



Portland State University    University Studies Senior Capstone  
School of Business Administration    BA495 BUSINESS STRATEGY    Term: W2014

**Professor: Lihong Qian**

**BA 495:** CRN 60288, Section 009, Mon & Wed 9:00am – 11:50am

**Classroom:** SBA 290

**Office:** SBA 465

**Office hours:** by appointment

**Phone:** 503-725-9583

**Fax:** 503-725-5850

**Email:** [qian3@pdx.edu](mailto:qian3@pdx.edu)

**Required Reading**

- **Text:** Frank T. Rothaermel, *Strategic Management: Concepts*. ISBN-13 9780077324452
- **Cases:** Instructor will provide instructions.
- **Capstone Student Handbook:** Each student is required to review the Handbook to be found on-line at <http://www.pdx.edu/sba/capstone>

**Supplemental Reading**

- Bruce R. Barringer & R. Duane Ireland (2007). *Entrepreneurship: Successfully Launching New Ventures* (2nd Edition). Upper Saddle River, N.J.: Prentice Hall.
- Robert Gunn & Chris Durkin (eds.) (2010). *Social Entrepreneurship: A Skills Approach*. Bristol, Great Britain: The Policy Press.
- Peri H. Pakroo (2009). *Starting & Building a Nonprofit: A Practical Guide*. Berkeley, CA: Nolo.

**Course Overview**

- Effective strategies lead organizations to *stand out*—for what they do and how they do it. A pillar of Portland State University's strategy is to develop students who can apply interdisciplinary learning to real world issues and become leaders of change. PSU's University Studies program has frequently received international recognition for a distinguished undergraduate experience.
- The University Studies capstone course contributes to this strategic pillar by enhancing the lives of PSU seniors through service learning with partners in the community.
- The Business Strategy Capstone course is designed to provide an integrative experience along two dimensions: 1) as a culminating experience for the University Studies program at PSU; and 2) as a way for business students from different majors to combine their knowledge and work together to work in the field with an external partner on pressing strategic issues.

**Course Objectives**

In this course, we will rely on business strategy frameworks to thoroughly analyze the client's strategic issues and formulate recommendations. The strategy content and the client project have been selected so our students can experience the key goals of the University Studies Program (appreciation of the diversity of the human experience, communication, critical thinking, and social/ethical responsibility) while having a meaningful impact on the community.

### Five Primary Goals of the Business Strategy Capstone Course

1. Make a difference in the community. This means being “all in” to serve your client, striving to produce recommendations for superior future performance.
2. Appreciate human diversity. In this course, we will focus on diversity issues that are central to business success: embracing cultural differences, addressing the needs of varied stakeholders, and working through differences across team members.
3. Understand social and ethical responsibilities. Businesses confront profound social and ethical issues in their pursuit of corporate social responsibility. Both through case analyses and the client work, you will need to weigh the social, environmental, and economic implications of your recommendations.
4. Engage in effective communication. Throughout your career, effective communication will be fundamental to your success, so we will practice both written and oral, and individual and team communication.
5. Hone critical thinking skills. Your client project will require you to thoroughly understand the client’s problem, analyze pertinent data, and formulate recommendations. Working with a client will make this process very real and exciting.

