

# **SPRING SEMESTER 2014**

## **MGT 527-01W: STRATEGIC MANAGEMENT**

**CLASSROOM:** Online Course—E-College

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### **REQUIRED TEXT:**

**Parnell, John (2013). Strategic Management: Theory and Practice, 4<sup>th</sup> Edition. Sage. ISBN: 9781452234984. [www.sagepub.com/books](http://www.sagepub.com/books).**

**Suggested: Ellet, William. (2007). The Case Study Handbook. Harvard Business Press – Do not pay more than \$10 to \$15 for Ellet book – See sellers listed on Google.com**

### **COURSE DESCRIPTION:**

This class involves the study of administrative processes and policy determination at the general managerial level which will be taught through assigned readings, applied homework, a business plan or a strategic audit, and the sharing of ideas and experiences with peers. This course is open to business majors only and should be taken during semester of graduation unless approved by department head and professor.

### **COURSE OBJECTIVES:**

1. Understand, and be able to utilize, Strategic Management and ancillary business theories.
2. Understand the role of ethics in the strategic management of organizations.
3. Understand the influence that external forces--social, political/legal, economic, technological, and globalization--exert in business performance.
4. Understand strategy research, including extensive use of the internet as a research tool.
5. Be able to systematically apply strategic management models, concepts, & tools to the analysis of an ongoing enterprise, including industry, environmental, and firm assessments; firm, business, and functional strategic assessments; development & evaluation of strategic alternatives; and strategic implementation and control.

### **COURSE PREREQUISITES:**

In order to enroll in this course, you must be in your last semester of an MBA/MSM/MS-Marketing program and have acquired departmental approval.

### **COURSE FORMAT:**

This course is entirely Web-based. You will find the majority of the information and materials that you will need to complete the course in this syllabus and on the eCollege course management website. Be sure to log onto eCollege and check your university e-mail regularly to see what work you are required to do. All assignments and additional materials/readings will be posted on eCollege, under the Doc Sharing tab. You should submit your work in a format that is compatible with **Microsoft Office 2003/2007/2010 (doc or docx file)** and post it in the appropriate "Dropboxes" when they are due. I will also have class live session throughout the course. Please see the schedule for the dates and time.

### **COURSE SCHEDULE:**

A course schedule is included at the end of this syllabus.

## **SYLLABUS SUBJECT TO CHANGE STATEMENT:**

I anticipate that we will follow the schedule I've outlined in this syllabus, but I may make adjustments based on what actually happens in class. Be sure to check for announcements and emails for any change. I may also change the basis for the course grade. If I do so, I will so inform you in writing. Remaining in the course after reading this syllabus will signal that you accept the possibility of changes and responsibility for being aware of them.

**STATEMENT ON ACADEMIC INTEGRITY:** Academic honesty is the foundation of the university community. Cheating, plagiarism, or other acts of academic dishonesty compromise the integrity of the academic process and community and are subject to disciplinary action. For this class, plagiarism will result in automatic failure (final course grade of F).

An academic honesty policy has been posted under the "Doc Sharing" tab. You should read this document, initial it, and submit it to me via its corresponding "Dropbox".

## **SPECIAL NEEDS/REASONABLE ACCOMODATIONS:**

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you have a disability requiring an accommodation, please contact:

**Office of Student Disability Resources and Services**  
**Texas A&M University-Commerce**  
**Gee Library**  
**Room 132**  
**Phone (903) 886-5150 or (903) 886-5835**  
**Fax (903) 468-8148**  
[StudentDisabilityServices@tamu-commerce.edu](mailto:StudentDisabilityServices@tamu-commerce.edu)

**TENETS OF COMMON BEHAVIOR STATEMENT:** All students enrolled at the university shall follow the tenets of common decency and acceptable behavior conducive to a positive learning environment (See current Student Handbook).

## **COURSE POLICIES AND INSTRUCTOR EXPECTATIONS:**

Students are required to meet the expectations listed below.

