submit documentation to the academic advisors, in which case she or he will advise the student and inform the academic advisors to expect documentation. The instructor may not collect medical documentation. The advisors will contact the instructor when the medical documentation is received, and will outline the severity and duration of the medical challenge as expressed on the Student Medical Certificate and in any other supporting documentation. The student will be informed that the instructor has been informed of the presence of medical documentation, and will be instructed to work as quickly as possible with the instructor on an agreement for accommodation. The instructor will not normally deny accommodation where appropriate medical documentation is in place and where the duration it describes aligns with the due date(s) of assignment(s). Before denying a request for accommodation on medical grounds, the instructor will consult with the Assistant Dean, Student Success. The instructor's decision is appealable to the dean.

Requests for Accommodation on Non-medical Grounds: Consult Instructor Directly

Where the grounds for seeking accommodation are not medical, the student should contact the instructor directly. Apart from the exception noted below, academic advisors will not be involved in the process of accommodation for non-medical reasons.

Where a student seeks accommodation on non-medical grounds where confidentiality is a concern, the student should approach an academic advisor with any documentation available. The advisors will contact the instructor after the student's request is received, and will outline the severity and duration of the challenge without breaching confidence. The student will be informed that the instructor has been informed that significant circumstances are affecting or have affected the student's ability to complete work, and the student will be instructed to work as quickly as possible with the instructor on an agreement for accommodation. Before denying a request for accommodation where documentation has been submitted to an academic advisor, the instructor will consult with the Assistant Dean, Student Success. The instructor's decision is appealable to the dean.

Statement on Academic Offences

Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following Web site: http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_undergrad.pdf

Statement on Academic Integrity

The International Centre for Academic Integrity defines academic integrity as "a commitment, even in the face of adversity, to five fundamental values: honesty, trust, fairness, respect, and responsibility. From these values flow principles of behaviour that enable academic communities to translate ideals to action." (CAI Fundamental Values Project, 1999).

A lack of academic integrity is indicated by such behaviours as the following:

- Cheating on tests;
- Fraudulent submissions online;

Plagiarism in papers submitted (including failure to cite and piecing together unattributed sources);
Unauthorized resubmission of course work to a different course;
Helping someone else cheat;
Unauthorized collaboration;
Fabrication of results or sources;
Purchasing work and representing it as one's own.

Academic Integrity: Importance and Impact

Being at university means engaging with a variety of communities in the pursuit and sharing of knowledge and understanding in ways that are clear, respectful, efficient, and productive. University communities have established norms of academic integrity to ensure responsible, honest, and ethical behavior in the academic work of the university, which is best done when sources of ideas are properly and fully acknowledged and when responsibility for ideas is fully and accurately represented.

In the academic sphere, unacknowledged use of another's work or ideas is not only an offence against the community of scholars and an obstacle to academic productivity. It may also be understood as fraud and may constitute an infringement of legal copyright.

A university is a place for fulfilling one's potential and challenging oneself, and this means rising to challenges rather than finding ways around them. The achievements in an individual's university studies can only be fairly evaluated quantitatively through true and honest representation of the actual learning done by the student. Equity in assessment for all students is ensured through fair representation of the efforts by each.

Acting with integrity at university constitutes a good set of practices for maintaining integrity in later life. Offences against academic integrity are therefore taken very seriously as part of the university's work in preparing students to serve, lead, and innovate in the world at large.

A university degree is a significant investment of an individual's, and the public's, time, energies, and resources in the future, and habits of academic integrity protect that investment by preserving the university's reputation and ensuring public confidence in higher education.

Students found guilty of plagiarism will suffer consequences ranging from a grade reduction to failure in the course to expulsion from the university. In addition, a formal letter documenting the offence will be filed in the Dean's Office, and this record of the offence will be retained in the Dean's Office for the duration of the student's academic career at Huron University College.

All required papers may be subject to submission for textual similarity review to the commercial plagiarism detection software under license to the University for the detection of plagiarism. All papers submitted for such checking will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between The University of Western Ontario and Turnitin.com.

Computer-marked multiple-choice tests and/or exams may be subject to submission for similarity

review by software that will check for unusual coincidences in answer patterns that may indicate cheating.

Personal Response Systems (“clickers”) may be used in some classes. If clickers are to be used in a class, it is the responsibility of the student to ensure that the device is activated and functional. Students must see their instructor if they have any concerns about whether the clicker is malfunctioning. Students must use only their own clicker. If clicker records are used to compute a portion of the course grade:

- the use of somebody else’s clicker in class constitutes a scholastic offence,
- the possession of a clicker belonging to another student will be interpreted as an attempt to commit a scholastic offence.