### Course Policy

- This class will be taught in a dynamic case-method format. Everyone will be expected to attend every class, contribute to class discussions, and visit the Client’s operations. Do not search the internet to see “what happened” after the time of the case, because this could limit your thinking as to possible outcomes.
- Laptop use during lecture is prohibited, unless you are using the laptop to take notes. [If that is the case, please see me for permission. In these circumstances, I’ll ask that you email me your notes taken for the lecture for the first 4 class sessions.] *Exception:* on the days where we have client work, having a laptop within your group is helpful, but not essential. Cell phones and mobile devices, PDAs etc. should be silenced and put away during class.
- Teamwork: Each student will be assigned to a team to work on a client project. Mutual respect and cooperation among team members are crucial for your success in delivering a sound final product to the client.
  - Within each team, members will alternate in serving “Team Leader” in weekly project tasks. The purpose of this is to cultivate contribution as well as communication, and to avoid dominance by one single member.
  - Your grades of all team-based work (i.e., team presentations and final report) are subject to the evaluation of your team members. Don’t be a free-rider on the project. Strong contributions to projects, showing a collaborative attitude, regular attendance both in class and at team meetings are essential for optimal grading. In situations where someone is consistently not sharing the responsibilities of the project, or delivering poor quality and/or late work to the group members, it is essential that others on the team help the person understand what issues exist and have everyone on the team brainstorm possible solutions. If team-related issue persists, step 1 is for all of us to meet and sort things out. Step 2 is a follow on meeting to make sure things are better.
- Class attendance: Unexcused absences and lateness will affect grades. Absences will be excused only if you are sick or have a family emergency. I will ask for doctor’s note if necessary. If you have to be absent for strong professional reasons (e.g., job fair), I need to see written proof. All other absences are unexcused. In any event, you must email me in advance of class to let me know your situation.

## Course Grading

<b>Client Project:</b>		<See Appendix 1>
25%	Final Client Report with Strategic Recommendations	
25%	Client Project Presentations [5% PESTEL+6 Forces; 5% VRIO+SW; 5% Financials; 10% Final Presentation]	
5%	Top Management Team (TMT) critiques [Written & Oral]	

### Preparation and Analysis of Readings:

10%	Short write-ups posted to D2L	<See Appendix 2>
10%	Essay on UNST Studies Goals in this Capstone	<See Appendix 3>
5%	Attendance	<See Course Policy>
20%	Discussion Contributions in-class [Excellent performance: makes high quality contributions in every class; Good performance: participates often; Fair performance: participates sometime; Poor performance: does not participate.]	<See Appendix 4>

**Academic Honesty:** Students will uphold the honor code in all work associated to this course. All work must be original and non-original work should be appropriately referenced. Copying material from the internet or any other source without proper citation is considered plagiarism and cheating and will receive a failing grade. For more information regarding PSU's policies on behavior and academic honesty, please see: <http://www.pdx.edu/dos/psu-student-code-conduct>

The SBA provides academic advisors as well as career and internship advisors to assist students in making the most of their collegiate experience. Academic advisors are trained to provide counsel in a wide range of issues. From selecting a business major to evaluating transferred transcripts, academic advisors are here to help students with all of their degree related questions. The following is a brief summary of the type of issues with which academic advisors can offer assistance

**DARS reports / SBA admissions requirements / Major selection and requirements / Transcript evaluation / Course overrides / Transfer credit petitions / Career planning / Portland State rules and policies**

In addition to academic advising, the SBA provides career and internship advisors to assist students in landing a job upon graduation or a summer internship while students are still in pursuit of their degree. Career and internship advisors can also provide resume and interview guidance. All SBA advisors are available by appointment, which must be scheduled in advance. Drop-in hours are available as well. Drop-in hours are held regularly throughout the week and are designed to help answer routine or simple questions. For more information about SBA advising and drop-in hours please visit the School of Business website at <http://www.pdx.edu/sba/> and click on student resources.