- **Professional Behavior:** It is important that you maintain a professional demeanor at all times, including during "electronic communication". Texas A&M-Commerce expects this from you, as do current and future employers. Since so much communication in the workplace is "electronic" nowadays, this course will be a good place to practice interacting in a manner appropriate to a professional setting. In particular, take special care when posting and responding to discussion board questions.
- **Regular and Timely Attendance and Participation:** You are expected to log onto eCollege regularly.
- **Assignments:**
  1. **Submitted assignments must be correctly formatted and free of grammatical and stylistic errors.** Students in MGT 527 should have at least some skill with software for word processing, spreadsheets, databases, graphics, and presentations, and with web browsers and search engines. Spelling and grammatical errors will detract from your grade!
  2. **Assignments must be turned in on time.** Assignments are due at the **date** and **time** listed. All work and assignments for the entire course will be available on the first day of class. While the syllabus designates specific dates for which work is assigned, you do not have to wait until the "assigned" date to start working on it. Start working on each assignment as soon as you possibly can and make sure that you have the general and case assignments submitted by the specified due dates. I have outlined a "suggested" schedule that I think would help you maintain a good pace, but you don't have to follow it. However, you **MUST** turn in general and case assignments and the exam **ON TIME**. You will have until **8:00 AM CST** to submit the work that is listed in the far right, "Work Due" column of the course schedule provided on page 4 of this syllabus. I will accept late assignments. However, there will be a significant penalty. For each day that your assignment is late, I will deduct **10 POINTS** from your grade. If you do not meet the 8:00 AM deadline (even by one or two minutes), I will deduct 10 points. If you do not turn the assignment in by 8:00

AM CST the next day, I will deduct an additional 10 points, and so on. Saturdays and Sundays count towards the total days late.

3. **Assignments must be complete.** You must complete and submit all components at the specified due date and time to receive credit for the assignment. Please don't turn in work that is only "half-finished" and then attempt to submit the rest of the assignment at a later date.
- **Back-ups Are Required:** You are required to back up all your assignments on a disk that can be submitted to me upon my request. If work is lost due to insufficient back-up, you will not have the opportunity to recreate and submit at a later time.
  - **E-mail:** Students must routinely check e-mail sent to his or her **Texas A&M-Commerce account**. This is my primary mechanism for communicating to the class. I check my e-mail several times a day, so this is the best way to reach me.
  - **Make-up Exams or Late Assignments Will Only Be Accepted If You Obtain University Approved Documentation for Your Excuse:** There are no make-up assignments for poor performance on a previous assignment.
  - **Changes to Schedule:** While I plan to stick to the class schedule, there might be occasions to modify the schedule. In these cases, all changes will be announced via eCollege and e-mail. It is your responsibility to become aware of any such changes.

### GRADE COMPONENTS:

Component	Type	Value
Team Strategic Plan	Group	(10%)
Team Case Analysis	Group	(20%)
Exam I	Individual	(10%)
Written Case Analysis (Strategic Audit)	Individual	(30%)
Exam II	Individual	(10%)
Personal Strategic Plan	Individual	(10%)
The ETS® Major Field Test in Business	Individual	(10%)
<b>Course Total</b>		<b>100%</b>

### GRADING SCALE:

A	90 – 100%	D	60-69%
B	80 – 89%	F	Below 60%
C	70-79%		

Withdrawal - Must be initiated by the student administratively.

**\*NOTE:** Final grades will be assigned based upon your final **POINT** total.

**\*\*Note for Grade 4:** Individual written cases/strategic audit, Word document will be approximately 30 pages in length & include ALL required sections (See strategic audit outline attached). If additional pages are needed, use appendices (e.g., for some of history, etc.). Note: The strategic audit is also the comprehensive exam for some graduate degrees (e.g., MBA and MS in Management).

**\*\*\*Note for Grade 7:** The ETS® Major Field Test in Business helps us assess our graduate business curriculum. As the only comprehensive national assessment for program evaluation of its kind, the ETS® Major Field Test for the MBA consists of 124 multiple-choice questions, half of which are based on short case-study scenarios. Questions employ materials such as diagrams, graphs and statistical data. Mathematical operations do not require a calculator. Most of the questions require knowledge of specific information drawn from marketing, management, finance and managerial accounting, or a combination of these. The results of this test are kept confidential. Students are **required** to complete the exam as part of their course requirements in MGT 527. This will represent 10% of your grade. Details regarding the exam dates, locations, and method of delivery will be announced in the course in January.