○ **Statement on Academic Offences:**

“Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following website:

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_undergrad.pdf.”

Additionally,

A) If written work will be assigned in the course and plagiarism-checking software might be used, the following statement to this effect must be included in the course outline: “All required papers may be subject to submission for textual similarity review to the commercial plagiarism detection software under license to the University for the detection of plagiarism. All papers submitted for such checking will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between The University of Western Ontario and Turnitin.com (<http://www.turnitin.com>).”

B) If computer-marked multiple-choice tests and/or exams will be given, and software might be used to check for unusual coincidences in answer patterns that may indicate cheating, the following statement must be added to course outlines: “ Computer-marked multiple-choice tests and/or exams may be subject to submission for similarity review by software that will check for unusual coincidences in answer patterns that may indicate cheating.”

- At Huron University College, FASS policy requires the following statement on plagiarism to appear on all course outlines:

Plagiarism is an academic offense and will be treated as such. Students who are in doubt as to the nature of this offence should consult their instructor, Department Chair, or Dean’s Office, as well as the Huron University College Statement on Plagiarism, available at the Reference Desk in the Huron University College Library and at www.huronuc.on.ca~. In addition, students may seek guidance from a variety of current style manuals available at the Reference Desk in the Huron University College Library. Information about these resources can be found at <https://huronuc.libguides.com/citingsources> .

Policy on Special Needs

Students who require special accommodation for tests and/or other course components must make the appropriate arrangements with the Student Development Centre (SDC). Further details concerning policies and procedures may be found at:

http://www.sdc.uwo.ca/ssd/?requesting_acc

Attendance Regulations for Examinations

A student is entitled to be examined in courses in which registration is maintained, subject to the following limitations:

- 1) A student may be debarred from writing the final examination for failure to maintain satisfactory academic standing throughout the year.
- 2) Any student who, in the opinion of the instructor, is absent too frequently from class or laboratory periods in any course will be reported to the Dean of the Faculty offering the course (after due warning has been given). On the recommendation of the Department concerned, and with the permission of the Dean of that Faculty, the student will be debarred from taking the regular examination in the course. The Dean of the Faculty offering the course will communicate that decision to the Dean of the Faculty of registration.

Class Cancellations

In the event of a cancellation of class, every effort will be made to post that information on the Huron website, <http://www.huronuc.ca/AccessibilityInfo> ("Class Cancellations").

Mental Health @ Western

Students who are in emotional/mental distress should refer to Mental Health @ Western <http://www.uwo.ca/uwocom/mentalhealth/> for a complete list of options about how to obtain help.

Academic Advising

For advice on course selections, degree requirements, and for assistance with requests for medical accommodation [see above], students should contact an Academic Advisor in Huron's Student Support Services (huronsss@uwo.ca). An outline of the range of services offered is found on the Huron website at:

<http://www.huronuc.ca/CurrentStudents/AcademicAdvisorsandServices>

Department Chairs and Program Directors and Coordinators are also able to answer questions about their individual programs. Their contact information can be found on the Huron website at: <http://www.huronuc.ca/Academics/FacultyofArtsandSocialScience>

- **Support Services:** The websites for Registrarial Services (<http://www.registrar.uwo.ca>), and the same for affiliated university colleges when appropriate, and any appropriate Student Support Services (including the services provided by the USC listed here: <http://westernusc.ca/services/>) and the Student Development Services, should be provided for easy access.

"Students who are in emotional/mental distress should refer to Mental Health@Western <http://www.uwo.ca/uwocom/mentalhealth/> for a complete list of options about how to obtain help."

University students may encounter setbacks from time to time that can impact academic performance. Huron offers a variety of services that are here to support your success and

wellbeing. Please visit <https://huronatwestern.ca/student-life-campus/student-services/wellness-safety> for more information or contact staff directly:

Wellness Services: huronwellness@huron.uwo.ca

Community Safety Office: safety@huron.uwo.ca

Chaplaincy: gthorne@huron.uwo.ca

Additional supports for Health and Wellness may be found and accessed at Western through, www.uwo.ca/uwocom/mentalhealth/.

The Student Emergency Response Team (SERT) provides medical response to 9-1-1 calls on Main, Brescia and Huron campuses which operates 24 hours a day, 7 days a week during the academic year. SERT is dispatched through the campus community Police Service (CCPS) to any medical emergency on campus at (519) 661-3300.

For more information about SERT please visit: www.sert.uwo.ca/about-sert/aboutsert/ .