## Weekly Schedule

Week	Topic	Case/Readings/Text	UNST Goals
1. Mar 31	<b>Introduction:</b> Course and Client Projects	<b>Readings:</b> Syllabus and Materials in course D2L sites <b>Project Assignment:</b> Read: (1) The clients' project overview; (2) The Syllabus; (3) The Capstone Student Handbook: <a href="http://www.pdx.edu/sba/sites/www.pdx.edu.sba/files/Handbook-%20Student%20Capstone.pdf">http://www.pdx.edu/sba/sites/www.pdx.edu.sba/files/Handbook-%20Student%20Capstone.pdf</a> (4) Materials on the Business Capstone website: <a href="http://www.pdx.edu/sba/capstone">http://www.pdx.edu/sba/capstone</a>	1. <b>Inquiry and Critical Thinking</b> 2. <b>Communication</b>
		(1) Bring your questions about the syllabus and client project.	
1. Apr 2	<b>What is Strategy?</b>	<b>Guest speaker:</b> manager from client organization <b>Text:</b> Ch1. What Is Strategy and Why Is It Important? Ch2. The Strategic Management Process <b>Readings:</b> material about clients (in D2L)	1. <b>Inquiry and Critical Thinking</b>
		<u>Work on Client Project</u> (1) Prepare questions for the client related to their project overview. (2) Research all of the clients online (their websites; competitor websites; etc.) (3) Take notes on the overview provided by the client. The person will describe the pressing issue that you will address as part of your business plan and strategic recommendations deliverables. [At end of class, you will specify your preferences regarding the clients. I will assign you to a client team to strive for functional diversity.]	
2. Apr 07	<b>Teamwork tasks:</b> Prepare Scope of Work for Client Project	<b>Readings:</b> Client's scope of work; Materials for course project in D2L <b>Readings:</b> "Groups are Fun and Not Fun.pdf" (in D2L)	1. <b>Inquiry and Critical Thinking</b>
		<u>Get to know Team and Start working on Client Project</u> (1) What from the "Groups are Fun and Not Fun" reading did you experience in a prior dysfunctional team; in a prior excellent team? (3) Each team will need to summarize its client's scope of work in 1-2 paragraph(s) and prepare a bullet point of deliverables that will form the outline for the final report. (4) Each team will present this summary and list of bullet points with PPT. Each member will talk through the bullet points that s/he will lead.	
2. Apr 09	<b>Teamwork tasks:</b> Understand Client's business	<b>FIELD DAY (No Class):</b> With your team, meet with your client to better understand client business.	1. <b>Inquiry and Critical Thinking</b> 2. <b>Communication</b>
		<u>Work on Client Project</u> (1) If available, walk through financial statements of client. (2) Outline key performance metrics related to your team's scope of work. (3) Research important trend data affecting client's business.	
3. Apr 14	<b>Teamwork tasks: SOW</b>	With your team, finalize Scope of Work, and submit it to D2L dropbox by end of day	
3. Apr 16	<b>Evaluating Environmental</b>	<b>Text:</b> Ch3. External Analysis: Industry Structure, Competitive Forces, and Strategic Groups	1. <b>Diversity of Human</b>