**CLASS LIVE PRO SESSION:** It is not required that you participate in the Class Live Pro, but it is a great opportunity to communicate with me and your fellow students and to ask questions and gain clarification on any issues you may have. In order to get to the chat room: (1) Click the "Live" tab at the top of the eCollege course screen; (2) Click "**CLASS LIVE**" to enter the main discussion room for this course; Then "Click the Join session button to Enter Class Live Pro" session. First Class Live Pro session will be held on January 17<sup>th</sup> from 7:30-8:30 PM in eCollege. For detailed schedule please review the class schedule.

**FINDING A GROUP FOR THE TEAM STRATEGIC PLAN AND CASE ANALYSES:** The group that you select for your Team Strategic Plan homework assignment is the same group that you will be a part of for the Group Case Analyses. The group should consist of 4-5 members. Try to find and organize a group via the "Student Lounge" function on the eCollege site for this course. Once you have formed a group, please select one person to e-mail me a list of the students comprising your group. If you can only find 3-4 members, e-mail me that list and I can place 1-3 people who do not have a group in your group so that it is complete. If you cannot find a group, e-mail me as soon as possible so that I have time to find you one. I will set up "groups" in eCollege so that members can contact each other and share information via our eCollege site. You should establish your group within the first week of class.

I would create "Group discussion forum" on the course home page where you can communicate with each other.

- ❖ **THIS WEEKLY SCHEDULE IS TENTATIVE.**
- ❖ **I MAY ASSIGN ADDITIONAL READINGS & EXERCISES THROUGHOUT THE SEMESTER.**
- ❖ **Note – Strategic Audits of organizations – not from textbook – will be approximately 30 pages in length (Word document) & include ALL required sections (See Case outline attached.). If additional pages are needed, use appendices (e.g., for some of history, etc.). A PowerPoint presentation is also required. Audio is not required.**

WEEK & DATE	READINGS & ASSIGNMENTS	WORK DUE MONDAY BY 8:00 AM
1. January 13	<b>Chapter 1</b> <b>**TEAM ESTABLISHMENT! **</b> <b>Team Strategic Plan (Mission, Vision, Goals, etc.)</b> <b>Strategic Audit Assigned (Individual)</b>	<b>Submit AHP in dropbox</b> <b>Class Live Pro (7:30-8:30 PM CST) on 01/17</b>
2. January 20	<b>Chapter 2</b>	
3. January 27	<b>Chapter 3</b>	<b>Team Strategic Plan is due on 01/27</b> <b>Class Live Pro (7:30-8:30 PM CST) on 01/27</b>
4. February 03	<b>Chapter 4</b>	
5. February 10	<b>Chapter 5</b> <b>Team Case Analysis from Text (Case 12: Toyota in Crisis, Pg. 593)</b>	<b>Class Live Pro (7:30-8:30 PM CST) on 02/10</b>
6. February 17	<b>Chapter 6</b> <b>**Peer Reviews Due**</b>	<b>Team Case Analysis &amp; Peer Reviews due on 02/17</b>
7. February 24	<b>Exam 1 Assigned (Chapters 1-6)</b>	
8. March 03	<b>Chapter 7</b>	<b>Exam due on 03/03</b> <b>Class Live Pro (7:30-8:30 PM CST) on 03/03</b>
9. March 10	<b>Happy Easter!!!!!!</b>	
10. March 17	<b>Chapter 8</b>	
11. March 24	<b>Chapter 9</b>	
12. March 31	<b>Chapter 10</b> <b>***Make sure that you're working hard on the strategic audit! **</b>	<b>Class Live Pro (7:30-8:30 PM CST) on 03/31</b>
13. April 07	<b>Chapter 11</b>	<b>Strategic Audit due on 04/07</b>
14. April 14	<b>Chapter 12</b>	<b>Class Live Pro (7:30-8:30 PM CST) on 04/14</b>
15. April 21	<b>Exam 2 Assigned (Chapters 7-12)</b>	
16. April 28	<b>Personal Strategic Plan</b>	<b>Exam Due on 04/28</b>
17. May 05	<b>*Last official week of class! **</b>	<b>Personal Strategic Plan due on 05/05</b>

### **TEAM STRATEGIC PLAN ASSIGNMENT:**

During the second week of the semester, you will be required to complete one strategic plan assignment (worth 50 points). The document must be compatible with Microsoft Word 2003. Develop team strategic plan - core values, operating guidelines, mission, vision, goals, strategies, critical success factors, distinctive competencies, and measurements – Strategic Model in Doc Sharing. Also individually complete Peer Evaluations – Form posted in Doc Sharing. This homework will be graded based on the level of detail and the depth and logic of your insight regarding strategies the teams should pursue. Specific instructions for this assignment will be posted under the “Doc Sharing” tab in eCollege. The assignment should be submitted to the designated “Dropbox”. Only one member of the group needs to submit the assignment for the group. A grading rubric for this assignment can be found at the end of this syllabus.