	<b>Opportunities and Threats</b>	<b>Case:</b> Tropical Salvage: From Recession to Expansion, Portland State University, SBA <b>Reading:</b> Bloom and Chatterji, “Scaling Social Entrepreneurial Impact,” <i>CMR</i> , 51(3): 114-133.	<b>Experience:</b> international firm perspective
	<u>Questions for Discussion</u> (1) Analyze the 2 most important PESTEL elements for each client. (2) Analyze the 5 Forces + Complements for the furniture industry. (3) How well is Tropical Salvage positioned to survive the primary threats? And take advantage of opportunities running their own retail stores and offering new product lines? What additional opportunities might Tropical Salvage pursue? (4) Which SCALERS element is the most important for Tropical Salvage to scale as a social enterprise? Why?		
4. Apr 21	<b>Teamwork:</b> Evaluating Client’s external environment ( <u>graded presentation</u> )	<b>Project:</b> Evaluate the external factors (e.g., PESTEL and the “6” forces) that influence the Client’s business by drawing on pertinent data. Analyze the biggest threats and the greatest opportunities. What would you recommend to the Client regarding its pressing strategic issue given these factors?	1. <b>Inquiry and Critical Thinking</b> 2. <b>Communication</b>
	<u>Work on Client Project</u> ( <i>All team members should present; this is a graded presentation.</i> ) (1) Each team will prepare their external analysis in a PPT slide deck ( <i>before class post to D2L</i> ), the primary threats and opportunities, and recommendation. <ul style="list-style-type: none"> <li>• Focus on the external factors that are the MOST pertinent to the client.</li> <li>• Provide data to back up your analysis. Use data at the level of the client. (Include citations to the data and research.)</li> </ul>		
4. Apr 23	<b>Business-level Strategy</b>	<b>Text:</b> Ch6. Business Strategy: Differentiation, Cost Leadership, and Integration <b>Reading:</b> 1. Lack of peripheral vision – How Starbucks failed in Israel, <i>African Journal of Marketing Management</i> 2. Business Model Canvas.ppt	1. <b>Critical Thinking</b> 2. <b>Diversity of Human Experience</b>
	<u>Questions for Discussion</u> (1) Drivers of differentiation, cost leadership, and integration strategy (2) Which strategy does Starbucks pursue? (3) What were the fatal flaws in Starbucks’s strategy in Israel? (4) Analyze your client’s business-level strategy and business model.		
5. Apr 28	<b>Diversity: cross-cultural, team</b>	<b>In-class simulation</b> <b>Text:</b> Ch10. Global Strategy: ONLY section on Hofstede’s Cultural Dimensions.	
5. Apr 30	<b>Evaluating a Firm’s Strengths and Weaknesses</b>	<b>Text:</b> Ch4. Internal Analysis: Resources, Capabilities, and Activities <b>Case:</b> Tesla Motors & US Automotive Industry	1. <b>Inquiry and Critical Thinking</b> 2. <b>Communication</b>
	<u>Questions for Discussion</u> (1) Conduct a PESTEL analysis. What driving forces are impacting U.S. car manufacturers? What can they do about it? (2) Looking at the industry environment (Porter’s Five Forces), how should Tesla position itself for competitive advantage? (3) Looking at Tesla’s resources, capabilities, and competencies, can Tesla gain (and sustain) a competitive advantage? Why or why not? (4) Can Tesla Motors be a viable business? Why or why not?		

<p><b>6.</b> <b>May 05</b></p>	<p><b>Teamwork:</b> SWOT Analysis of Client's Strategic Issue</p>	<p><b>Project:</b> In the context of the Client's pressing strategic issue, evaluate the Client's relative to 1 competitor (each team for a particular client should choose a difference competitor). What would your team recommend to the Client regarding the capabilities it needs to acquire?</p>	<p>1. <b>Inquiry and Critical Thinking</b></p>
<p><u>Work on Client Project</u> <i>(All team members should present; this is a graded presentation.)</i>                  (1) Identify the 5 key resources that would lead to capabilities and ultimately core competencies? Analyze by using the VRIO framework.                  (2) Assess how these core competencies will lead to competitive advantage for your client by doing a SWOT matrix that leads to strategic recommendations.                  (3) Assess your client's SWOT matrix relative to 1 close competitor. How should you refine your recommendations based on the SWOT matrix given this assessment?</p>			
<p><b>6.</b> <b>May 07</b></p>	<p><b>Business Strategy: Strategic Entrepreneurship</b></p>	<p><b>Text:</b> Ch7. Business Strategy: Strategic Entrepreneurship and Innovation</p>	<p>1. <b>Inquiry &amp; Critical Thinking</b></p>
<p><u>Questions for Discussion</u>                  (1) Pick a framework in Ch7 to illustrate the most pressing threat and greatest opportunity for your client.                  (2) How does this influence your recommendations?</p>			
<p><b>7.</b> <b>May 12</b></p>	<p><b>Teamwork tasks:</b> Client's Ecosystem and Remaining issues</p>	<p><b>FIELD DAY: no class: meet with client this week</b>  <b>Project:</b> Visit Client's operations: go over your proposed recommendations; talk with Client about remaining issues.</p>	<p>1. <b>Community Contribution</b>                  2. <b>Critical Thinking</b>                  3. <b>Communication</b></p>
<p><b>7.</b> <b>May 14</b></p>	<p><b>What is Performance?</b></p>	<p><b>Text:</b> Ch5. Competitive Advantage &amp; Firm Performance  <b>Cases:</b> Chemalite, Inc., HBS [9-177-078]  <b>Readings</b> (skim it): "How to read financials_Merrill Lynch"</p>	<p>1. <b>Inquiry and critical thinking</b></p>
<p><u>Questions for Discussion</u>                  (1) Which performance metric is most appropriate for your client?                  (2) With your team, develop Chemalite's Balance Sheet for its first 6 months.                  (3) With your team, walk through the transactions of the second 6 months in the Balance Sheet, Income Statement and Cash Flow statement.</p>			
<p><b>8. May 19</b></p>	<p><b>Teamwork:</b> Evaluating Client's Financial Position</p>	<p><b>Project:</b> With your team, complete the list of start-up costs (if applicable), Balance Sheet, Cash Flow, and pro-forma Income Statement for the next 5 years, as well as the Breakeven analysis, using the Client's data.</p>	<p>1. <b>Community Contribution</b>                  2. <b>Inquiry and Critical Thinking</b></p>
<p><u>Work on Client Project</u> <i>(All team members should present; graded presentation.)</i>                  (1) Be prepared to present your client's start-up costs (as applicable), and financial statements. Note that it is recommended that you create monthly entries for the first year in the income statement and cash flow statement, and then annual entries for the subsequent 4 years. Create a PPT slide deck <i>(before class post to D2L)</i>.                  (2) How do your emerging recommendations play out in the financials?</p>			<p>3. <b>Communication</b></p>

8. May 21	Corporate Strategy	<p><b>Text:</b> Ch8. Vertical Integration &amp; Diversification Ch9. Alliances, Networks, and Acquisitions</p> <p><b>Case:</b> Better World Books: Social Entrepreneurship and the Triple Bottom Line, Georgia Tech</p>	1. Ethics and Social Responsibility
<p><u>Questions for Discussion</u></p> <p>(1) What do you think about the Mission statement of Better World Books?</p> <p>(2) What is their Business Model? Is it ethical?</p> <p>(3) Search the Internet for information on a B-corp and measuring the Triple Bottom Line: is BWB fulfilling these goals?</p> <p>(4) What are the creative ways that BWB manages its value chain?</p> <p>(5) What strategic alliances or other relationships across company boundaries would you recommend to BWB in order to: 1) ensure growth; 2) set up a migration path for BWB's business model given the threats it faces?</p> <p>(6) Stepping back, please synthesize this case and if you were the CEO, which part of your current strategy would you concentrate on? Which part would you change given the major threats (and opportunities) that exist?</p>			
9. May 26	<b>Memorial Day, No Class!</b>		
9. May 28	Teamwork & Individual Essay	<p><b>Project:</b> Each team will meet with professor and walk through final report, final presentation, and any remaining issues.</p> <p><b>Note:</b> UNST Goals Essay due by 11:00pm.</p>	1. Diversity of Human Experience: small firm perspective
10. Jun 02	Teamwork	Run through of Final Presentation	1. Community Contribution
10. Jun 04	Teamwork	Presentation to Client (business attire)	2. Inquiry and Critical Thinking
11. Jun 10	Teamwork	<p>Presentation to Client (business attire)</p> <p><b>Final Project Due for All Teams (11:59pm)</b></p> <p><i>(post Final Project report into D2L)</i></p>	3. Communication

## Appendix 1

### Client Project: Business Plan and Strategic Recommendation

Working with an interdisciplinary team, you will develop a business plan (OR RELATED DELIVERABLE) for the external Client around a pressing strategic issue identified by the Client. After the second class session, you will be assigned a team with members who represent a cross-section of the business majors.

The team will produce a written report and a final presentation that make clear recommendations depending on the Client's scope of work.

#### Project Deliverables:

- See weekly assignments above.
- The final written report should be approximately **40 pages, NOT including** charts, graphs, resumes, tables, or outlines—please put those after the text, but explain them in the text. Reports should be typed and organized using subheadings for easy reference. 12 point font, double spaced with sub headings (see sample report).
- Make sure to cite all data and sources for quotes, chart data, etc. Follow the convention of: (Last name of source, date) in the text and use citation examples in BA495 library resource page for full citations in endnotes.
- Concepts from the course should be incorporated into all project deliverables as appropriate.
- Some of the richest recommendations come through primary research. Each team is expected to contact at least 3 organizations central to the scope of work. Please incorporate content into report and cite in the bibliography.