### **EXAM:**

There will be two exams and will test your comprehension of the Text book via multiple-choice, short answer, and essay items. The exams will be posted during the scheduled week as listed in the schedule. Specific instructions for the exams will be posted along with the exams at the scheduled time.

### **PERSONAL STRATEGIC PLAN (INDIVIDUAL):**

Personal Strategic Plan based on the Strategic Management Model in Doc Sharing. This Personal Strategic Plan (AKA Personal Development Plan) includes your own personal core values, operating guidelines, mission, vision, goals, strategies, critical success factors, distinctive competencies, measurements and other items that are strategically and tactically important to you. **Rubric 2 will also be used for this assignment.**

### **CASE ANALYSIS ASSIGNMENT (GROUP):**

You will be required to analyze one case as a group as scheduled in the “course schedule”. I’ve assigned one Group Case as listed in the schedule. Specific instructions for this case will be posted on eCollege, under the “Doc Sharing” tab. The analyses should be submitted to the “Dropbox” designated for that case. A grading rubric for the case assignment can be found at the end of this syllabus.

### **STRATEGIC AUDIT (INDIVIDUAL):**

The purpose of this exercise is to analyze a large corporation and its environments and apply strategic management concepts to find insightful strategic options for this firm. Based on an existing corporation, student will prepare a written strategic analysis applying strategic management concepts. Select an organization from Chart 1 i.e., from the list of Organizations/Companies for Individual Written Case Analysis (Strategic Audit). The audit will be graded based upon timeliness, specificity, depth and breadth of analyses, and SUPPORT (from peer-reviewed journal articles, corporate documents, etc.) for your recommendations. Specific instructions for this audit will be posted on eCollege, under the “Doc Sharing” tab. The audit should be submitted to the “Dropbox” designated for this assignment. The document must be compatible with Microsoft Word 2003/2007/2010. A grading rubric for this assignment can be found at the end of this syllabus.

### **THE ETS<sup>®</sup> MAJOR FIELD TEST IN BUSINESS (INDIVIDUAL):**

Your grade is based on a one-page (single spaced) essay on the Major Field Test which you will submit AFTER you complete the test. The essay question will be “How prepared were you for the Major Field Test? Discuss (1) the material for which you were most prepared and (2) the material for which you were least prepared. More information will be provided later in January.

**Chart 1: Organizations/Companies for Individual Written Case Analysis (Strategic Audit) Options  
(Only 1 Student per Organization – Yellow highlights indicate organizations have been chosen  
and are not available)**

\*Why am I asking that you not write individual cases on any alcoholic beverage, or cigarette companies? Ask yourself: Are they making money because of their strategic management capabilities and actions or because they sell legal addictive drugs, etc? We want to study organizations that have potential for success because of their strategic management capabilities and actions. My intention is to omit alcoholic beverage companies, and cigarette companies. However, I realize that some listed companies may own alcoholic beverage and/or cigarette companies.

Siemens (Corporate – Germany)	Reliance (India)	Alcatel-Lucent (Corporate France)	Infosys Technologies (India)
Whole Foods Market	Campbell Soup	Kraft	
L-3 Communications	Raytheon	Texas Instruments	Boeing
Berkshire Hathaway	HP	IBM	Xerox
Apple	Cisco Systems	Qualcomm	
AT&T	Amazon	eBay	DuPont
Intel	Microsoft	Oracle	Symantec
Google	LinkedIn	Facebook	Yahoo
Mayo Clinic	Parkland Hospital	Baylor Hospital System	Methodist Healthcare System
Texas A&M University System	MIT (Massachusetts Institute of Technology)	SMU (Southern Methodist U.)	Harvard
McKenzie	Ernst & Young	Price Waterhouse Cooper	Baylor University
Citigroup	JPMorgan Chase	Wells Fargo	SAS - <a href="http://www.sas.com">www.sas.com</a>
Starbucks	Texas Nameplate, Dallas small business (Baldrige recipient)	KARLEE Company, Dallas (Baldrige recipient)	Dave Ramsey Company
Ford	General Motors		
Home Depot	Lowes	FedEx	UPS