#### Deliverables during Finals Week:

- 1) The final PowerPoint presentation needs to be posted to D2L before the presentation to the client.
- 2) Before the start of the designated final exam time, post the final report and any helpful spreadsheets to D2L.

### Business Plan Components

Typical elements of a Business Plan are as follows. *(YOUR FINAL REPORT MAY HAVE VERY DIFFERENT ELEMENTS DEPENDING ON THE CLIENT'S SCOPE OF WORK.)*

#### I. INTRODUCTION:

- **Cover Page** – *The cover page should clearly state all members of your group alphabetically, the client's organization, and the date. Please do not go to the time and expense of "fancy" binding and coverings, the report needs to be stapled in the upper left-hand corner with the cover page on top.*
- **Table of Contents** – *Sections of the report and page numbers. The appendix must be ordered in the sequence referred by the narrative. Your first appendix will be the management plan – organizational chart (appendix A), through your last required appendix.*
- **Executive Summary** – *Provide brief summaries of each area covered in the body of your plan with the primary recommendations (try to keep to one page). The purpose is to provide a quick overview for easy reference and to create interest and "excitement" for the reader to continue into the specifics of the report. The executive summary should be written after the body of the report is completed. Each paragraph should have an associated*

subheading in the report (i.e. match exactly the evaluation sheet). **Each paragraph is similar to a “journal abstract” and should be an informative summary of the critical recommendations of each section.**

- State the overall key strategy problem or issue/opportunity that the client is facing.
- One-paragraph summaries of each area covered in the body of your plan with the primary recommendations: Company Description, Management, Marketing, Financial, and Strategic).
- Lastly, state your overall recommendation for the client and that the rest of the analysis serves to support this recommendation.
- 

**II. BODY:** (\* \*\*): include if appropriate and create a chart in an appendix in addition to the FULL narrative)

- **Overview of client’s primary issues addressed in the report (approx. 1/2 - 2/3 of a page).** Also include a brief history of the client’s organization.
- **Company Description and Management Plan:**
  - *Vision, Mission, Strategy*
  - *Organizational Structure \*\*\**
  - *Human Resources (Wages and Benefits)\*\*\**
  - *Production Process\*\*\* (PERT-program evaluation and review technique-diagram of process or schedule that is repetitious for the Client’s organization – example: restaurant – daily schedule, remodeler – job schedule, financial planner – client meeting etc.)*
  - *Facility Layout\*\*\* (if you are suggesting a change to their current operations)*
- **Industry Analysis and Market Feasibility:**
  - *Target Markets Focusing on Client’s Strategic Issue (RESEARCH – should have 5 –10 “cited” sources)*
    - *Primary issues in External Environment and resultant Threats and Opportunities (only include dimensions from PESTEL and 5 Forces + Complements that are pertinent)*
    - *Go beyond static analysis. If there are cycles in the industry or key events that affected some competitors more than others, note these.*
  - *Business-level Strategy*
    - *Industry size, projected growth, possible sales growth*
    - *Industry structure and pertinent strategic group for client*
  - *Competitor Analysis*
    - *Analyze top competitors relative to client (include: how does the client’s SWOT compare with their top competitor)*
    - *Primary issues from Internal Analysis (which resources/capabilities does the client has/ needs that would provide truly VRIO and lead to strengths for sustained competitive advantage)*
- **Marketing, Operations, and Sales Plan**
  - *Product/Service Characteristics (description) & Pricing Strategy*
    - *Status of product/service*
    - *Primary risks in market entry and expansion*
  - *Promotional Plan (Promotional mix and budget)*
    - *Market segmentation and buyer behavior*
    - *Marketing collateral: website content, brochures, etc.*
  - *Operations*
    - *Procedures, location, facilities, equipment*
  - *Distribution*
- **Financial Plan:** Based on Financial Analyses presented in class. Possible helpful resources: <http://www.score.org/resources/business-plans-financial-statements-template-gallery>  
*\*\*create a chart where the key elements and projections are explained in the text.*

- *Feasibility: How much money does the Client need and how do you propose to get it? Overall how will this client be successful and why (last part of this section written – include breakeven and costs)*
- *Projection of anticipated costs at start up\*\* (research – cite your sources: e.g., costco.com and catalogues)*
- *Pro Forma Income Statement, Balance Sheet, Cash Flow for first 5 years, with monthly income statement and cash flow broken out in first year\*\**
- *Break even projections\*\* (refer to text and [www.JavaCalc.com](http://www.JavaCalc.com))*
- *Scenario(s).*
  
- **Conclusion:**
  - *Strategic Recommendations – What should the client do and why regarding its pressing strategic issues?*
    - *Short term (one year or less), intermediate (2 - 5 year) and long range (5+ year) goals. These are GOALS – Small, Achievable, Measurable and Specific.*
    - *Conclude along the lines of: “Considering the alternatives presented in this report, the consulting team recommends the following strategies be pursued: (provide a bulleted list of your key recommendations).”*
  - *If your team identified additional strategic issues that the Client should address in the near term, present your analysis.*
  - *Also present your analysis of Corporate-level strategy opportunities regarding Vertical Integration, Diversification, Strategic Alliances, Networks, Acquisitions, and Geographic Expansion over the next 5 years if not in the scope of work but your team identified attractive opportunities in any of these areas.*
  
- **ADDITIONAL ATTACHMENTS:**
  - *Appendices – All charts, tables, graphs, etc.*
  - *Bibliography (can be either in the form of EndNotes so numbered as appeared in text or alphabetical). I will expect at least five DIFFERENT secondary sources to be utilized, credited, and cited in your report. DIFFERENT means five various sources (i.e. all web sites count as only ONE source). Possible sources include Internet, competitor information, brochures, personal interviews, marketing collateral, periodicals, newspapers, and books (one or more of each type – often students have a total of 5 or more sources within each “type”).*

[Acknowledgement: This project was adapted from a course project developed by PSU Professor Brenda Eichelberger and includes content from Barringer, Bruce R. (2009). *Preparing Effective Business Plans: An Entrepreneurial Approach*, Upper Saddle River, NJ: Pearson/Prentice Hall.]

## Appendix 2

### Short write-ups: Synthesis of Readings

UNST goal: **Inquiry and Critical Thinking**

UNST goal: **Communication**

The weekly short write-ups are due by:

- **10:00PM on Wednesdays. Late submissions are not accepted.**

The purpose of these postings is to have you step back and formulate a summary view of the material and link the course material to current events. Doing so will allow you to practice applying strategy constructs to real-world situations. You should become masterful at relating strategic management theory, concepts and frameworks to current events while understanding the implications of these events for business practice.

There are two parts of the short write-up:

First: ask **THREE** questions based upon the text reading and client projects, focusing on “what”, “why” and “how”. You don’t need to be exhaustive in covering the reading, but your questions need to be coherent and thoughtful. Each question is about 2-3 sentences.

- (1) For the “what” question, focus on a concept, an argument, a phenomenon or a finding from the text reading that is interesting, provocative or surprising to you.
- (2) For the “why” question, explain why the topic identified in your “what” question is important to the strategic analysis of the firm.
- (3) For the “how” question, critically think how the answers to your “what” and “why” questions are relevant to the client project you are working with.

Second, in a short paragraph, reflect on how either a) the reading for today’s class OR b) our discussions OR c) your client work over the previous week relates to some/all of the 5 Course Goals. If you or your team encountered challenges pertaining to any of the goals, explain how you worked through them.

- (1) Making a difference in the community;
- (2) Appreciation of the diversity of human experience;
- (3) Social/ethical responsibility;
- (4) Effective communication; and
- (5) Critical thinking.

[Note, you will be able to use these reflections as the basis of your essay on UNST goals.]