**Rubric 1 - Individual Written Case Analysis (Strategic Audit) Rubric (Word document & PowerPoint Presentation) - Students who score less than 70 points on individual written case (and accompanying PowerPoint slides) will be required to re-submit it, with the understanding that a re-submission cannot score more than 80 points.**

	<b>Exceeds Minimum Standards</b>	<b>Meets Minimum Standards</b>	<b>Fails to Meet Standards</b>
<b>Introduction to the Organization (I)</b> – Company History. Current Status. Executives. Business Model – 6 points	Includes essential material in this section. Any additional material is in an appendix. (Also PP slides) 5-6 points	Includes essential material in this section. Any additional material is in an appendix. (Also PP slides) 3-4 points	Essential material not included and/or PP slides not included. 0 to 2 points
<b>Identification of Industry &amp; competitors (II)</b> (2 points)	Lists and briefly discusses industry(ies) in which organization competes & its competitors – 2 points	Lists and briefly discusses industry(ies) in which organization competes & its competitors – 2 points	Fails to address industry(ies) in which organization competes and/or its competition. 0 to 1 point.
<b>Analysis of the Industry (III)</b> Strategic group, Porter's 5 Forces, Industry CSF's, & Successful & Failed Organizations - 10 points	Analyzes organization's strategic group(s), critical success factors for industry, & lists successful & failed organizations. Discusses Porter's 5 Forces & provides an in-depth analysis for industry & organization-9-10 pts	Meets the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address some of the requirements. – 7 or 8 points	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements. – 0 to 6 points
<b>Analysis of Macro-Environment (IV)</b> (Political, Economic, Social, and Technological forces - Opportunities & threats. Includes identification & analysis of global factors & application of analysis to business situation. 12 points	Demonstrates knowledge of, & capability to apply, theories and tools in the analysis of Macro-Environment (e.g., Political, Economic, Social, and Technological forces). Also identifies the threats and opportunities facing the organization. 10-12 points	Meets basic criteria for this Outline Item. Fails to demonstrate knowledge of, or ability to use, theories & tools needed to analyze Macro-Environment. May not identify some threats and/or opportunities facing the organization. – 7-9 points	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 6 points.
<b>Analysis of Organization - Measurement and control system (V)</b> - Current financial position - Use financial analysis tools - Compare with competitors and standards. List KPI's (Key Performance Indicators) – 15 points.	Applies financial analysis theories and tools to determine organization's current financial position & compares it with competitors and standards. Discusses its measurement and control system & KPI's – 13-15 points.	Meets basic criteria for this Outline Item. Fails to demonstrate knowledge of, and/or capability to apply, financial analysis theories & tools and/or fails to compare it with competitors and standards – 10-12 points.	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of, or capability to apply, theories & tools needed to address most of the requirements – 0 – 9 points
<b>Analysis of Organization (VI)</b> – Mission, Vision, Core Values, Operating Guidelines, Core Competencies, Goals - 10 pts.	Demonstrates knowledge and capability to apply theories and tools in the analysis of the organization in terms of its mission, vision, core values, operating guidelines, and core competencies – 9-10 points.	Meets the basic criteria for this Outline Item, but fails to demonstrate knowledge of, or capability to apply, theories needed to address some of the requirements – 7-8 points.	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 6 points.
<b>Analysis of Organization (VII)</b> – Current Strategies, Alignment with goals. Compares with competition. Completes SWOT analysis and Gap analysis for organization. Suggests strategies. Evaluates strategies –20 points	Demonstrates knowledge of, and capability to apply, theories & tools in analysis of organization (current strategies, alignment of strategies with goals, competition). Uses SWOT & Gap analyses. Suggests strategies & evaluates each of them - 17-20 points.	Meets the basic criteria for this Outline Item, but fails to demonstrate knowledge of, or capability to apply, theories needed to address some of the requirements – 12-16 points.	Meets some basic criteria for this Outline Item. Fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 11 points.
<b>Analysis of Organization (VIII)</b> – Functional Strategies (10 pts)	Marketing, Finance, Operations, Purchasing Human Resources, Information Systems Strategies and their alignment – 9-10 pts.	Meets basic criteria. Fails to demonstrate knowledge of, or ability to apply, theories needed to address requirements – 6-8 pts.	Fails to demonstrate knowledge of, & ability to apply, theories needed for most requirements - 0-5 pts.
<b>Analysis organization's improvement initiatives &amp; standards (IX)</b> – 10 points	Analyzes current & previous improvement initiatives & standards & impact – 9-10 pts.	Meets basic Outline Item criteria. Fails to address some requirements – 6-8 points.	Fails to address most of the Item Requirements – 0-5 points.
<b>Conclusion and Future of Organization (X)</b> – 5 points	Addresses expected results & organization's potential for future success – 5 points	Meets basic Outline Item Criteria. Fails to address some requirements 3-4 pts.	Fails to address most of the Item Requirements – 0-2 points