### Instructions for posting the Short write-ups:

- (1) Go to the Desire2Learn site for the course
- (2) Post in appropriate folder for the class session

## Appendix 3

## Essay

**University Studies Goals as Experienced in the BA495 Business Strategy Capstone**

3 pages, 1.5 spacing, 12 pt Arial font  
(10% of the course grade)

Due: 11:00pm on May 28th in dropbox section of D2L

This course has 5 primary goals that serve as the cornerstones around which each University Studies capstone class is designed: Inquiry and Critical Thinking, Communication, Appreciation of Human Diversity, Ethical and Social Responsibility, while contributing to a Community partner. These goals cover the following:

- **Make a difference in the community.** This means being “all in” to serve your client, striving to produce recommendations for superior future performance.
- **Appreciate human diversity.** In this course, we will focus on diversity issues that are central to business success: embracing cultural differences, addressing the needs of varied stakeholders, and working through differences across team members.
- **Understand social and ethical responsibilities.** Businesses confront profound social and ethical issues in their pursuit of corporate social responsibility. Both through case analyses and the client work, you will need to weigh the social, environmental, and economic implications of your recommendations.
- **Engage in effective communication.** Throughout your career, effective communication will be fundamental to your success, so we will practice both written and oral, and individual and team communication.
- **Hone critical thinking skills.** Your client project will require you to thoroughly understand the client’s problem, analyze pertinent data, and formulate recommendations. Working with a client will make this process very real and exciting.

**For the purpose of this essay, you are required to focus on the “social & ethical responsibilities” goal.**

As you craft your essay, remember to write from your own experience with I/me/my language. This essay may be very personal. It will be important that you generate your observations and experiences with detail. You can use your weekly posts in your essay. You also can draw on frameworks from prior classes to shape your essay. As you write, ask yourself how do I claim this to be true? Be sure the content of your essay reflects those claims.

You may consider these questions to craft the essay, addressing how you enhanced your approach to this goal:

- ❖ From my own lived experience, how did engaging in the community project for this course enhance my abilities in understanding/practicing ethical and social responsibility?
- ❖ How have the structure of this course, the assignments, the tasks of this class, and/or our class discussions enhanced my ability to analyze ethical and social responsibility?
- ❖ How does this process of self-reflection enhance my ability to critically think about my beliefs and attitudes towards the real world issues related to ethical and social responsibilities?
- ❖ How has the production of the inputs into the final project for the client allowed me to expand and practice my skills in ethical and social responsibility?
- ❖ How have the readings and in this class furthered my skills in this goal area? What new insights and understandings have I gained through the required reading of this course?

## Appendix 4

### Discussion & Contributions

**UNST goal: Inquiry and Critical Thinking**

**UNST goal: Communication**

A central part in developing your inquiry, critical thinking and communication skills will be active and thoughtful contributions to the class discussion. *Your contributions will be critical in refining your managerial and presentation skills, as well as to your learning and the learning of your classmates, so everyone is expected to participate in each class session.* I usually ask for volunteers, but I also cold call people throughout the class session.

In evaluating class contributions, I consider both quality and the frequency of contribution, but I weigh quality more heavily. *In assessing quality*, I consider the following dimensions:

- Is the student taking risks?
- Is the student creatively trying to experiment with strategic thinking and visioning?
- Does the comment simply repeat facts from the case, or does it provide analysis that adds to our understanding of the case and its broader implications?
- Does the comment fit well into the flow of the discussion? Is it linked to the comments of others?
- Does the comment trigger others to enter the analysis?
- Does the comment link the case material effectively to the material from the textbook?
- Does the comment reflect creative thinking, perhaps by tying together multiple viewpoints or tying back to material covered previously in the course?
- Is the comment presented in a clear, compelling manner or is it confusing, repetitive or contradictory?
- Is the comment delivered in a respectful, constructive tone?

In making my overall assessment of class participation, the overarching criterion is “*How significantly did this student’s contributions add to the learning of the class as a whole?*”