**Individual Written Case Analysis (Strategic Audit) Outline – Rubric 1 applies to this. (Assignment:**  
Each student will develop a case about, analyze, and make recommendations about an organization listed on Chart 1. Professor approval is required. Deliverables are a written case analysis (strategic audit) & PowerPoint presentation - 30% of grade for class).

- I. Introduction to the Organization** - History of the Company & Current Status -- A. When was the organization founded, why and by whom? Discuss unusual history associated with the organization. B. Is it privately or publicly held? C. Who are its top executives in terms of experience, academic credentials, diversity, etc.? D. Discuss the organization's Business Model? E. **What is the impact of globalization on this organization?** Other information?
- II. Identification of the Industry and the Competitors** -- Industry definition is necessary so that competitors can be identified; macro-environmental forces that affect the organization and its industry can be assessed, and the organization's relative strengths and weaknesses can be compared to other organizations within the industry.
- III. Analysis of the Industry**
  - A. Strategic Group(s) in which the company exists and competitors in it/them.
  - B. Intensity of rivalry among existing competitors. Use Porters 5 Forces for B, C, D, E, and F. (C). Threat of new competitors entering the industry; (D) Threat of substitute products or services; (E) Bargaining power of buyers and (F) Bargaining power of suppliers
  - G. Potential Profitability of the Industry - What organizations have succeeded and failed in the industry and why?
  - H. What are the Critical Success Factors for the industry?
- IV. Analysis of the Macro-Environment (Includes identification & analysis of global factors & application of analysis to business situation)**
  - A. What political/legal forces affect the industry?
  - B. What economic forces affect the industry?
  - C. What social forces affect the industry?
  - D. What technological forces affect the industry?
  - E. What are the opportunities and threats facing the organization?
- V. What is the organization's measurement and control system?**
  - A. Current financial position - Is the organization financially sound?
  - B. Compare with competitors and standards.
  - C. Use financial analysis tools.
  - D. What are the organization's Key Performance Indicators (KPI's)?
- VI. Analysis of the Organization (Mission, Vision, Core Values, Operating Guidelines, Core Competencies, Goals)**
  - A. What is the mission of the organization? Has the mission changed over time?
  - B. What is the vision of the organization? Has the vision changed over time?
  - C. What are the organizations core values and operating guidelines? **Analyze current problems that conflict with the organization's core values and operating guidelines.**
  - D. What are the organization's core competencies? How are they unique?
  - E. What are the organization's broad and specific goals?
- VII. Analysis of the Organization – Organization-Level and Business Unit Strategies**
  - A. What are the current organization-level strategies? Business unit strategies?
  - B. How are the strategies aligned with the goals?
  - C. Compare this organization's strategies with those of competitors.
  - D. Use SWOT analysis and Gap analysis to suggest strategies.
  - E. Evaluate strategies (advantages & disadvantages of each strategy).
  - F. Key performance indicators (KPI's)
- VIII. Analysis of the Organization – Functional Strategies**
  - A. Marketing – Finance – Operations – Purchasing – Human Resources – Information Systems
  - B. How well are the functional strategies aligned?

- IX. Analyze organization's improvement/change initiatives** (e.g., Six Sigma, SQM, TQM, Lean Manufacturing, JIT, Process Reengineering, High Performance Work Teams, Assessment using Malcolm Baldrige National Quality Award Criteria, ISO 9000, ISO 14000, Benchmarking, Balanced Scorecard, etc.)
- A. Previous & current impact/success of improvement initiatives.
  - B. Alignment of improvement initiatives and integration into strategic management of the organization.
  - C. Comparison of improvement initiatives with other organizations within and outside the industry.
- X. Conclusion and Future of Organization** - Comment about the organization's profile for future competitiveness and success. What does the organization have to do right to succeed (organization's Critical Success Factors)? What are the expected results in terms of short-and long-term profitability and survival?

## Rubric 2 – Team Strategic Plan and Individual Evaluation of Self and Other Team Members

	<b>Significantly Exceeds Minimum Standards</b>	<b>Meets or Somewhat Exceeds Minimum Standards</b>	<b>Fails to Meet Standards</b>
<b>*Core Values</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Operating Guidelines</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*SWOT Analysis</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Mission</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Vision</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Broad and Specific Goals</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Strategies</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Critical Success Factors</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Distinctive Competencies</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
<b>*Measurements</b>	Accurate per text and Model in Doc Sharing – 9-10 points	Mostly Accurate per text and Model in Doc Sharing – 7 – 8 points	Failed to meet minimum standards - Zero Points
	90 - 100	70 - 80	
<b>**Individuals Complete Evaluation Form for Self &amp; Other Team Members *Students get strategic plan points based on plan IF they complete the evaluation.</b>	Complete evaluation for self and other team members AND functioned as required by team strategic plan. See Doc Sharing for form.	Complete evaluation for self and other team members AND mostly functioned as required by team strategic plan	Failed to evaluate team members or provide required information – And/or failed to function as required by team strategic plan

**\*Complete as a team first 10 items (elements of Team Strategic Plan due on or before 1/27/2014 by 8:00 AM CST.**

**\*\*Complete evaluation form individually – Due on or before 2/17/2014 by 8:00 AM CST.**

**Use the following AND RUBRIC 3 for the team case from textbook (Case 12: Toyota in Crisis, Page 593). This outline is from Parnell, J. (2013). *Strategic Management*, 3<sup>rd</sup> Ed., 2009 and 4<sup>th</sup> Ed. 2013.**

Business Strategy Project Steps

Step	Topic/Question	Chapter-Pg-3 <sup>rd</sup> ed	Chapter-Pg-4 <sup>th</sup> ed
1	Introduction of the organization	1-10	1-13
2	Identification of the industry and competitors	3-40	2-32
3	Potential profitability of the industry	3-51	2-43
4	Who has succeeded and failed in the industry and why? What are the critical success factors?	3-51	2-43
5	What political/legal forces affect the industry?	4-67	3-62
6	What economic forces affect the industry?	4-71	3-68
7	What social forces affect the industry?	4-78	4-89
8	What technical forces affect the industry?	4-82	4-96
9	What are the organization's Mission, Vision, Core Values, Operating Guidelines, Core Competencies, Goals? See Strategic Management Model in Doc Sharing.		
10a	What is the current firm-level strategy?	6-132	6-163
10b	What is the current business-level strategy?	7-162	7-197
11	What business-level strategies are presently being employed by competitors?	7-164	7-199
12	What is the organization's marketing strategy?	8-179	8-225
13	What is the organization's financial position and financial strategy?	8-182	8-227
14	What are the organization's production and purchasing strategies?	8-186	8-231
15	What are the current strategies in other functional areas such as HR and information systems?	8-189	8-235
16	What strengths exist for the organization?	9-204	9-253
17	What weaknesses exist for the organization?	9-204	9-253
18	What opportunities exist for the organization?	9-205	9-255
19	What threats exist for the organization?	9-205	9-255
20	What strategic alternatives are available for the organization?	9-208	9-259
21	What are the pros and cons of these alternatives?	9-208	9-259
22	Which alternative(s) should be pursued and why?	9-208	9-259
23	How should the alternative(s) be implemented?	11-255	11-305
24	How should the alternative(s) be controlled?	12-278	12-334
25	What improvement initiatives are currently being implemented?		7-193
26	What crisis events should the firm anticipate? What are the future prospects for the company?	12-281	12-341

**Rubric 3 – Team Case from Textbook (Case 12: Toyota in Crisis, Page 593) – Word document and PowerPoint Slides.** See List of 26 Questions.

	<b>Exceeds Minimum Standards</b>	<b>Meets Minimum Standards</b>	<b>Fails to Meet Standards</b>
<b>Introduction to the Organization (Q1) – and Business Model (2 points)</b>	Includes all essential material in this section. 2 points	Includes essential material in this section. 2 points	Essential material not included 0 points
<b>Identification of Industry &amp; competitors (Q2) (6 points)</b>	Lists and discusses industry(ies) in which organization competes & its competitors 6 points	Lists and briefly discusses industry(ies) in which organization competes & its competitors – 3-5 points	Fails to address industry(ies) in which organization competes and/or its competition. 0 to 2 points.
<b>Analysis of the Industry (Q3,4)</b> Strategic group, Porter's 5 Forces, Industry Critical Success Factors, & Successful & Failed Organizations - 10 points	Analyzes organization's strategic group(s), critical success factors for industry, & lists successful & failed organizations. Discusses Porter's 5 Forces & provides an in-depth analysis for industry & organization-9-10 pts	Meets the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address some of the requirements. – 7 or 8 points	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements. – 0 to 6 points
<b>Analysis of Macro-Environment (Q5,6,7,8)</b> (Political, Economic, Social, and Technological forces – Threats & Opportunities facing the organization - 12 points	Demonstrates knowledge of, & capability to apply, theories and tools in the analysis of Macro-Environment (e.g., Political, Economic, Social, and Technological forces). Also identifies the threats and opportunities facing the organization. 10-12 points	Meets basic criteria for this Outline Item. Fails to demonstrate knowledge of, or ability to use, theories & tools needed to analyze Macro-Environment. May not identify some threats and/or opportunities facing the organization. – 7-9 points	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 6 points.
<b>Analysis of Organization - Measurement and control system (Q13)</b> - Current financial position and strategy - Use financial analysis tools - Compare with competitors and standards. List Key Performance Indicators – 15 points.	Applies financial analysis theories and tools to determine organization's current financial position & compares it with competitors and standards. Discusses its measurement and control system & KPI's – 13-15 points.	Meets basic criteria for this Outline Item. Fails to demonstrate knowledge of, and/or capability to apply, financial analysis theories & tools and/or fails to compare it with competitors and standards – 10-12 points.	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of, or capability to apply, theories & tools needed to address most of the requirements – 0 – 9 points
<b>Analysis of Organization (Q9)</b> Mission, Vision, Core Values, Operating Guidelines, Core Competencies, Goals - 10 pts.	Demonstrates knowledge and capability to apply theories and tools in the analysis of the organization in terms of its mission, vision, core values, operating guidelines, and core competencies – 9-10 points.	Meets the basic criteria for this Outline Item, but fails to demonstrate knowledge of, or capability to apply, theories needed to address some of the requirements – 7-8 points.	Meets some of the basic criteria for this Outline Item, but fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 6 points.
<b>Analysis of Organization (Qs)</b>	Demonstrates knowledge of, and	Meets the basic criteria for this Outline	Meets some basic criteria for this

<b>10a, 10b, 11, 16-19, 20-24)</b> – Current Strategies, Align with goals? Compares with competition. Completes SWOT and Gap analyses for organization. Suggests strategies. Evaluates strategies –20 points	capability to apply, theories & tools in analysis of organization (current strategies, alignment of strategies with goals, competition). Uses SWOT & Gap analyses. Suggests strategies & evaluates each of them - 17-20 points.	Item, but fails to demonstrate knowledge of, or capability to apply, theories needed to address some of the requirements – 12-16 points.	Outline Item. Fails to demonstrate knowledge of theories needed to address most of the requirements – 0 – 11 points.
<b>Analysis of Organization (Q12, 14, 15)</b> – Functional Strategies (10 pts)	Marketing , Finance, Operations, Purchasing Human Resources, Information Systems Strategies and their alignment – 9-10 pts.	Meets basic criteria. Fails to demonstrate knowledge of, or ability to apply, theories needed to address requirements – 6-8 pts.	Fails to demonstrate knowledge of, & ability to apply, theories needed for most requirements - 0-5 pts.
<b>Analysis organization’s improvement initiatives &amp; standards (25)</b> – 10 points	Analyzes current & previous improvement initiatives & standards & impact – 9-10 pts.	Meets basic criteria for Outline Item. Fails to address some requirements – 6-8 points.	Fails to address most of the Item Requirements – 0-5 points.
<b>Conclusion and Future of Organization Crises? (26)</b> – 5 points	Addresses expected results & organization’s potential for future success – 5 points	Meets basic criteria for Outline Item. Fails to address some requirements – 3-4 pts.	Fails to address most of the Item Requirements – 0-2 points